

## 9.1 PREPARING A CLAIM

You can prepare a claim for:

- expected serial issues for which the program has determined a delay in view of the expected receipt date but only if you record the receipt of issues using serials check-in and if orders are recorded in the COBISS3/Serials module
- expected serial issues for which you have indicated in the check-in that you want a claim to be prepared but only if orders are recorded in the COBISS3/Serials module
- a received document intended for advance payment; you can prepare a claim for either the document as a whole or for a document item
- a received invoice; you can prepare a claim for either the invoice as a whole or for an invoice item

Items newly claimed with the same supplier will be added to the same claim until this claim is submitted.



Tip:

*Claim data is not added to the holdings data.*

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### 9.1.1 Undelivered issues

Claims for expected serial issues that have not been delivered to the library within the expected delivery time are prepared in the **Claim for undelivered issues** class.

You can prepare claims separately, by different acquisition types, or together for all acquisition types.

The program will find the items of orders and of lists of unsolicited publications with elapsed claim time limit in view of:

- the date of last claim
- the date of expected receipt of the issue

All the items found will be automatically placed on a claim for undelivered issues.

The issues for which you indicate, while performing the check-in, that you wish to be claimed will also be placed on the claim. If you indicate, while performing the check-in, that you wish to stop the claim, the issues will not be placed on the claim.



Note:

*You can prepare a claim for expected serial issues only if you record the receipt of issues using serials check-in and if orders are recorded in the COBISS3/Serials module.*

### **Procedure**

1. Highlight either the **Order** class or the **List of unsolicited publications** class.
2. Select the **Class / Prepare claims for undelivered issues** method.  
A window with a list of acquisition types will open.
3. Select the acquisition type (one, more or all) for which you wish to prepare claims. You can choose all the acquisition types.
4. Enter the time period in which you expect the issues and for which you wish to prepare claims.
5. If you wish to prepare a claim for only one supplier, tick the “Claim for a particular supplier” checkbox.
6. Under “Execution time (dd.MM.yyy HH:mm:ss)”, set the date and time for a claim to be prepared. If the execution time is not set, claims will be prepared immediately.
7. Click the **OK** button.
8. If you tick the “Claim for a particular supplier” checkbox, the **Search – Partner** search window will open, where you can find and select a supplier. If a supplier in the search window is not selected and you click the **Close** button, claims for active suppliers with the role of “Supplier(S)” will be prepared.

A claim for undelivered issues is prepared for each supplier separately.

A number, which cannot be changed, will be assigned to the claim for undelivered issues. Claims are numbered automatically, in compliance with the setting of the counter for claims for undelivered issues (see chapter 11.3).

### **Status after preparing claims for undelivered issues**

Claim for undelivered issues

- entered

### **What to do next**

You can edit a claim and then you submit it and send it to the supplier.

## **9.1.1.1 Transferring items to another claim**

You can transfer items from a prepared claim either to another prepared claim or to a new claim.

### **Procedure**

1. In the **Claim for undelivered issues** class, find and select the claim.
2. Select the **Object / Move items** method.

A window containing a list of prepared claims will open.

If no claim has been prepared, the window will not open; instead, a new claim will be prepared.

3. Select the claim and click the **OK** button.

A window with a list of items placed on the selected claim will open.

4. Select the item(s) and click the **OK** button.

The **Claim for undelivered issues** editor will open.

5. Click the **OK** button.

*Status after  
transferring items to  
another claim*

Claim for undelivered issues

- entered

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## 9.1.2 Received request for advance payment or received invoice

Claims for received requests for advance payment or for received invoices are prepared either in the **Advance** class or in the **Invoice** class.

You can prepare a claim for either:

- a document as a whole, or
- individual items of a document

Enter the discrepancies and the reasons for claim when preparing an advance payment or invoice (see chapter 3.6.1 or chapter 3.7.1).

*Procedure*

1. In the **Advance** class or in the **Invoice** class, find and select the advance payment or the invoice.
2. Select the **Object / Close/prepare claim** method.

The items that are being claimed will be placed on the claim. If you prepare a claim for the document as a whole, individual items do not appear on the claim.

A number, which cannot be changed, will be assigned to the claim. Claims are numbered automatically, in compliance with the setting of the counter for invoice claims (see chapter 10.3).

*Status after  
preparing a claim for  
received request for  
advanced payment or  
received invoice*

Advance or invoice

- claimed

*What to do next*

Submit the claim and send it to the supplier.