
What are the fundamental setup steps for Voyager® Acquisitions?

- **Article Type:** Q&A
 - **Product:** Voyager
 - **Product Version:** All
 - **Relevant for Installation Type:** Dedicated-Direct; Direct; Local; Total Care
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Question

We have not used Acquisitions and would like to start; how do we set it up?

Answer

Voyager contains extensive functionality for managing Acquisitions activity. Depending on which activities the module will be used for, the following provides a good starting point:

A. System Administration Set-up

1. Define Fiscal Period (must have at least one Fiscal Period that is current)
2. Define Fund Types
3. Define Vendor Types
4. Define Mark Reasons
5. Define Claim Types

B. Set-up in Acquisitions

1. Create Ledger. Must create at least one Allocated Fund.
 2. Create Vendor record for each vendor you will be working with.
- Once a Ledger and Vendor is created, you can then begin to create PO's and Invoices.

For Serials Check-In:

1. You will have a set of Publication Patterns included with your load of Voyager. For any serials that do not fall into the provided Publication Patterns, you will need to create your own.
2. Must have a PO with a line item that has a line item type= Membership, Standing Order, Blanket Order, or Multi-Part. From the Type tab in the line item, create a Component. Once the Component is created, link it to a Publication Pattern.
3. See the FAQ in eService's Knowledge Base called "Basic instructions on how to set up for serials check in" for detailed instructions.

C. Server Activity for Problems and Claims

1. Must run Pacqjob -1 to get System Claims/Cancel. This can be run via the server (from /m1/voyager/xxxdb/sbin) or via WebAdmin.

Category: Acquisitions

Subject: Configuration

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