

Connecting the Dots: Building Blocks of Acquisitions Processes

Week 2 Session 4:
Purchase Orders and Purchase Order Lines
February 21, 2019

topics we'll be covering:

- what are PO and POLs and why are they important?
- how does the PO support the acquisitions workflow?
- how do funds and ledgers, and vendor records play a role in the POL?
- how to create a PO?
- how to create a template?

*The following roles are required in Alma to create PO and POLs:
Purchasing Operator or Purchasing Manager*

the order process simplified

Order → Receive or Activate → Invoicing



*(here is where the purchase
order (PO) and purchase
order line (POL) occur)*

the purchase order line requires the following elements:

- bib record
 - what is the library acquiring in exchange for payment?
- vendor record (material supplier)
 - which vendor is the library paying in exchange for resource?
- allocated fund
 - from which fund is the library paying for the resource?
- list price and quantity for pricing
 - how much is the library paying for the resource?

it actually starts with the bib record

the bib record may be in the NZ or CZ, depending on format, resource type, and purchase type

the bib record may instead have to be brought into the NZ from OCLC or require original cataloging and a brief or provisional record to get started

POL example: print book

All titles ▾ Title ▾ the secret life of cats X [Network] [Search] Advanced ▾

All Titles (1 - 20 of 31) the secret life of cats


Institution [Network] Community

Sort by : Rank ▾ Secondary Sort by : Rank ▾ Expand ▾ [Share] [Settings]

1 **The secret life of cats / Robert de Laroche, Jean-Michel Labat.** Edit Record **Order** ⋮

Book (Book - Physical) text; unmediated; volume By Laroche, Robert de. (Hauppauge, NY : Barron's ©1995.) **ISBN:** 0812065131 and others **Language:** English
Subject: Cats. Cats--Pictorial works. Cats--Folklore. and others **Record number:** ocm31754546-01suny_network **Update Date:** -

⌵ Electronic Digital **Held by (1)** Other details



[←](#) PO Line Owner and Type

Cancel

Create PO line

1 **The secret life of cats / Robert de Laroche, Jean-Michel Labat.****Book {Book - Physical} text; unmediated; volume** By Laroche, Robert de. (Hauppauge, NY : Barron's ©1995.)**ISBN:** 0812065131 and others**Subject:** Cats. Cats--Pictorial works. Cats--Folklore. and othersDescription * **The secret life of cats / Robert de Laroche, Jean-Michel Labat.**Purchase
type *

Print Book - One Time



this field is important

PO line
owner *

Milne Library

Load from
templateGenerate
barcode
using
sequenceAssign
inventory
manually

← Purchase Order Line Details



Delete

Cancel line

Relink

Defer

Order Now

Save

Back

Save and Continue

The secret life of cats / Robert de Laroche, Jean-Michel Labat., Hauppauge, N...



Order Line POL-145

Order -

Status In Review (2019-02-21)

Order line type Print Book - One Time

PO line owner Milne Library

Sent date -

Summary

Description

Alerts

Invoice Lines

Associated PO Lines

Communications

Interested Users

History

Notes

Attachments

Ordered Items

+ Add Location ▾



| Library | Location | Barcode | Receiving Date | Item Policy |
|-----------------|-------------------|---------|----------------|-------------|
| 1 Milne Library | Upper Level-MCIRC | - | - | - |



Receiving note

Routing during receiving

Vendor Information

Material supplier *



View vendor

Claiming grace period (days)

Expected receipt after ordering (days)

