Purchasing Physical Items

Hi, in this session, you will see how to purchase physical items, including both one-time orders and continuous or subscription orders.

As we discussed in other training sessions on purchasing, the first step in manually purchasing a resource in Alma is to get the bibliographic record. For the example in this training session, you are ordering a second copy of a book, so you already have the bib record in Alma.

No matter how you get the bib record into Alma, after you click Order, you'll see the Purchase Order Line Owner and Type page.

Alma has already added the key bibliographic data about this book. The PO Line Type will determine the rest of the workflow for this material. Based on the bib record, Alma has some recommended types, including the one you need: Print Book - One Time. If you can't find the type of order on the Recommended dropdown list, all the other possibilities will be in the Other list.

Notice that with the purchase order line type selected, you'll see the option to assign inventory manually. Checking this box will prevent the PO line from creating new inventory, and you can attach inventory to the PO line later in the workflow. For this example, leave the box unchecked so that an inventory item is created.

For the PO Line Owner, select the library at your institution that is responsible for the order. This is not necessarily the library that will be the permanent location of the item .

Click Create PO Line . Because the book already exists in your inventory, you'll see a confirmation message letting you know.

This is the Purchase Order Line Details page. You can scroll between its various sections, or click on a section name to jump to it. This training session won't cover every field on this page, but only the most common and important fields.

Our PO line has been assigned a number, and the status of this PO line is "In Review".

The ordered item has been assigned a location and a barcode, based on the owner you selected earlier. If this is not going to be the item's permanent location when you receive it, use the row-action Edit to change the location.

Under PO line Information, the Acquisition method field has several choices, and your choice here has a significant effect on the workflow after this. If you choose Purchase, then the purchase order will be sent by Alma to the vendor, using the information that was configured in the Vendor and Vendor Account. If you select Purchase at Vendor System for the acquisition method, then this purchase order will not automatically be sent from Alma to the vendor. Pick that choice if you already ordered from the vendor using the vendor's system, or if you are going to order that way. A Technical acquisition can be used for several situations where you're not actually buying something. For example, maybe you buy a print book and you also get a free subscription to an e-book version of the book; you could create

a technical PO line for the e-book. The rest of the acquisition methods are not as common, and are explained in documentation. For training situations like this, choose Purchase at Vendor System.

If this item has already been ordered, received, and invoiced, you can select a different Invoice status.

In the Vendor Information section , the only required field is the Material Supplier. The material supplier is the vendor you'll be paying and, for physical items, it is also the vendor that will be sending the item to you. Search for the vendor, which should already be created in Alma, and select the vendor of this item. You can optionally add dates for receipt of this item, and so forth. If these dates pass and you still haven't received the item, then Alma will generate a claim if configured to do so, and the PO line will appear in your task list of outstanding PO lines.

Next is the Pricing and Funding section, and if you will be paying for the item, enter the list price.

For most orders, you will need to select the Fund that will be used to pay for this item. Click here to add a fund, look up the relevant fund, and select it. Save the Funds section. Note that this fund does not have to provide 100 percent of the funding; you can add more funds and split the funding between them.

Your institution may use custom Reporting Codes, which can provide information about this PO line for analytics reports.

When you're ready to place the order, there are a few options. If you select Save and Continue, then the PO Line will move to the next step in the acquisitions workflow, which is to wait for packaging into a purchase order. The PO Lines Packaging job will run overnight and package all PO Lines together that are for the same vendor.

On the other hand , you can select Order Now. That will immediately package this PO line into its own purchase order, and move it to the next step in the acquisitions workflow.

If there are any alerts , they will appear in the confirmation dialog. Click Save to create and send the new purchase order .

The confirmation message includes a link you can use to view this PO line. You can see the new purchase order number, the PO line number, and that the order has been sent.

Some physical resources are received on a continuous basis, such as a subscription to a physical journal. The process for filling out the purchase order line is similar, and starts again with a bibliographic record. After you click Order, you'll choose the PO line type. This time, it's a Print Journal - Subscription. Again, pick the acquisitions team that will own the PO line. If someone at your institution has created an order template for the vendor you are using, then you can load the template and save yourself some work on the next page.

Click Create PO line.

Fill in the PO Line Details page as you did for the one-time order; but note there are a few differences for subscriptions.

For example, in the Vendor Information section is a new field: Subscription Interval, which is how often you'll receive an item.

Under PO Line Information, there is a field to indicate if the vendor has any restriction on cancelling the subscription .

There is also a new section for Renewal Information.

It is useful to enter the Subscription from date and to date, but you're required to enter a Renewal date. This is the date the vendor says you have to notify them of your intention to renew the subscription. You also are required to enter the number of days before that renewal date that you'd like Alma to remind you about the renewal.

By the way, if you'll be ordering from this vendor again for similar items, choose the option to Save as Template, so this will show up on the first page of the PO line workflow .

When done editing the PO line, you will finish the order with Order Now or Save and Continue. Alma will then be ready to help you receive the item from the vendor.

And those are some ways to purchase physical resources in Alma!