



The State University of New York

Claims Processing Within the Acquisitions Workflow

February 20, 2020

SUNY Library Shared Services
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www.suny.edu





The State University
of New York



Roles needed for claims processing:

**Purchasing Operator
(or)
Purchasing Manager**



Claims processing applies to:

Print orders (and) print items

When arrival/receiving does not occur

Electronic orders

When activation does not occur



Claims and notifications are managed via a **daily job**

Monitor Jobs Cancel

PO Line - Claiming

Scheduled Running History

1 - 20 of 20 Name Refresh

Job Category: All Status: All Submit Date Range

Name	Job ID	Job Category	Operator	Submit Date	Start Date	End Date	Status	
1 PO Line - Claiming	1774231060004805	Acquisition	System	02/09/2020 05:00:01 EST	02/09/2020 05:00:01 EST	02/09/2020 05:01:08 EST	Completed Successfully	...
2 PO Line - Claiming	1763347290004805	Acquisition	System	02/08/2020 05:00:05 EST	02/08/2020 05:00:05 EST	02/08/2020 05:02:09 EST	Completed Successfully	...
3 PO Line - Claiming	1751805600004805	Acquisition	System	02/07/2020 05:00:03 EST	02/07/2020 05:00:04 EST	02/07/2020 05:02:10 EST	Completed Successfully	...
4 PO Line - Claiming	1740802970004805	Acquisition	System	02/06/2020 05:00:02 EST	02/06/2020 05:00:03 EST	02/06/2020 05:01:58 EST	Completed Successfully	...
5 PO Line - Claiming	1729885470004805	Acquisition	System	02/05/2020 05:00:07 EST	02/05/2020 05:02:55 EST	02/05/2020 05:03:22 EST	Completed Successfully	...
6 PO Line - Claiming	1718843140004805	Acquisition	System	02/04/2020 05:00:15 EST	02/04/2020 05:01:11 EST	02/04/2020 05:04:32 EST	Completed Successfully	...
7 PO Line - Claiming	1707879840004805	Acquisition	System	02/03/2020 05:00:02 EST	02/03/2020 05:01:26 EST	02/03/2020 05:02:03 EST	Completed Successfully	...
8 PO Line - Claiming	1697030040004805	Acquisition	System	02/02/2020 05:00:02 EST	02/02/2020 05:00:06 EST	02/02/2020 05:01:11 EST	Completed Successfully	...
9 PO Line - Claiming	1683319900004805	Acquisition	System	02/01/2020 05:00:04 EST	02/01/2020 05:00:04 EST	02/01/2020 05:01:53 EST	Completed Successfully	...



Claims and notifications are managed via a **daily job**

Monitor Jobs

Scheduled Running History

PO Line – Claiming When active!

1 - 13 of 13




Filter: Acquisition

	Active	Name	Job Category	Creator	Schedule	Next Run	
1	<input checked="" type="checkbox"/>	PO Line - Packaging	Acquisition	800580226	Every day at 17:00	02/20/2020 05:00:00 EST	...
2	<input checked="" type="checkbox"/>	PO Line - Renewal	Acquisition	-	Every day at 22:00	02/19/2020 10:00:00 EST	...
3	<input type="checkbox"/>	PO_LINE_CLAIMS_JOB	Acquisition	-	Every day at 05:00	02/20/2020 05:00:00 EST	...
4	<input type="checkbox"/>	Trials - Start and Notify Participants	Acquisition	-	Every day at 24:00	02/20/2020 12:00:00 EST	...
5	<input type="checkbox"/>	PO Line - Deferred	Acquisition	-	Every day at 23:00	02/19/2020 11:00:00 EST	...
6	<input type="checkbox"/>	Recalculate transactions exchange rates	Acquisition	-	Every Monday at 02:00	02/24/2020 02:00:00 EST	...
7	<input type="checkbox"/>	PDA- Alert pda reached threshold	Acquisition	-	Every day at 04:00	02/20/2020 04:00:00 EST	...
8	<input type="checkbox"/>	Recalculate PO line encumbrances based on current exchange rates	Acquisition	-	Every Saturday at 02:00	02/22/2020 02:00:00 EST	...
9	<input checked="" type="checkbox"/>	Notify E-Activation due task	Acquisition	-	Every day at 04:00	02/20/2020 04:00:00 EST	...
10	<input checked="" type="checkbox"/>	Sushi harvesting job	Acquisition	800580226	Every Saturday at 04:00	02/22/2020 04:00:00 EST	...
11	<input type="checkbox"/>	CCC synchronize	Acquisition	-	Every day at 24:00	02/20/2020 12:00:00 EST	...
12	<input checked="" type="checkbox"/>	PO Line - Claiming	Acquisition	-	Every day at 05:00	02/20/2020 05:00:00 EST	...
13	<input checked="" type="checkbox"/>	PO Line - Delete interested users	Acquisition	-	Every Tuesday at 04:00	02/25/2020 04:00:00 EST	...