Or expected receipt date



Pricing

add a receiving note, or click the Edit button to change the location

Ordered Items

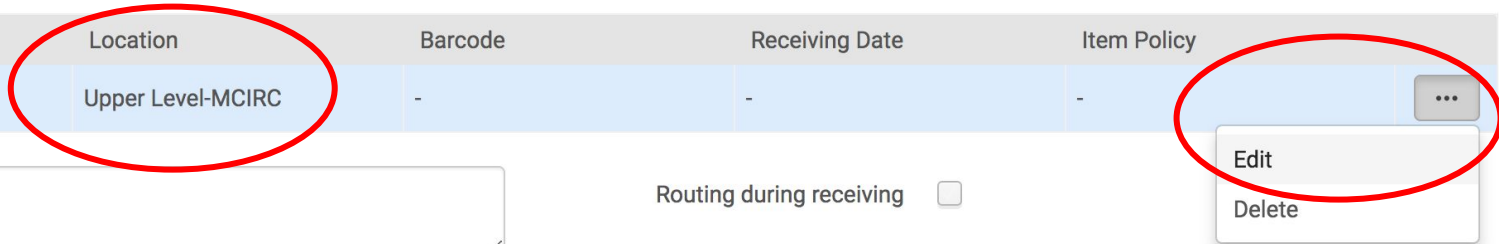

+ Add Location

| Library | Location | Barcode | Receiving Date | Item Policy | |
|-----------------|-------------------|---------|----------------|-------------|--|
| 1 Milne Library | Upper Level-MCIRC | - | - | - | |

Receiving note

Routing during receiving

Edit
Delete



physical item editor

if an incorrect bib record was used to initiate the order, use this button to select another bib record

Physical Item Editor

Relink to another bibliographic record Cancel Save

General ENUM/CHRON Notes History

General Information

| | | | |
|--------------------|--|-------------------------|----------------------|
| Barcode | <input type="text"/> | Copy ID | <input type="text"/> |
| Material type | <input type="text"/> | Item policy | <input type="text"/> |
| Provenance | <input type="text"/> | Is magnetic | <input type="text"/> |
| PO Line | POL-145 <input type="button" value="X"/> <input type="button" value="View Details"/> | Issue date | <input type="text"/> |
| Receiving date | <input type="text"/> | Expected receiving date | <input type="text"/> |
| Enumeration A | <input type="text"/> | Enumeration B | <input type="text"/> |
| Chronology I | <input type="text"/> | Chronology J | <input type="text"/> |
| Description | <input type="text"/> <input type="button" value="Generate"/> | | |
| Pages | <input type="text"/> | Pieces | <input type="text"/> |
| Replacement cost | <input type="text"/> | Receiving operator | <input type="text"/> |
| Physical condition | <input type="text"/> | | |
| Process type | <input type="text"/> | | |

Barcode:
the barcode can be entered at receiving

Material type:
This information can be added elsewhere in the POL

Item policy:
This information can be added here but can also be added to the record elsewhere

location information can be added or modified in the physical item editor

Inventory Number Information

Inventory number Inventory date

Inventory price

Location Information

Permanent location * **Milne Library: Upper Level-MCIRC (MCIRC)**

Alternative call number type Alternative call number

Source (Subfield 2)

Storage location ID

Temporary Location Information

Item is in temporary location No Yes

Temporary location **0 (not listed)**

Temporary call number type Temporary call number

Source (Subfield 2)

Temporary item policy Due back date

add a second copy and identify the location and item policy for that second copy by clicking “Add Location”

The screenshot shows a web interface for managing library items. At the top, there are buttons for 'Order Now', 'Save', 'Back', and 'Save and Continue'. Below this, a status bar indicates 'Status: In Review (2019-02-21)' and 'Sent date: -'. A navigation bar includes 'Interested Users', 'History', 'Notes', and 'Attachments'. At the bottom, a table with columns for 'Item Policy' and '...' is visible. A red box highlights the '+ Add Location' button and a gear icon in the bottom right corner of the table area.

The screenshot shows the 'Add Location' modal dialog box. It has a title bar with '+ Add Location' and a close button. The form contains three main sections: 'Number of items to add *' with a text input field containing '1'; 'Supported libraries' with a dropdown menu showing 'Acquisitions (ACQ)'; and 'Item policy' with an empty dropdown menu. A blue 'Add' button is at the bottom right. Three red arrows point to the input fields: the first points to the 'Number of items to add' field, the second points to the 'Supported libraries' dropdown, and the third points to the 'Item policy' dropdown.

material supplier (vendor) is a required field, along with the list price and quantity for pricing

| Library | Location | Barcode | Receiving Date | Item Policy |
|-----------------|-------------------|---------|----------------|-------------|
| 1 Milne Library | Upper Level-MCIRC | - | - | - |

