

Alma Essentials – Acquisitions

Receive Physical Items

Hi, in this session we'll learn how to receive purchased physical items in the library, for either one-time or continuous orders; how to process an item after receipt; and how to process claims for items that were not received.

Receiving occurs after purchasing; when your library accepts the new materials. During receiving, Alma updates the purchase order line and the item records as needed, and you indicate whether the item requires further processing, or it can be shelved in its intended location.

To receive physical materials in Alma, first make sure you are in a location within your institution that supports receiving. Then, go to Acquisitions > Receiving and Invoicing: Receive.

In the Receiving Workbench we can see all of the purchase order lines with items awaiting receipt. In the One-Time tab you receive items that arrive only once, such as books; and in the Continuous tab you receive items from recurring orders, such as magazines and periodicals.

Let's receive a one-time order.

The first step is to locate the purchase order line of your item. If the inventory awaiting receipt already has an item barcode, we can select Shelf Ready and scan the barcode. Otherwise, we can just search for our title.

The next step is to indicate what happens to the item after receipt. If the item requires further processing before being shelved, check Keep in Department, and select the required processing; for example, to attach a barcode label to the item. If no processing is required, you can keep this box unchecked.

Next, make sure the Received date is correct. Each order has several Options available. Under Manage Items, you can make any required edits to the items before receiving, such as scanning in or entering a barcode in the barcode field. Note that for one-time orders, there is already an existing item-record, so you don't have to create a new item. If the item has interested users, as indicated the column, you can print a list of these users. Upon receipt, Alma will notify the users.

Additionally in the Options menu, you can immediately Receive the item. You can also receive all of the orders that currently appear on the screen by clicking Receive all. Alternatively select specific orders from the list, and click Receive. The selected purchase order line no longer appears in the list, as it has been received. If we search for the title in Alma, we can see the item is in place.

Now let's receive a continuous order. Go to Acquisitions > Receive > Continuous. Here we can see orders for items that are received in regular intervals, such as magazines.

For continuous orders, we need to create the item records before receiving. To ease this process, Alma can be configured to automatically create serial items using Prediction Patterns; more on this in the documentation. In our example, we will add the items manually.

Find your order, and click Options > Manage Items. Here you can see the item records of previous issues already received for this order. Click Receive New Items. If further processing is needed for the received issues, check Keep in Department and select the required process. If needed, edit the Received Date. Here we can see the details of the last item received, such as volume, issue, year, and month. Click Duplicate to copy the Enumeration details into our new item. Modify the new item's details as needed. Click Generate to populate the Description field with the enumeration info. If the Description field is left empty, the item is treated as a monograph. If the Description is full, it is treated as a serial, and displayed to library patrons in the Get It tab, when they view the list of issues. Click Create and Receive.

Our received item has been added to the list for this order. If no further processing is required, it is ready to be shelved.

Received items that were kept in the department and require further processing can be found under Acquisitions > Post-Receiving Processing: Receiving Department Items.

In the Status column we can see the required work-order. For example, these items require a barcode to be attached. After you've completed the requested workflow for an item, click Options > Done. The item is removed from the list. You can also select several items and process them at once.

Finally, orders whose items have not yet been received can be found under Acquisitions > Purchase Order Lines: Claim. Alma creates claims for overdue orders, and can be configured to notify the vendor automatically. You can learn more about configuring and processing claims in the documentation. For each purchase order line, you can see its expected delivery date, as determined by the choices made in the purchase order Line. The expected date can be changed if needed. If you click on a PO line, you can find a summary of the items received, and under Items in Claim, you can see the list of items not yet received. To contact the vendor manually, or to see previous communications, click Communications. You can click on a message to read it, or start a new communication. Once an overdue item is received, the claim is removed.

Thanks for joining!