Claims and notifications are managed via a **daily job**


Job Report Back

 **PO Line - Claiming**  

Completed Successfully	Process ID 1774231060004805	Started on 02/09/2020 05:00:01 EST
	Finished on 02/09/2020 05:01:08 EST	Total run time 1 Minutes 6 Seconds
	Status Completed Successfully	Status date 02/09/2020 05:01:08 EST
	Records processed 2	Records with exceptions 0

Statistics 

Records skipped **0**

Errors 

Records with exceptions **0**

[no analytics]




 **All blues / by Miles Davis ; arranged by Mike Tomaro., Milwaukee, Wis. :, Hal Leonard, ©2010., Hal Leonard little big band,** Edit Change Expected Date ...

MMS ID: 998183053604805 **Copies:** Drake Memorial Library - Books (Top Floor) (1)
Assigned to: - **Total price:** 42.75 USD
Type: Physical - One Time **Funds:** ONE-TIME ORDERS (100.0%) (2019-2020)
PO line owner: Drake Memorial Library **Vendor/Account:** ejazzlines.com / Default Account - 1236 1236
Standard number: - **Vendor reference ID:** -
PO: PO-55405 **Expected delivery:** 01/29/2020
PO line: POL-2459 / (Sent)

Physical One Time (1) One Time Claiming Information (1) **Receiving note:** -
Sent date: 01/29/2020
 0 Items were received out of 1 ordered, Overdue PO line, The bib record is part of a series/book set

[Expands for more detail](#)

 **ARTnews., Artnews Associates etc, Feb. 17, 1923-, 0004-3273, ISSN** Edit Change Expected Date ...

MMS ID: 990000065370204805 **Copies:** Drake Memorial Library - Periodicals (Ground Floor) (1)
Assigned to: - **Total price:** 45.10 USD
Type: Print Journal - Subscription **Funds:** CONTINUING ORDERS (100.0%) (2019-2020)
PO line owner: Drake Memorial Library **Vendor/Account:** LM Information Delivery / Default Account - WOLPER WOLPER
Standard number: 0004-3273 **Vendor reference ID:** 315542
PO: 23353-BRO50 **Expected delivery:** 01/01/2020
PO line: 23353 / (Waiting for Manual Renewal)

Physical Continuous (1) Continuous Claiming Information (1) **Renewal date:** 05/31/2020
Receiving note: 8857: Bind yearly / published quarterly
Sent date: 07/15/2009
 No item was received in more than 30 days., Overdue PO line, At least one of the reporting codes is missing

[Expands for more detail](#)

TYPES OF ALERTS – also in Alerts tab

- **Overdue PO line**
- **Open claims exist for this PO line**
- **<x> items were received out of <y> ordered (for one-time physical PO lines)**
- **No item was received in more than <grace period> days (for continuous physical PO lines)**
- **Electronic resource was not activated (for electronic PO lines)**

New! February 2020 release

Improved Claiming Functionality for Continuous PO Lines

February 2020
Acquisitions Idea Exchange

Previously, if an item's due date arrived and the item was not received, a claim letter was sent to the vendor.

Now, if the next expected item also does not arrive, you can send an additional letter to the vendor which includes details for both items which did not arrive. This function is enabled when the **claim_continuous_item_level** parameter is set to true.

