

Acquisitions Jobs

Welcome to this training session on acquisitions in Alma. In other training sessions, you learned how to create sets of records, and how to use jobs to apply changes to all members of those sets. In this session, you will learn about acquisitions jobs in Alma. By the way, it would be helpful to watch the other training sessions on acquisitions in Alma before watching this session, so you have a better idea of the terminology used here.

This training session assumes you have some purchase order lines that all need to be modified in the same way. Once you have put those purchase order lines into a set, go to the Run a Job page. Use the Type filter to select jobs that will update purchase order lines. There are several jobs available here; start with Update PO Lines Information, then on the next page, select the set of purchase order lines you already created.

Now you select the Task Parameters for this job. You might need this job if some of the PO lines were created with incorrect settings. For example, maybe you need them all to have a different access provider for e-resources, or there should be a certain license attached to them. Or maybe they ended up with the wrong material type. Note that if a PO line in the set has the status of Closed, this job won't make any changes to that PO line.

If you're concerned that some members of the set already have an entry in the field and you want those to be changed, remember that you can use the Conditions dropdown to change the field unconditionally. Also, be sure to check the first box in the row of any parameters you are changing, otherwise that row's change will not take place.

On the last page of the job wizard, review and confirm the parameters, change the job name if you like, and submit the job. Check the status of the job on the Monitor Jobs page.

In the rest of this training session, you will see the other jobs used to make changes to PO lines. We will only show the Task Parameters page for each job, because everything else is the same as the job you just saw.

The job to Update PO Lines Information - Advanced is also used to update PO lines, in some cases after an order has been created and sent to the vendor. You can change the acquisition method -- although only if the PO lines have not been packaged into a purchase order -- the PO Line Type, and the PO Line Owner. Note that if a PO line being changed by this job is already packaged into a purchase order, the PO line will be removed from that purchase order, and the PO line will be set to In Review. Also, Alma will send a PO Line Cancellation Letter to the vendor. There are some other restrictions and important effects that this job has on PO lines; see the documentation before you run this job.

The Change PO Lines Status job seems pretty simple: All it does is change the status of the PO lines, and the only status choices are Cancel, Close, or Delete the PO lines. However, each of these has some extra parameters that get more complicated. The only PO lines that can be closed are those that are Waiting for Invoice, Waiting for Renewal, or Waiting for Manual Renewal. Also, you have the choice whether to

force a PO line to close even if there are outstanding issues that normally would need to be fixed, and you can choose to remove e-resources from the Activation Task List. When setting PO lines to the status of Cancel, you can again force the cancellation, you can give a cancellation reason, and you are required to tell Alma what to do with any bibliographic records that no longer have holdings and items after the cancellation of that order.

The job to update PO lines transactions allows you to change things like list price and quantity, change the funds or fund allocations, and so on.

Finally, the job to update PO lines workflow is used to change which workflow step the PO lines are in. For example, if you choose Save and Continue, all the PO lines will move from In Review to whatever is the next step in their workflow. The other choices allow you to change PO lines from status Ready to In Review, or to reopen a closed or canceled PO line and set the status to In Review.

And that's how you can change details in a set of PO lines using jobs in Alma!