Receiving note

Routing during receiving

Vendor Information

Material supplier * [View vendor](#)

Expected receipt after ordering (days)

Claiming grace period (days)

Or expected receipt date

Pricing

List price * USD

Quantity for pricing *

Net price **0.00 USD**

Discount (%)

at least one fund must be added

Vendor Information

Material supplier *

YANKEE BOOK PED



[View vendor](#)

Claiming grace
period (days)

Expected receipt
after ordering (days)

Or expected receipt
date



Pricing

List price *

25.00

USD

Net price

0.00 USD

Quantity for pricing *

1

Discount (%)

0.0

Funding

[+ Add Fund](#)



No records were found.

PO Line Details

the full cost of the purchase can be assigned to a single fund

The image shows a 'Funding' dialog box with the following fields and annotations:

- Fund ***: A dropdown menu is highlighted with a red oval.
- Percent**: A text input field containing '100.0' with a red arrow pointing to it from the left.
- Amount**: A text input field containing '25.00' and a currency selector set to 'USD'.
- Add Fund**: A blue button at the bottom right with a red arrow pointing to it from the left.

At the bottom left of the dialog, the word 'restriction' is partially visible.

the fund menu contains all allocated funds with available funds

if the selected allocated funds does not have sufficient funds to cover the list price, it will be rejected

if paying the entire cost with a single fund, use 100 percent

remember to click "Add Fund"

alternatively, it's possible to split the cost of the purchase across multiple funds

Funding

[+ Add Fund](#)

Fund *

Anthropology Anthropolo! X ☰ ↺

Percent

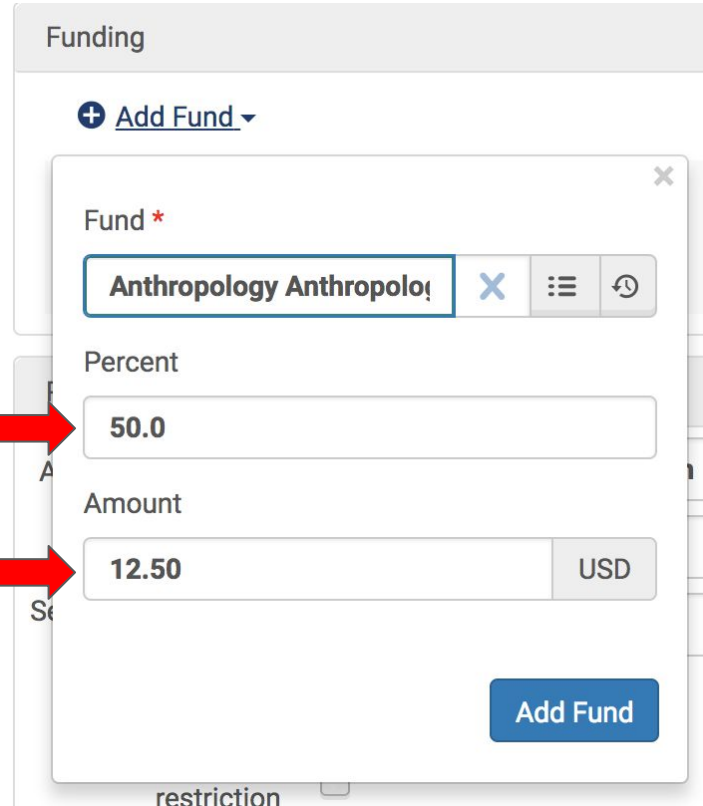
50.0

Amount


12.50 USD

[Add Fund](#)

restriction



Funding ▼

[+ Add Fund](#) Redistribute Lines 

| # | ▲ Fund Name | ↕ Fund Code | Percent | ↕ Amount | |
|---------|---|----------------------|---------|------------------------------------|--------------------|
| 1 - | Anthropology (FY-2019) (358.00 USD) | Anthropology (SS-SF) | 50.0% | <input type="text" value="12.50"/> | USD ⋮ |
| 2 - | Library (FY-2019) (2,321.00 USD) | Library (MULTI-SF) | 50.0% | <input type="text" value="12.50"/> | USD ⋮ |
| 3 Total | - | - | 100.0% | 25.00 USD | |

PQ Line Details ▼

Acquisition Method:

“Purchase at Vendor System” is the most likely Acquisition Method. This option tells Alma that the order and payment will be handled by the vendor system and not Alma. “Technical” allows the POL to be created without a fund or price.

