Claim serial issues

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Discover how to search, view, and claim missing serial issues in WorldShare Acquisitions. Use the Missing Serial Issues screen to claim, stop claiming, and restart claiming for issues that you have not received. If you want to claim a missing serial subscription, use the Missing Order Items screen and change the Acquisition Type filter to Subscription.

Note: You can also automate serial issues claiming.

Find, filter, and search serial issues

Note: You can save serial issues searches for your own use or for use by other staff. See Saved searches.

Search for missing serial issues

2. Click Search to view all missing serial issues.
   Or
   From the drop-down list, select an index and enter the search term(s). Click Search.
3. On the Missing Serial Issues screen, enter your search terms into the Search by title search box.
4. Click outside of the search box or press <Enter>.
5. Your results will appear in the table.
Use the filters to find missing serial issues

1. On the left navigation, click **Serial Issues > Missing Issues**.
2. Click **Search** to view all missing serial issues.
   Or
   From the drop-down list, select an **index** and enter the **search term(s)**. Click **Search**.
3. On the Missing Serial Issues screen, at the top of the table, click the **filter name**.
4. 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.
5. Click **Apply**. Once the filter is applied, you can hover over the filter name at the top of the table to view the selected values.
6. **(Optional)** To remove the filter, click **Reset**.
7. Your results will appear in the table.

**Filter descriptions**

<table>
<thead>
<tr>
<th>FILTER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Claiming Status      | Available for claiming, archived for claiming (issues are archived after you stop claiming them)  
Note: By default, the list is filtered by available for claiming, which excludes issues previously archived for claiming. |
| Claims               | Number of times claimed. Range: from $n$ to $n$  
Examples  
"2 to 8" finds items that have been claimed twice to eight times.  
"0 to 0" finds first-time claims |
| Copies Received      | Number of copies received. Range: from $n$ to $n$  
Example  
"3-11" findsserials that you have received at least three, but not more than eleven, copies. |
<p>| Expected Release      | Date range: $n$ days ago |
| First Received       | Date range: $n$ days ago |</p>
<table>
<thead>
<tr>
<th>FILTER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note: You should assign a value to this filter if you only want to claim issues received by at least one other WMS library.</td>
<td></td>
</tr>
<tr>
<td>Last Claimed</td>
<td>Date range: $n$ days ago</td>
</tr>
</tbody>
</table>

**Descriptions of Publication Frequencies:**

<table>
<thead>
<tr>
<th>PUBLICATION FREQUENCY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual</td>
<td>Once per year</td>
</tr>
<tr>
<td>Bimonthly</td>
<td>Once every two months</td>
</tr>
<tr>
<td>Biweekly</td>
<td>Once every two weeks</td>
</tr>
<tr>
<td>Every 2 Years</td>
<td>Once every two years</td>
</tr>
<tr>
<td>Every 3 Years</td>
<td>Once every three years</td>
</tr>
<tr>
<td>Monthly</td>
<td>Once per month</td>
</tr>
<tr>
<td>Quarterly</td>
<td>Once every three months</td>
</tr>
<tr>
<td>Semiannual</td>
<td>Twice per year</td>
</tr>
<tr>
<td>Weekly</td>
<td>Once per week</td>
</tr>
<tr>
<td>3/Year</td>
<td>Three times per year</td>
</tr>
</tbody>
</table>

Note: This filter is useful when choosing the days from the Expected Release Date (e.g. you may want to wait longer to claim quarterly publications than monthly publications).

**Vendor**

To search for a vendor, enter the vendor name in the search box.
**Examples of combining filters to find items**

For all of the below, set the Claiming Status to **Available for Claiming** to exclude issues previously Archived for Claiming.

1. Issues that have not arrived in the expected time for that vendor
   a. Set the Claims filter to **0 claims** made.
   b. Set the Expected Release Date filter to the **desired number of days** (e.g., 5 days since Expected Release Date).

2. Issues that have not arrived and another library has already received them
   a. Set the Claims filter to **0 claims** made.
   b. Set the Expected Release Date filter to the **desired number of days** (e.g., 10 days since First Received Date).

3. Previously-claimed issues to claim again, because there has been no response in several days
   a. Set the Claims filter to **1 or more claims made**.
   b. Set the Last Claimed Date to the **desired number of days since last claimed** (e.g., 5 days since the item was last claimed).

