Claim order items

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Discover how to search, view, and claim missing order items in WorldShare Acquisitions. Use the Missing Order Items screen to claim and cancel order items that are missing.

View all missing order items

1. In the left panel, click Orders > Missing Order Items.
2. Click Search. The Missing Order Items screen displays all missing order items, past and present, by default.
   ◦ Results are sorted alphabetically by name.
   ◦ To change the sort order, click any column heading.
   ◦ To customize the column headings that appear, see Configure columns below. By default, not all column headings are visible.

Filter missing order items

Missing order items can be filtered using the filters at the top of the page. To customize the filters that appear, see Configure filters, below.

To apply filters to missing order items:

1. Click the filter name.
2. Select the values you want to apply. You can select one or more. When more than one value is selected, the system searches for any of the selected values.
3. Click Apply.
4. (Optional) To remove the filter, click Reset.

Filter descriptions

Some filters need explanation:

<table>
<thead>
<tr>
<th>FILTER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisition Type</td>
<td>One-Time, Subscription</td>
</tr>
<tr>
<td>Claims</td>
<td>Example: &quot;2 to 8&quot; finds items that you have claimed at least twice but not more than eight times.</td>
</tr>
</tbody>
</table>
Examples of combining filters to find items

For all of the below, set the Processing Type to **Monograph** and Acquisitions Type to **One-Time** to exclude serials, e-products, and subscriptions.

1. Items that have not arrived in the expected time for that vendor
   a. Set the Claims filter to **0 claims** made
   b. Select one or more **Vendors**
   c. Set the Order Date filter to the **desired number of days** for the selected vendors (e.g., 30 days since
Order Date for vendors A, B, and C)

2. Items that have not arrived in the expected time for that material type
   a. Set the Claims filter to 0 claims made
   b. Select one or more Material Types
   c. Set the Order Date filter to the desired number of days for the selected vendors (e.g., 20 days since Order Date for Books, DVDs, etc.)

3. Rush orders that must be claimed immediately
   a. Set the Claims filter to 0 claims made
   b. Set Shipping Type to Express and/or Next Day

4. Pre-paid items that must be claimed immediately
   a. Set the Purchase Status to Paid

5. Previously-claimed items that have not yet arrived
   a. Set the Claims filter to 1 or more claims made
   b. Set the Last Claimed Date to the desired number of days since the last claim (e.g., 5 days since the item was last claimed)

6. Cancel items because they have been claimed too many times with no result
   a. Set the Claims filter to the library's maximum claim limit (e.g., 6 times)

Configure filters

You can choose the filters that appear. All filters appear, by default. Selected filters have a check mark next to their name.

1. Click Filters (at the top right of the screen).
2. To select or deselect a filter, click on the filter name.
3. (Optional) You can search through the list of filters by entering a keyword in the search box.

Search missing order items

1. On the left navigation, click Orders.
2. Click Missing Order Items.
3. On the Missing Order Items screen, enter your search terms into the Find item or order search box.
   Note: If you enter more than one term, all words must appear in the same field to be retrieved.
   ◦ For example, you cannot search for an author and title at the same time. If you enter multiple search terms, they must all be found in the title field or all be found in the author field.
4. Click outside of the search box or press <Enter>.
5. Your results will appear in the table.
Missing order items screen columns

Some column headings need explanation:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Period</td>
<td>Budget period of the fund assigned to the item.</td>
</tr>
<tr>
<td>Claims</td>
<td>Number of times the item has been claimed.</td>
</tr>
<tr>
<td>Create Date</td>
<td>Date the item was added to the order.</td>
</tr>
<tr>
<td>Last Claimed Date</td>
<td>Date the item was last claimed.</td>
</tr>
<tr>
<td>Notes</td>
<td>Any notes about the order item.</td>
</tr>
<tr>
<td></td>
<td>- Click the <strong>Add Note button</strong> to add a new note, or</td>
</tr>
<tr>
<td></td>
<td>- Click the <strong>Add/Edit Note button</strong> to add or edit notes.</td>
</tr>
<tr>
<td>Order Name</td>
<td>The name of the order. Click the <strong>Order Name</strong> to edit the order. For details, see <a href="https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Claim_and_cancel/Claim/Claim_order_items">View and edit an order</a></td>
</tr>
<tr>
<td>Order Number</td>
<td>Number assigned by system when order was created. Click the <strong>Order #</strong> to edit the order. For details, see <a href="https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Claim_and_cancel/Claim/Claim_order_items">View and edit an order</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancelled</td>
<td>Some copies canceled</td>
</tr>
<tr>
<td>Order Status</td>
<td>Copies have been requested to be canceled</td>
</tr>
<tr>
<td>Open</td>
<td>Order not placed</td>
</tr>
<tr>
<td>Ordered</td>
<td>Order placed</td>
</tr>
</tbody>
</table>

| Payment Amount   | Unit price. The amount is displayed in your institution's currency. |
### Purchasing Status