Acquisition Methods can be customized:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/110Configuring_Acquisitions/090Configuring_the_Default_Acquisition_Method](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/110Configuring_Acquisitions/090Configuring_the_Default_Acquisition_Method)

PO Line Details ∨

| | | | |
|--------------------------|--|-------------------------------|--------------------------|
| Acquisition method | <input type="text" value="Look-up or select"/> | Material type | <input type="text"/> |
| Invoice status | Approval Plan | Reporting code | <input type="text"/> |
| Secondary reporting code | Depository | Tertiary reporting code | <input type="text"/> |
| Rush | Exchange | Manual packaging | <input type="checkbox"/> |
| Cancellation restriction | Gift | Cancellation restriction note | <input type="text"/> |
| Identifier | Purchase | Proposed identifier | <input type="text"/> |
| Vendor reference number | Technical | Vendor reference number type | <input type="text"/> |
| Note to vendor | Purchase at Vendor System | Vendor invoice number | - |

Additional >

Material Type comes up again in Analytics so it's not a bad idea to select an option.

| | |
|-------------------------------|--|
| Material type | <input type="text" value="Look-up or select"/> |
| Reporting code | Book |
| Tertiary reporting code | Book |
| Annual packaging | Issue |
| Cancellation restriction note | DVD |
| Proposed identifier | Compact Disc |
| Vendor reference number type | CD-ROM |
| Vendor invoice number | DVD-ROM |
| | Music Score |
| | Video cassette |
| | Audio cassette |
| | Manuscript |
| | Microfilm |
| | Microfiche |
| | Computer Disk |
| | Realia |

Reporting Codes:

- Up to three options
- Lots of potential to leverage reporting codes in Analytics
- Entirely configurable:
 - [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/110Configuring_Acquisitions/020Configuring_Reporting_Codes](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/110Configuring_Acquisitions/020Configuring_Reporting_Codes)
- Existing data migrated from Aleph

| | |
|-------------------------------|---|
| Reporting code | 🔍 Look-up or select |
| Tertiary reporting code | Manuscripts + Archives Collections^GENERAL (7020) |
| Manual packaging | Monographs^GENERAL (7030) |
| Cancellation restriction note | Print^Monographs (7031) |
| | Audio-Visual^Monographs (7035) |
| | Print^Serials (7051) |
| Proposed identifier | Postage (8700) |
| Vendor reference number type | |
| Vendor invoice | |

PO Line Details

| | | | |
|--------------------------|---------------------------|-------------------------------|--------------------------|
| Acquisition method | Purchase at Vendor System | Material type | Book |
| Invoice status | No invoice | Reporting code | |
| Secondary reporting code | | Tertiary reporting code | |
| Rush | <input type="checkbox"/> | Manual packaging | <input type="checkbox"/> |
| Cancellation restriction | <input type="checkbox"/> | Cancellation restriction note | |
| Identifier | 0812065131 | Proposed identifier | |
| Vendor reference number | | Vendor reference number type | |
| Note to vendor | | Vendor invoice number | - |

Manual packaging: Leave this box unchecked

Add any optional vendor or identifier information to facilitate local workflows.