See [Configuring Other Settings \(Acquisitions\)](#).

[Release notes](#)



Configuring

SUNY Brockport

Filter List

Look-up or select **Institution level**

- Acquisitions
- Resources
- Discovery
- Fulfillment
- User Management
- General
- Analytics

- Purchase Orders**
 - Reporting Codes
 - Secondary Reporting Codes
 - Tertiary Reporting Codes
 - Purchasing Review Rules
 - Shipping Method
 - PO Line Cancellation Reasons
 - PO Line Types
 - PO Line Deferral Reasons
 - Acquisition Method
 - EDI Vendor Note Fields
- Invoices**
 - Invoice Review Rules
 - Invoice Approval Rules
 - Disapproval Reasons
 - VAT Codes
 - Payment Method
 - Invoice Line Types
- Licenses**
 - Sections Order
 - Manage License Terms
 - License Storage Location
 - Access Model
 - License Review Status
 - Discovery Interface Labels Customized
 - License Term Controlled Vocabulary
- General**
 - Other Settings
 - Currency Subset
 - Fund and Ledger Fiscal Period
 - Receiving Department Validations
 - Fund Types
 - Acquisition Jobs Configuration
 - Subscribers
 - Purchase Request Reject Reasons
 - Legal Deposit Reports
 - Survey Question Multiple Choice

Mapping Table

Customer Parameters

Table Description: Customer Parameters
Customization mode: Specific rows can be customized

	parameter key	parameter module	parameter value	free text description	Managed in Network	Updated By	Last Updated	
1	acq_distribute_changes_last_run	acquisition		Last run time of the job		-	-	...
2	acq_distribute_changes_last_run_license	acquisition		Last run time of the job for licens		-	-	...
3	acq_distribution_job	acquisition	false			-	-	...
4	acq_use_vendor_account_email	acquisition	false			-	-	...
5	acquisition_accrual_mode	acquisition	false			exl_impl	10/23/2018	...
6	assertion_over_po_line_price	acquisition	10000			exl_impl	10/23/2018	...
7	auto_claim	acquisition	N	Send Claim notification to vendor		exl_impl	10/26/2018	...
8	auto_claim_co	acquisition	N	Send Claim notification to vendor		-	-	...
9	auto_claim_electronic	acquisition	N	Send Claim notification to vendor		-	-	...
10	claim_continuous_item_level	acquisition	false	When true the Claim for continous		-	-	...

In the Tasks list --

Order lines with claims





The State University
of New York



To call up the Claim page:

Acquisitions -->

Purchase Order Lines -->

Claim






Normal search options apply

Faceted to:
Print Book – One Time
Reporting Code -
Print Books

★ >> Acquisitions Resources Discovery Fulfillment Admin Analytics

< Claim (1 - 3 of 3) Back Change Expected Date

Select All Purchase Type : **Print Book - One Time** Reporting Code : **Print Books**

1 <input type="checkbox"/>	 Collecting data in animal investigations / Diana Noonan., Mankato, Minn. :, Capstone Press, ©2011., 9781429652377, ISBN MMS ID: 990008019830204805 Assigned to: - Type: Print Book - One Time PO line owner: Drake Memorial Library Standard number: 9781429652377 PO: 64742-BRO50 PO line: 64742 / (Sent)	Copies: Drake Memorial Library - Juvenile Collection (Ground Floor) (1) Total price: 26.65 USD Funds: ROLL DUMMY (100.0%) (FY-2019) Vendor/Account: Cou tts Library Service ++ / Account (M) - 82005 (P052521 82005 (P052521 Vendor reference ID: - Expected delivery: 06/09/2018	Receiving note: - Sent date: 05/10/2018 The bib record is brief, 0 Items were received out of 1 ordered, Overdue PO line, At least one of the reporting codes is missing	Edit Change Expected Date ...
Physical One Time (1) One Time Claiming Information (1)				
2 <input type="checkbox"/>	 Moment of reckoning : imagined death and its consequences in late ancient Christianity / Ellen Muehlberger., New York, NY :, Oxford University Press,, 2019, 9780190459161, ISBN MMS ID: 998124455004805 Assigned to: - Type: Print Book - One Time PO line owner: Drake Memorial Library Standard number: 9780190459161 PO: PO-3415 PO line: POL-1893 / (Sent)	Copies: Drake Memorial Library - Books (Top Floor) (1) Total price: 94.05 USD Funds: ONE-TIME ORDERS (100.0%) (2019-2020) Vendor/Account: Complete Book and Media Supply LLC / Default Account - COMPLETE COMPLETE Vendor reference ID: - Expected delivery: 08/01/2019	Receiving note: Hold for Katherine Clark kclark@brockport.edu Sent date: 08/01/2019 1 Items were received out of 1 ordered, Overdue PO line	Edit Change Expected Date ...
Physical One Time (1)				
3 <input type="checkbox"/>	 Outspoken women : an anthology of women's writing on sex, 1870-1969 / edited by Lesley A. Hall., London :, Routledge, 2005., 0415253713, ISBN MMS ID: 990007002300204805	Copies: Drake Memorial Library - Books (Top Floor) (1)	Receiving note:	Edit Change Expected Date ...

