Claims and Cancellations for Monographs

Claims & Cancellations (Monographs)

Rush claims/cancellations

- Report run weekly for orders between 14-30 days old, with location "ON-ORDER" and the word "Hold" in the order notes field
- Report emailed to Monograph Unit Specialist, A&D Associate Head (Monographs) and Dawn Pearce
- SIRSI report: Acquisitions Custom tab; "List ON-ORDER items with a hold note"
- Monograph Unit Specialist will triage these orders, claiming or canceling & ordering with a different vendor as needed

Claims/Cancellations

- Monograph Unit staff checks the DPP Fund Statistics database (G:\Acquisitions & Discovery\Financials\Production Database\Fund Statistics - Monographs)
  - 2 reports: Not Received after 30 days; Not Received after 90 days
- YBP/GOBI sends Mono Unit Specialist and acq-monographs email a report of open orders every 2 weeks
- Reports stored at G:\Acquisitions & Discovery\Monographs Unit\Reports\YBP OPEN ORDER XXX
- Any titles on the YBP list that are canceled are forwarded to the Mono Unit Staff.
- Orders that have been paid, but item has not been received are forwarded to Mono Unit Specialist for claiming
- Orders that have not been filled after 90 days are canceled. Mono Unit Staff will attempt to reorder from an alternate vendor

GOBI Cancellation Procedures

GOBI may cancel an order if the supplier cannot provide the book, or if the order is not filled within 90 days, GOBI automatically cancels the order.

- Mono Unit Staff will cancel the YBP PO in Sirsi.
  - add note "YBP order canceled per library cancellation policy, date & initials" to the orderline
- Mono Unit Staff will try to order item from another vendor.
  - Item may be reordered as long as item is not more than 30% more than original order price.
  - Contact collection manager for review if no in stock vendor found, or if price is more than 30% of original
  - End of FY special instructions: notify the Head of Collections & Research Strategy about items not able to be ordered from YBP within 60 days of the end of the FY
- If item cannot be reordered in Gobi
  - In the order record, click on the segments tab and add cancellation, check "cancel all fundings" and the fund id, then click "OK"
  - Item type and Home location = CANCELLED (these two steps are not necessary if the order is placed with another vendor)
  - Discharge the item from "ONORDER"

Additional GOBI information (per YBP representative)

- if a book is non-cancel/non-return, technically you cannot cancel it or return it (unless defective) for any reason.
- if not filled in 90 days it will auto cancel, this is for orders that are/were in stock or did not fill in 90 days but not NR/NC items.
- if it is marked Non Cancel, it has to be discussed with the vendor, however the majority of all cancellations after 90 days we do take back.
- if the book has not been shipped and it has been 3 months, the vendor/publisher takes that into consideration for cancellation. Canceling after 15 days, they will probably say no
- Caution should be used when purchasing books that are non-cancel/non-return. If it is not the correct book and received in 30 days, we may not be able to take it back.
- ebooks are NOT RETURNABLE at any time, but there are exceptions there too, but always up to the vendor/publisher.
- About Stock/In stock, NYP (not yet published), Out of stock, Orders accepted:
  - Gobi is at the mercy of the electronic feeds received daily. If a publisher says it is in stock it can mean:
    - They have many copies in stock
    - They have 5 copies in stock
    - Occasionally vendors do not update their stock
- "Orders accepted" can mean Gobi close to receiving copies so they will take our order, or it could mean when the vendor gets 50 orders they will order more to be printed.

Single vendor Cancellation Procedures

Single vendor orders older than 90 days, NCSU libraries will cancel the order & attempt to order from another vendor

- Mono Unit Staff will cancel the original Vendor order.
- Mono Unit Staff will try to order item from another vendor.
- Item may be reordered as long as item is not more than 30% more than original order price, or near the close of the FY.
• Contact collection manager for review if no in-stock vendor found, or if price is more than 30% of original

• When purchasing a new item:

  • If item was Cancelled with Gobi, but can be reordered from a single vendor
    • Create new PO
    • Add orderline stating the “original order canceled with Gobi, reordered with "vendor"” initial and date.
    • Update item record if previously changed to CANCELLED – Note: there is no need to add an additional item to the bib record.

  • If item was canceled with single vendor, but can be reordered.
    • Modify the original PO with the current vendor, order number, and price.
    • Add to the existing orderline note: “Order canceled with vendor and reordered with new vendor”.
    • initial and date

  • If item cannot be reordered (not in stock, vendor price too high, or cannot be located )
    • Notify collection manager
    • CANCEL the PO Segments in Sirsi
    • Change Item Type and Home Location to CANCELLED
    • Discharge the item from ONORDER.
      • If purchase was an added copy, Delete the item completely from the Bib record.

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**Single vendor Claiming**

Occasionally books do not show up. Check the title in Sirsi for additional record/item or PO that title could have been received, before contacting vendor

In Amazon – go to online order details for title in question. Was it shipped? Is there tracking?
Check Acq-monographs for order and/or shipping confirmations.

Not shipped? Contact Amazon / Seller (usually Marketplace seller) by email or call Amazon customer service 866-486-2360 account = NCSU LIBRARIES ACQ DEPT

This book “title” was ordered on “date” and has not been shipped. Would you please check on this order?

Shipped? Yes Tracking? No
Contact Amazon / Seller

This “Item” was ordered “date” and has not been received. Tracking is not available. Would you please check on this order?__

Shipped? Yes Tracking information, but not showing delivered
Contact Amazon / Seller

This “Item” was ordered “date” and has not been received. Tracking does not indicate delivery. Would you please check on this order?__

Shipped? Yes: tracking shows delivered

Send out a search email to the department. Do additional searching in Sirsi. Sometimes detective work pays off.

If not found, and we were charged, print invoice and pay/receive in Sirsi. Add PO orderline that the book arrived but went missing. Charge item record to MISSING.

Contact Selector as an FYI

Other vendors can be handled in the same way, starting with original emails in acq-monographs.
Phone calls can be very helpful in this instance.