← Purchase Order Line Details

- ⋮
- Delete
- Cancel line
- Relink
- Order Now
- Save
- Back
- Save and Continue

The secret life of cats / Robert de Laroche, Jean-Michel Labat., Hauppauge, N...



| | | | | | |
|------------------------|-----------------------|----------------------|---------------|------------------|------------------------|
| Order Line | POL-145 | Order | - | Status | In Review (2019-02-21) |
| Order line type | Print Book - One Time | PO line owner | Milne Library | Sent date | - |

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

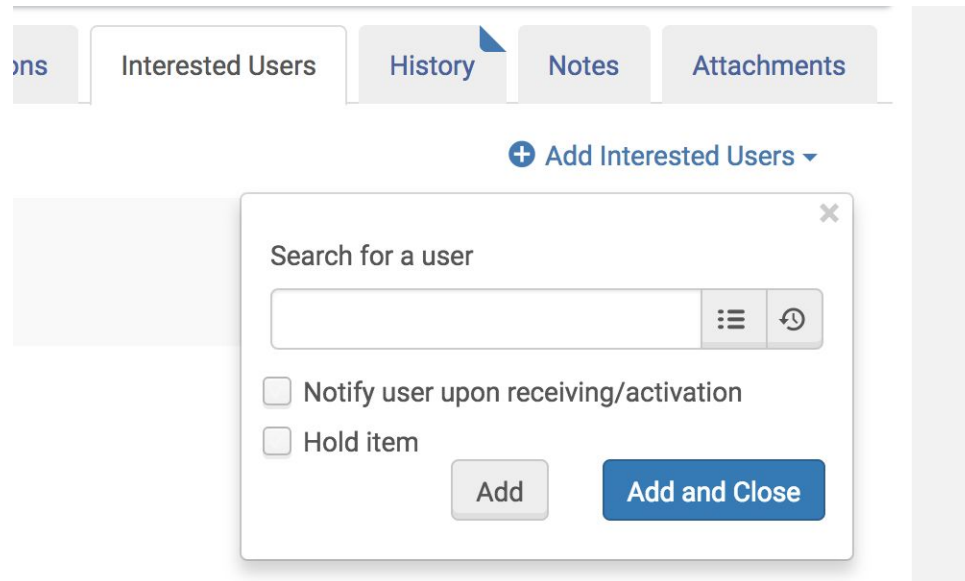
Ordered Items



+ Add Location

| Library | Location | Barcode | Receiving Date | Item Policy |
|---------|----------|---------|----------------|-------------|
|---------|----------|---------|----------------|-------------|

add “Interested Users” so notifications are sent upon receipt of item or when item is placed on hold



The image shows a user interface with a horizontal tab bar containing the following tabs: 'ons', 'Interested Users', 'History', 'Notes', and 'Attachments'. Below the tabs is a button labeled '+ Add Interested Users' with a dropdown arrow. A modal dialog is open, titled 'Search for a user', with a search input field, a list icon, and a refresh icon. Below the search field are two checkboxes: 'Notify user upon receiving/activation' and 'Hold item'. At the bottom of the dialog are two buttons: 'Add' and 'Add and Close'.

“Order Now” send the POL for automatic packing

< Purchase Order Line Details



Delete

Cancel line

Relink

Order Now

Save

Back

Save and Continue

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| | | | | | |
|------------------------|-----------------------|----------------------|---------------|------------------|------------------------|
| Order Line | POL-145 | Order | - | Status | In Review (2019-02-21) |
| Order line type | Print Book - One Time | PO line owner | Milne Library | Sent date | - |

if prompted to add a reporting code, click “Confirm”

Confirmation Message

You are about to send this order: POL-145



At least one of the reporting codes is missing.

Are you sure you want to perform this action?

Cancel


Confirm

The POL has been sent for packaging and local holdings are attached to the bib record.

Order lines ▾ Title ▾ the secret life of cats X 🔍 Advanced ▾

Purchase Order Lines (1 - 1 of 1) | the secret life of cats Back Save Query

Expand ▾ 📄 ⚙️

1  **The secret life of cats / Robert de Laroche, Jean-Michel Labat., Hauppauge, NY :, Barron's, ©1995., 0812065131, ISBN** Edit Change Bib Reference ...