** Once the item is received, it will be removed from the Claims list.


Action: Change Expected Date (receipt or activation)


 **All blues / by Miles Davis ; arranged by Mike Tomaro., Milwaukee, Wis. ; Hal Leonard, ©2010., Hal Leonard little big band,** Edit Change Expected Date ...

MMS ID: 998183053604805 **Copies:** Drake Memorial Library - Books (Top Floor) (1) **Receiving note:** -
Assigned to: - **Total price:** 42.75 USD **Sent date:** 01/29/2020
Type: Physical - One Time **Funds:** ONE-TIME ORDERS (100.0%) (2019-2020) 0 Items were received out of 1 ordered, Overdue
PO line owner: Drake Memorial Library **Vendor/Account:** ejazzlines.com / Default Account - 1236 1236 PO line, The bib record is part of a series/book set
Standard number: - **Vendor reference ID:** -
PO: PO-55405 **Expected delivery:** 01/29/2020 

PO line: POL-2459 / (Sent)

Physical One Time (1) One Time Claiming Information (1)

 **All blues / by Miles Davis ; arranged by Mike Tomaro., Milwaukee, Wis. ; Hal Leonard, ©2010., Hal Leonard little big band,** Edit Change Bib Reference ...

MMS ID: 998183053604805 **Copies:** Drake Memorial Library - Books (Top Floor) (1) **Receiving note:** -
Assigned to: - **Total price:** 42.75 USD **Sent date:** 01/29/2020
Type: Physical - One Time **Funds:** ONE-TIME ORDERS (100.0%) (2019-2020) The bib record is part of a series/book set
PO line owner: Drake Memorial Library **Vendor/Account:** ejazzlines.com / Default Account - 1236 1236
Standard number: - **Vendor reference ID:** -
PO: PO-55405 / (Sent) **Expected delivery:** 03/01/2020 

PO line: POL-2459 / (Sent)

Physical One Time (1)


[Purchase Order Line Details](#)


All blues / by Miles Davis ; arranged by Mike Tomaro., Milwaukee, Wis. ; Hal Leonard, ©2010., Hal Leonard l... ? ▼

PO line	POL-2459	PO	PO-55405	Status	Sent (2020-01-29)
PO line type	Physical - One Time	PO line owner	Drake Memorial Library	Sent date	01/29/2020

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History Notes Attachments

1 - 1 of 1 Created by

Created On	Updated On	Updated By	Note
1 02/19/2020	02/19/2020	SUNY, SLC 	back order report 2/19/20



- Claim alerts applied to the POLs are removed.
- POLs no longer appear on the Claim page.
- POLs are removed from the "Order lines with claims" link in the task list.