4. Stop claiming issues because they have been claimed multiple times with no response from the vendor
   a. Set the Claims filter to **maximum claim limit** (e.g., 6 times).

**Claim serial issues**

If you have ordered a serial issue, but not yet received it from the vendor, you can claim the serial issue in the system. When you claim a serial issue in WorldShare Acquisitions, you have the option of notifying a vendor about the claim via email, a printed claim or an EDIFACT message via email or FTP. You can also notify multiple vendors of serial issue claims via email. If you need to claim a **one-time item**, you must claim it on the **Missing Order Items** screen. See [Claim order items](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Serial_issues/Claim_serial_issues) for more information.

1. On the left navigation, click **Serial Issues > Missing Issues**.
2. Click **Search** to view all missing serial issues.
   Or
   From the drop-down list, select an **index** and enter the **search term(s)**. Click **Search**.
3. On the Missing Serial Issues screen, find the items you want to claim. See [Find, filter, and search serial issues](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Serial_issues/Claim_serial_issues) for details.
4. Select the **check boxes** next to the issues you want to claim. If you want to claim all issues 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 11.
7. Select the **Notify vendor about this claim** check box.
8. Click **Continue**.
   ◦ If a single vendor is related to the selected issues, the vendor will be pre-filled for you automatically based on the most recent subscription order item in Acquisitions. Email or printed claims can be used to notify a single
vendor.
Note: If either of the below is missing, you will receive an error message.

- There must be a valid email address for the vendor if sending by print or email.
- If any of the issues do not have a vendor, you will not be able to submit the claim message to the vendor.
- If multiple vendors are related to the selected issues, this will be indicated in the dialog. Email is the required method for notifying multiple vendors.
Note: If either of the below is missing, you will receive an error message.

- There must be a valid email address for every vendor.
- If any of the issues do not have a vendor, you will not be able to submit the claim message to the vendors.
- In order to claim serial issues via an FTP or email EDIFACT message, you must first configure your vendor so that they are set up to receive EDIFACT messages. For more information, see Configure EDIFACT messages for a vendor.
Note: If your vendor is not configured to receive EDIFACT messages, you will receive an error message.

9. In the Notify Vendor about Order window, fill in the following fields:
   a. **Method** - The method you choose to notify the vendor of the order.
      i. **FTP (EDIFACT)**: Send an EDIFACT order message via FTP.
      ii. **E-Mail (EDIFACT)**: Send an EDIFACT order message via email.
      iii. **E-Mail (HTML)**: Send your order via email.
      iv. **Print**: Print your order to send via mail.
   b. **FTP Profile** - The FTP profile you'd like to use to send the message, if you are sending by FTP (EDIFACT).
   c. **To** - The person at the vendor who will receive your notification of an order, if you are sending by Print or E-Mail (EDIFACT or HTML)
   d. **Reply to** - The person at your library that the vendor can contact about your order, if you are sending by Print or E-Mail (HTML).
      - The default is the first person listed on the Contacts page in OCLC Service Configuration (WorldCat Registry > Contacts).
      - You can set a recurring contact for when vendors reply to an order in the Institution Settings for your system. For more information, see Create a recurring reply-to 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.

10. The method you choose determines the next step.
    a. **Email (EDIFACT and HTML) and FTP (EDIFACT)**
       i. (Optional) To preview the message, select **Preview message before sending** and then click **Continue**.
       ii. Click **Send Order**.
    b. **Print**
       i. Click **Continue**.
       ii. From the Print Preview dialog, click **Print Order**.

11. A confirmation message appears and the items have been claimed in the system.
Stop and restart claiming

Stop claiming: Follow local practice to determine how to handle a vendor not supplying claimed issues

Restart claiming: Only available if an issue is archived for claiming (when you stop claiming an issue, it is archived for claiming)

1. On the left navigation, click **Serial Issues > Missing Serial Issues**.
2. On the Missing Serial Issues screen, search for the titles you want to stop or restart claiming. See [Find serial issues](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Serial_issues/Claim_serial_issues) for details.
3. Select the **check boxes** next to the titles you want to claim. If you want to claim all titles in the tables, select the **check box** at the top of the table.
4. At the top of the screen, click **Stop Claiming** or **Restart Claiming**.
5. The screen refreshes and the title’s Claiming Status is updated. If you stopped claiming a title, it will be archived for claiming.

Watch a video

Claim missing serials issues (7:05)

This video shows how to claim missing serials issues in WorldShare Acquisitions.

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