MMS ID: 995340750204833
Assigned to: -
Type: Print Book - One Time
PO line owner: Milne Library
Standard number: 0812065131
Order: PO-602 / (Sent)
Order Line: POL-145 / (Sent)

Copies: Milne Library - Upper Level-MCIRC (1)
Total price: 25.00 USD
Funds: Library (50.0%) (FY-2019), Anthropology (50.0%) (FY-2019)
Vendor/Account: YANKEE BOOK PEDDLER INC / Print Firm Orders GOBI - Print Firm
Vendor reference ID: -
Expected delivery: 02/20/2019

Receiving note: -
Sent date: 02/20/2019
At least one of the reporting codes is missing

Physical One Time (1)

| Library | Location | Call Number | Barcode | Availability | Received Date |
|---------------|-------------------|---------------------|---------|----------------|---------------|
| Milne Library | Upper Level-MCIRC | SF445.5 .L3813 1995 | - | ● Not Received | - |

POL example: electronic collection

All titles ▾ Title ▾ kanopy ✕ 👤 ▾ 🔍 Advanced ▾

All Titles (1 - 10 of 10) kanopy

[🏠 Institution](#) [👤 Network](#) [👤 Community](#)

Sort by: Rank ▾ Secondary Sort by: Rank ▾ Expand ▾ 🔗 ⚙️

1 [🏠 Kanopy](#) Order

Visual material {Undefined} two-dimensional movina image; video; online resource (San Francisco CA : Kanopy, [2008]-)

Subject: Motion pictures--Databases. Documentary films--Databases. Streaming video. and others

Language: Multiple languages

Update Date: -

Contributed by Rutgers University Libraries

● Electronic (1)

1 **Kanopy.**

Visual material {Undefined} two-dimensional moving image; video; online resource (San Francisco CA : Kanopy, [2008]-)

Subject: Motion pictures--Databases. Documentary films--Databases. Streaming video. and others

Description * **Kanopy.**

Purchase type * **Electronic Collection - Subscription**

PO line owner * **Milne Library**

Load from template

Assign inventory manually

Kanopy., Kanopy,



Order Line POL-146 **Order** - **Status** In Review (2019-02-21)
Order line type Electronic Collection - Subscription **PO line owner** Milne Library **Sent date** -

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

Ordered Items



License

Select from a list



View license





| Name | Type | Activation Status | Activation Date | Additional PO Line |
|-----------|----------|-------------------|-----------------|--------------------|
| 1 Kanopy. | Database | Not active | - | |

It is possible to attach a license to the POL
(the license is not the vendor record with type of licensor)

The Activation Status will be "Not Active"

Vendor Information ▼

| | | | | | |
|--|--------------------------------|--|---|---------------------------------|---|
|  Material supplier * | <input type="text"/> | <input type="button" value="☰"/> <input type="button" value="↻"/> View vendor |  Access provider | <input type="text"/> | <input type="button" value="☰"/> <input type="button" value="↻"/> |
| Claiming grace period (days) | <input type="text" value="0"/> | | Expected activation after ordering (days) | <input type="text"/> | |
| Or expected activation date | <input type="text"/> | <input type="button" value="📅"/> | E-Activation due after ordering (days) | <input type="text" value="30"/> | |

Material Supplier is a required field

Access Provider is optional, but helpful to include for electronic collections


Both of these fields are populated by vendor records

Pricing ▼

| | | | | |
|---------------------------|--------------------------------|-----|--------------|----------------------------------|
| List price * | <input type="text"/> | USD | Net price | 0.00 USD |
| Quantity for pricing * | <input type="text" value="1"/> | | Discount (%) | <input type="text" value="0.0"/> |
| Amount paid in current FP | - | | | |

Funding ▼

[+ Add Fund](#) ▼



No records were found.

List price, Quantity for pricing, and Funding all work in the same way as the first example for print book


PO Line Details ▼


| | | | |
|--------------------------|------------------------------------|-------------------------------|--------------------------|
| Acquisition method | Purchase at Vendor System ▼ | Material type | ▼ |
| Invoice status | No invoice ▼ | Reporting code | ▼ |
| Secondary reporting code | ▼ | Tertiary reporting code | ▼ |
| Rush | <input type="checkbox"/> | Manual packaging | <input type="checkbox"/> |
| Cancellation restriction | <input type="checkbox"/> | Cancellation restriction note | <input type="text"/> |
| Vendor reference number | <input type="text"/> | Vendor reference number type | ▼ |
| Note to vendor | <input type="text"/> | Vendor invoice number | - |