How Claims are generated by Alma



From order details:
Vendor Information

SERIALS / PERIODICALS / Continuous physical PO lines

- Expected receipt after ordering (days)
- Subscription interval - If not using prediction patterns, when any item in the holding linked to this POL is received, the POL's Expected receipt date is then updated to that item's Receiving date + this value. [so it's the issue interval]
- Expected receipt date - You can manually override either of these two fields by setting a specific date. When you change this date, the Receiving dates of the items associated with this POL are changed.
- Claiming grace period (days) - This value is added to the Expected receipt date in any of the above cases. The POL is sent to claims after the grace period elapses: Expected receipt date + Claiming grace period. *Default is set at the vendor level.*
- If the email Claims Letter is enabled (and) the auto_claim_co parameter is (Y), then for vendors with defined email addresses, a notification is automatically emailed to the vendor. Notifications are configurable. If the vendor uses EDI, Alma will send an EDI claim instead of a claim letter.
- Otherwise, a notification is not sent automatically. You can email a notification manually.
- Reclaim Interval (days)



From item info

- Received date
- Expected receiving date – IF you are using prediction patterns. When there is a date in this field, the Expected receipt date of the POL is ignored. Just like the Expected receipt date in the POL, the POL is sent to claims after the grace period elapses: Expected receipt date (of the item) + Claiming grace period (of the POL).



Driven by Vendor Information & Defaults From the POL

[Purchase Order Line Details](#) Back

Summary | Description | Alerts | Invoice Lines | Associated PO Lines | Communications | Interested Users | History | Notes | Attachments

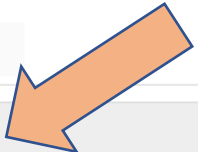
Ordered Items

Library	Location	Call Number	Copy ID	Summary	Number of Items
1 Drake Memorial Library	Periodicals (Ground Floor)	-	-	-	32

Receiving note **8857: Bind yearly / published quarterly** Routing during receiving **No** Binding during receiving **No**

Vendor Information

Material supplier	LM Information Delivery/WOLPER/Default Account - WOLPER/WOLPER	Claiming grace period (days)	0
Expected receipt after ordering (days)	0	Or expected receipt date	01/01/2020
Subscription interval	30	Reclaim Interval (days)	-



Editable fields -- per order

Driven by Vendor Information & Defaults From the vendor record

Vendor Details Cancel Save

LM Information Delivery i ▼

Vendor code WOLPER Institution SUNY Brockport

Summary Contact Information Contact People EDI Information Usage Data System Integration Invoices PO Lines Communications Attachments Notes Analytics

Vendor General Details ▼

Name * LM Information Delivery

Code * WOLPER Additional code

Financial Sys. code National tax ID

Status Active Liab. for VAT

Currencies USD × ☰ Language English ▼

Libraries SUNY Brockport × ▼

Vendor Type Material Supplier/Subscription Agent Access Provider Licensor Governmental

Accounts + Add 📄 ⚙️ ▼

Active	Account Code	Description	Discount Percent	Libraries
1 <input checked="" type="checkbox"/>	WOLPER	Default Account - WOLPER	0.0	SUNY Brockport ⋮



[well-hidden]

Driven by Vendor Information & Defaults From the vendor record

Vendor Account Details Cancel Save

LIV INFORMATION Delivery

Vendor code WOLPER Account description Default Account - WOLPER Account code WOLPER

Summary Contact Information Contact People

Account General Details

Institution -

Account description * Default Account - WOLPER Account code * WOLPER

Financial Sys. Account code Financial Sys. Account code

Status Active

Libraries * SUNY Brockport Account discount percent 0.0

Note

Payment Methods

Payment Methods * Attachment Accounting Department Credit card Prepayment Special payment Bank transfers Deposit account Cash

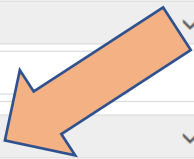
Delivery and Claim Information

Expected receipt after ordering (days) 0 Claiming grace period (days)

Expected invoice interval (days) Expected activation after ordering (days)

Renewal evaluation interval (days) Subscription grace period (days) 90

Reclaim Interval (days)



Applied to future orders



How Claims are generated by Alma

Electronic PO lines

Same calculations as for continuous POLs, except --

Expected activation date (and) Expected activation after ordering instead of
Expected receipt date (and) Expected receipt after ordering.

When Expected activation date + Claiming grace period arrives, and the POL
(either one-time or continuous) is still not activated, the POL is sent to claims.