<table>
<thead>
<tr>
<th>PURCHASE STATUS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Item is not invoiced</td>
</tr>
<tr>
<td>Invoiced</td>
<td>Item is invoiced</td>
</tr>
<tr>
<td>Paid</td>
<td>Item is paid for</td>
</tr>
<tr>
<td>Partially Invoiced</td>
<td>Item is partially invoiced</td>
</tr>
<tr>
<td>Partially Paid</td>
<td>Item is partially paid for</td>
</tr>
</tbody>
</table>

### Renewal Setting

<table>
<thead>
<tr>
<th>SETTING</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renew</td>
<td>Subscription has been renewed</td>
</tr>
<tr>
<td>Do Not Renew (Canceled)</td>
<td>Subscription has been canceled</td>
</tr>
<tr>
<td>Do Not Renew (Waiting For Review)</td>
<td>Subscription must be reviewed before being renewed</td>
</tr>
</tbody>
</table>

### Renewals

Number of times the item has been renewed. Click the **number** in the column to view renewal history.

### Type

The item's material type, as determined in the WorldCat record. Place the cursor over the icon to see the text definition of the material type.

### Configure columns

You can choose the columns that appear.

1. On the left side of the screen, next to the Rows drop-down list, click the **Configure button**.
2. In the Show Columns window, check or uncheck the columns you want to show or hide.
3. The columns you checked or unchecked are shown or hidden.
4. Close the Show Columns window by clicking anywhere outside it.

**Download item data**

You can download the data on the screen as a comma-separated values (CSV) file. To download more data, increase the rows on the screen by using the Rows list.

1. On the lower left side of the screen, next to the Refresh icon, click the **Export button** (出口).

**Claim items**

If you have ordered an item, but not yet received it from the vendor, you can claim the item in the system. When you claim an item in WorldShare Acquisitions, you have the option of notifying the vendor about the claim. Claiming an item increases the number of claims attached to that item and records the date last claimed, which allows you to track previously claimed items.

1. On the left navigation, click **Orders**.
2. Click **Missing Order Items**.
3. On the Missing Order Items screen, find the items you want to claim. See [Find, filter, and search missing items](#) for details.
4. Select the **check boxes** next to the issues you want to claim. If you want to claim all items in the table, select the **check box** at the top of the table.
5. At the top of the screen, click **Claim**.
6. If you want to notify the vendor about the claim, go to the next step. If you do not want to notify the vendor about the claim, click **Claim Items** and go to step 12.
7. Select the **Notify vendor about this claim** check box.
8. Click **Continue**.
9. On the Notify Vendor about Claim window, fill in the fields:
   a. In the Method field, select the **method** you want to use to notify the vendor (print or email).
   b. In the To field, select the **vendor contact**. You can set a default method and vendor contact by editing the Acquisitions Settings in the vendor record. For more information, see [Acquisitions Settings](#).
   c. In the Reply to field, select the **library contact**. This is the person at your library who the vendor can contact about the cancellation.
      
      **Note:** The default is the first person, with Visible to All enabled, listed in the OCLC WorldCat registry for your library.
      
      i. **(Optional)** Change the Reply to contact.
         1. If you want to change the library contact, you can click **Change** to select a different contact person.
         2. Click the **Choose** field to search through all users. Use the text field to search for a **name**, or select a **name** from the list.
         3. Click a **name** in the list to make them the library contact.
   d. In the Comments field, enter any **comments** you want to send to the vendor. This field allows line breaks and links. Links will be rendered active in the message preview.
e. If you selected Print as the method:
   a. Click Continue.
   b. On the Print Preview window, click Print Claim.
   c. The claim / status inquiry prints. Go to Step 12.

f. If you selected Email (HTML) as the method:
   a. (Optional) Select the Preview email before sending check box to view the email before sending it to
      the vendor. Click Continue.
   b. Click Send Claim.

   g. A confirmation message appears and the items have been claimed in the system.