These fields behave the same way as the first example for print book

Renewal ▼

Manual renewal

Subscription from date 

Subscription to date 

Renewal date * 

Renewal reminder period (days) *

Manual Renewal versus Automatic Renewal

Renewals are processed as follows:


1. If the PO line is marked as automatic, the **Renewal date** is automatically incremented according to the **Renewal cycle**. The PO line is then saved back in the repository for further processing (step 4).
2. If the PO line is marked as manual, it appears in the renewals task list (see [Processing Renewals](#)) and you are required to manually update the **Renewal date** and/or any other fields in the Renewals section of the PO Line Summary tab. The PO line will be set to **Waiting for Renewal**. You then select **Renew** to continue the renewal processing (step 4). Updating the Renewal date will also remove the PO line from the renewals task list.


ExL Documentation:


[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/040Renewals/010Renewal_Workflow](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/040Renewals/010Renewal_Workflow)

Renewal ▼

Manual renewal

Subscription from date 

Subscription to date 

Renewal date * 

Renewal reminder period (days) *

Add the subscription start and end dates

Enter the Renewal date and Renewal reminder period

The Renewal reminder period is the number of days in advance of the renewal date that the renewal will appear in the task list.

“Interested Users” work in the same way as the first example

Kanopy., Kanopy, i v

| | | | | | |
|------------------------|--------------------------------------|----------------------|---------------|------------------|------------------------|
| Order Line | POL-146 | Order | - | Status | In Review (2019-02-21) |
| Order line type | Electronic Collection - Subscription | PO line owner | Milne Library | Sent date | - |

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

Ordered Items

Interested Users | History | Notes | Attachments

+ Add Interested Users v

Search for a user

Notify user upon receiving/activation

Notify upon renewal

Add Add and Close

Notification letters are sent upon activation or when the resource is renewed

Create a template by selecting “Save as Template”

The screenshot shows a mobile application interface for 'Purchase Order Line Details'. A blue menu icon (three dots) is highlighted with a red box, and a dropdown menu is open, also highlighted with a red box. The dropdown menu contains the following options: 'Cancel line', 'Delete', 'Change Bib Reference', and 'Save as template'. The 'Save as template' option is the one being highlighted in the original image.

Purchase Order Line Details [More Options]

Kanopy., Kanopy,

| | | | |
|------------------------|----------------|----------------------|---------------|
| Order Line | POL-146 | Order | - |
| Order line type | Electronic Col | PO line owner | Milne Library |

Summary | Description | Alerts | Invoice Lines | Associated PO Lines

Enter the desired Template name, or overwrite an existing template by selecting it from the Existing Templates drop-down menu

Save as template

Template Name *

Existing Templates

Public template? * Yes No

Cancel Save

The following fields on the PO Line Summary Tab page are saved as part of a template:

- **Ordered Items section:**

- Number of items to add (Physical items)
- Library/Location (Physical items)
- License (Electronic items)
- Item policy (Physical items)
- Receiving Note (Physical items)

- **Vendor Information section:**

- Material supplier (Physical and Electronic items)
- Or expected receipt date (Physical items)
- Expected activation after ordering (days) (Electronic items)
- Or expected activation date (Electronic items)

- **Pricing section:**

- Quantity for pricing (Physical items)

- **Funding section:**

- Fund (Physical and Electronic items)
- When saving a fund as part of a template, Alma saves the fund code. When loading from a template, Alma always loads the fund from the current fiscal period.

- **PO Line Details section:**
 - Acquisition method (Physical and Electronic items)
 - Reporting code / secondary reporting code / tertiary reporting code (Physical and Electronic items)
 - Note to vendor (Physical and Electronic items)
 - Material type (Physical items)
 - Rush (Physical items)
 - Manual packaging (Physical and Electronic items)
- **Renewal section:**
 - Renewal date (Physical and Electronic items)
 - Renewal reminder period (days) (Physical and Electronic items)
- **Additional section:**
 - Binding/Routing during receiving (Physical items)