Example: If the vendor is configured with Expected activation after ordering = 5 and Claiming
grace period = 2, then If the electronic resource is ordered on April 20, the POL goes into claims
on April 28.

April 20 + 5 days + 2 days grace = April 27; the resource is expected to be activated by the end of
April 27.





How Claims are generated by Alma

One-time physical PO lines

The same logic applies as for continuous PO lines:

If an Expected receipt date is defined for the POL, it overrides the date defined for the item.

Since it's a one-time order, there is no subscription interval and the Expected receipt date is not reset after the item is received.

After the grace period, a claim is sent automatically to the vendor (EDI or email), but only the first time this POL is sent to the Claims page.

If an operator updates the POL's expected receipt date, and the POL is sent to the Claims page again after the new date, another notification is not sent.

The parameter to enable email notifications for one-time physical POL claims is `auto_claim`.



Unfortunately....

**No claims process for standing orders
currently exists**

Alma Configuration

Configuring: SUNY Empire State College

Filter List: Look-up or select

- Acquisitions
- Resources
- Discovery
- Fulfillment
- User Management
- General
- Analytics

- Purchase Orders**
 - Reporting Codes
 - Secondary Reporting Codes
 - Tertiary Reporting Codes
 - Purchasing Review Rules
 - Shipping Method
 - PO Line Cancellation Reasons
 - PO Line Types
 - PO Line Deferral Reasons
 - Acquisition Method
 - EDI Vendor Note Fields
- Licenses**
 - Sections Order
 - Manage License Terms
 - License Storage Location
 - Access Model
 - License Review Status
 - Discovery Interface Labels Customized
 - License Term Controlled Vocabulary
- General**
 - Other Settings
 - Currency Subset

** Institution level

Managing notifications

[Documentation](#)

Customer Parameters

Table Description: Customer Parameters
 Customization mode: Specific rows can be customized

	parameter key	parameter module	parameter value	free text description	Managed in Network	Updated By	Last Updated	
1	acq_distribute_changes_last_run	acquisition		Last run time of the job		-	-	...
2	acq_distribute_changes_last_run_license	acquisition		Last run time of the job for licens		-	-	...
3	acq_distribution_job	acquisition	false			-	-	...
4	acq_use_vendor_account_email	acquisition	false			-	-	...
5	acquisition_accrual_mode	acquisition	false			exl_impl	10/23/2018	...
6	assertion_over_po_line_price	acquisition	10000			exl_impl	10/23/2018	...
7	auto_claim	acquisition	N	Send Claim notification to vendor		exl_impl	10/26/2018	...
8	auto_claim_co	acquisition	N	Send Claim notification to vendor		-	-	...
9	auto_claim_electronic	acquisition	N	Send Claim notification to vendor		-	-	...
10	claim_continuous_item_level	acquisition	false	When true the Claim for continous		-	-	...





If enabled, vendor notifications use the PO Line Claim Letter

Letters Configuration

Enabled	Letter	Description	Channel	Retention Period	Managed in Network	Customized	
<input checked="" type="checkbox"/>	Overlap and Collection Analysis Letter	Overlap and Collection Analysis Letter	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	Owner Subscription Letter	Owner Subscription Letter	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	Borrowing Activity Letter	Patron Circulation Summary	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	Full Pickup Print Slip Report Letter	Pickup Print Slip Report Letter	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	PIN Number Generation Letter	PIN Number Generation Letter	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	PO Line Cancellation Letter	PO Line Cancellation Letter	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	PO Line Claim Letter	PO Line Claim Letter	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	PO Line Renewal Letter	PO Line Renewal Letter	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	Interested Users In Letter	Print a notification that contains the interested users in a list	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	PDA Threshold Letter	Print a notification when the usage of the PDA amount resched the predefined threshold	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	Process Bib Export Finished Letter	Process Bib Export Finished Letter	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	Purchase Request Status Letter	Purchase Request Status Letter	EMAIL		-	✓	...
<input checked="" type="checkbox"/>	Query To Patron Letter	Query To Patron Letter	EMAIL		-	✓	...



