

Creating Purchase Orders for Subscribed Print Serials after Migration

Welcome to this training session on creating orders for subscribed print serials after migrating from your legacy ILS into Alma. We'll show you how to link up a new purchase order with a migrated serial holding, so that you'll be able to receive new issues of the serial into the holding.

When institutions migrate from a legacy ILS into Alma, some choose to bring their acquisition data and old orders into Alma. However, if your institution did not migrate acquisition data, you may have existing print serials inventory but no purchase order to account for new issues of that serial. In that case, you need to create a new Purchase Order, and then associate that PO with your current print holdings. Here's how to do that.

From Alma, use the persistent search bar to do an All Titles search for the Title of the serial. On the results page, you'll see there is an electronic version, and here is the print version. But there is no order associated with this title. Click the row action menu and choose Order.

For Purchase Order Line Type, choose Print Journal - Subscription. Enter the library or organization at your institution that will own this PO Line. Most importantly, check the box to Assign Inventory Manually. Then in the upper-right corner, click Create PO Line. Alma pops up a note reminding you that this PO Line will not create an inventory item, which is fine, the inventory item already exists, so click Confirm.

The first section, Ordered Items, you will leave blank. Move down the page and fill out the rest of the fields for this serial print order, including the vendor that supplies the material, pricing, funding, renewal date, and any other optional fields that your institution uses. For Acquisition method, select Purchase at Vendor System, because the subscription is already in place with the vendor. At the top of the page, click Save. In the next step, you'll need the PO Line number Alma assigned here, so copy it down somewhere temporarily.

Now we need to associate the current holdings with this new PO Line. Again, use the persistent search bar at the top to find the title. On the title with the physical holding, click Holdings. On the Holding you want, click the row-action menu and select Associate a PO Line. Here is where you enter that PO Line number you wrote down. By the way, if you forget the number, you can click here to search for it by the serial title. Then click Update.

Let's finish by going back to that PO Line to package it into a Purchase Order. From the Alma Acquisitions Menu, select Review. Find the PO Line and click Edit. You'll notice that existing holding and items are now linked here. This time, click Save and Continue. This PO Line will be packaged into a Purchase Order during the next nightly job. And when new issues of the serial arrive at your institution, they will be associated with this PO Line and this holding.

And that's how you create new orders for subscribed print serials after migrating to Alma.