Voyager Acquisitions

An integrated library system at last
History of Acquisitions Systems

- **Pre 1985 – paper ledger**
- **1985 – 2001 IBM System 36**
  - Bi-monthly paper reports
  - No relation to bibliographic record in the catalog
  - Slow payment processing
- **2001-2003 Innovative interfaces**
  - Electronic processing of invoices
  - More promptly paid invoices
  - More access to more information to more people
What I want to talk about today

- Changes regarding vendor
- Fund changes and new types of funds
- What won’t change
- Fund manager statements
Vendor changes
July, 2003

Live with Voyager Acquisitions and
Live on the campus with Banner, the new system that is replacing UFUS
Differences between UFAS and Banner

- With UFAS, every time we paid a vendor, we sent vendor information (FEIN or Tax ID #, vendor name and address) to the campus. All of our vendor data was kept in house at the Library and nothing was stored at the campus level about our vendors.
There was no relationship between the vendors that we use and the vendors that UI- Chicago or UI-Springfield uses.
With Banner

- All vendor information for all three campuses is stored at the campus level in a combined, shared, vendor database that will be used by all campus departments.
What will the vendor changes mean to us?

- Must submit all new vendor requests to the campus.
- No new vendors can be used without FEIN number information.
- All vendor changes must be sent to the campus.
- Vendor info is shared by all depts.
Obviously, this will mean a more complex process. Acquisitions and the Library Business Office will be working together very closely on this process.
What you need to do

- If there is something, like a Rare Book, that is only available from one source, and we have not used the source before, Acquisitions needs to be notified right at the beginning so we can get the information needed from the vendor so that we don’t have payment problems down the line.
Fund changes
Current fund structure

- Monograph fund – mth0
- Mono-contin fund – mth4
- Contin fund – mth8
- Periodicals fund – mth9
- Gift and grant funds
By using different fields in the record, we can get statistics on how many CDs are purchased on the math monograph fund, for example.

With Voyager, that will not be possible
In Voyager, we’re going to need more funds

- In order to get the detailed statistics the Library needs, we are going to have to use the fund structure to help us get them.

- As a result, we will have better statistical data about what we’re buying than we’ve ever had before.
Currently, most all of our library materials accounts map to an object code used by the campus. The campus uses object codes to tell what types of materials we (UIUC) is buying. Most library materials accounts are mapped to one object code.
In our new integrated world

UIC and UIUC will use similar object codes so that we can get university wide reports on expenditures.
NOW

- All materials budget state funds map to one account number. So math, geology, english, africana, etc. purchases map to one university account number which is 1-2-21024-6600
In the new Banner world

- Object codes for different types of purchases
- Funds for different types of purchases
Types of Funds in Voyager

- Summary funds
- Allocated funds
- Reporting funds
Summary fund

- Highest level. Gathers together data from all funds below it. For example, Monograph expenditures might be a summary fund.
Characteristics of a Summary fund

- Don’t have allocations.
- Allow you to gather a summary of information about all of their subordinate funds.
- Analyzing fund activity at the summary fund level allows you to see the expenditure activities of all allocated and reporting funds associated with the summary fund.
Allocated funds

- Contain real money
- Can add to or subtract from it any time during the fiscal year.
Reporting funds

- Subordinate to allocated funds and do not have money in them
- Can be selected on purchase orders and invoices
- Money to pay for invoiced items comes from a reporting fund’s parent allocated funds
- Can generate detailed information about the expenditures from that allocated fund
Specific example

- **Periodicals** – Summary fund
  - Math periodicals – allocated fund
    - Math print periodicals – reporting fund
    - Math ejournals – reporting fund
    - Math microform serials – reporting fund
Possible types of Allocated funds

- Monographs
- Monographic contins
- Contins
- Periodicals
Possible types of Reporting funds

- Print serials
- E-journals
- CD rom serials
- AV Serials
- Microform Serials

- Print books
- E-books
- Serial back issues
- CD rom books
- CD rom databases
- Microform monographs
Acquisitions/Serials Implementation team members

- Janice Pilch – Slavic
- Tim Cole – Math
- Peggy Steele – Systems
- Stephanie Baker – Tech Services
- Susan Edwards – Library Business Office
- Tiffany Tsou – Library Business Office
- Lisa German – Acquisitions
What we’ll need fund managers to do

- Help map standing orders and open monograph orders as of July 1 to the appropriate new reporting fund.
What won’t change

- Current vendor codes won’t change
- Use same p.o. number for serials and open monographs that we use in III.
- If old p.o. number was in the III record, it’s being carried over to the order record in Voyager.
- New monographic orders should be placed, if possible by mid-April.
Fund manager statements

- Can still have printed fund statements
- Team (in person of Tim Cole) will survey fund managers to see if print fund statements still wanted and if so, what kind of information in what layout is preferred. End result will of course be a compromise based on responses
More to come

- Presentation at the Faculty meeting
- Communications via the Navigator
- Discussions at Collection Development Committee
- Informal discussions
Thank you very much!