Communicating with Vendors

- PERMISSIONS:** To communicate with vendors, you must have one of the following permissions:
- Purchasing Operator
 - Purchasing Manager
 - Vendor Manager

You can communicate with the vendor on the **Communications** tab of the vendor record.

- Sending a new email to the vendor
- Entering a response from the vendor
- Sending a reply to the vendor

Communication with the vendor from this tab are sent by email. You must have an email address configured for the vendor.

When working with claims, Alma automatically sends an email notification to the vendor when a PO line is claimed.

- The **auto_claim** parameter (for one-time physical PO lines) or the **auto_claim_co** parameter (for continuous physical PO lines) is set to **Y** (see [Configuring Other Settings](#)).
- The email PO Line Claims letter is enabled (see [Enabling/Disabling Letters](#)).
- The vendor's email address is configured.
- One day has elapsed since the Expected Receipt Date + Claiming grace period of a PO line (see [Processing Claims](#)) and the material has not been delivered by the vendor.





IF you have disabled automatic vendor notifications, it's possible to contact the vendor using the Communications tab in the POL Details

Communicating with Vendors

- PERMISSIONS:** To communicate with vendors, you must have one of the following roles:
- Purchasing Operator
 - Purchasing Manager
 - Vendor Manager

You can communicate with the vendor on the **Communications** tab of the PO Line Details page.

- Sending a new email to the vendor
- Entering a response from the vendor
- Sending a reply to the vendor

Communication with the vendor from this tab are sent by email. You must manually enter all information.

When working with claims, Alma automatically sends an email notification message to the vendor.

- The **auto_claim** parameter (for one-time physical PO lines) or the **auto_claim_co** parameter (for recurring PO lines) is enabled.
- The email PO Line Claims letter is enabled (see [Enabling/Disabling Letters](#)).
- The vendor's email address is configured.
- One day has elapsed since the Expected Receipt Date + Claiming grace period of a PO line (see [Processing Claims](#)) and the material has not been delivered by the vendor.

Purchase Order Line Details Back

Democrat and chronicle., Rochester Print Co, Vol. 52, no. 257 (Sept. 13, 1884)-, 1088-5153, ISSN i v

PO line 25799 PO 25799-BR050 Status Waiting for Manual Renewal (2019-06-03)
 PO line type Print Journal - Subscription PO line owner Drake Memorial Library Sent date 10/01/2009

Summary Description Alerts Invoice Lines Associated PO Lines **Communications** Interested Users History Notes Attachments

Ordered Items v

Library	Location	Call Number	Copy ID	Summary	Number of Items
1 Drake Memorial Library	Periodicals (Ground Floor)	-	-	-	0

Receiving note **Current issue to Cafe - Keep until mic arrives** Routing during receiving **No** Binding during receiving **No**

Vendor Information v

Material supplier	Democrat & Chronicle*/431/Default Account - 431/431	Claiming grace period (days)	0
Expected receipt after ordering (days)	0	Or expected receipt date	08/29/2019
Subscription interval	30	Reclaim Interval (days)	-





The State University
of New York

What's on your mind?

SUNY Library Shared Services

Susan Perry

Support Specialist

Susan.Perry@suny.edu

Alma: Welcome

Search this Guide

Search

Welcome

Acquisitions

Resources

Discovery

Fulfillment

Admin

Analytics

Collaborative Networks

Alma Digital

What's New Videos

User LibGuides

Ex Libris Google Search

Google Custom Se



Search the Ex Libris Knowledge Center, Developer Network, and Trust Center.

Useful Resources

- [Alma Community Listserv](#)
- [Alma Community Knowledge](#)
- [Alma Knowledge Center](#)
- [Alma Glossary](#)
- [Alma Essentials](#)
- [Alma Administration Certification](#)
- [Conference Presentations](#)

RELEASE
NOTES



Welcome to Alma



ExLibris
a ProQuest Company

DEVELOPER
NETWORK

Learn
Documentation

Build
My APIs

Share
Blog

Ask
Forum

Discover
App Center

NEW!



SLSS: Upcoming events

[Shared LSP Update](#) – Wednesday, Feb. 26, 2020 – 3 pm

[SLSS Alma & Primo VE Training](#)

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Thank you for attending today!

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