Alma Administration – Acquisitions
Configure Purchasing and Invoice Rules

You can automate some of the steps of your acquisitions workflows using purchasing and invoice rules. In this session, we will learn how to configure purchasing review rules, invoice review rules, and invoice approval rules.

Let's begin with automating your purchasing review. The purchasing workflow in Alma consists of these steps: create PO line, validation, review, packaging, approval, and receiving. Several of these steps can be automated, as outlined in the Purchasing Workflow document. In this session, we will learn how to automate the review step, using purchasing review rules. Purchasing review rules define whether automatically created PO lines require manual review, or they are sent straight to the next step.

To configure purchasing review rules, go to Alma Configuration > Acquisitions > Purchase Orders: Purchasing Review Rules. Here we can see the existing purchasing review rules. If these rules evaluate to True – the PO line is sent to manual review, if they are False – it is sent straight to the next step. Alma evaluates these rules as follows: First it evaluates the Default Review Rule. This rule has no criteria to configure, it can only be True or False (per your configuration). If the Default rule is True – all PO lines are sent for review, if it's False – Alma evaluates the Institution Rules in order. If a rule applies to the PO line and its result is True – the PO line is sent to manual review. If it's False – the PO line goes straight to the next step. If no rule applies to the PO line, it is also sent directly to the next step.

You can add purchasing review rules. Let's for example create a rule that sends a PO line to manual review if the ordered book already exists in our inventory. Click Add Rule. Give the rule a Name and optional Description. For the Input Parameters, select the AssertionCode in; these are the criteria we are going to test; for example, there are duplicate active orders, or the fund is over-encumbered. A full list of the possible codes is found in the Configuring Purchasing Review Rules document. In our example, we'll choose Already has inventory, meaning the PO line item already exists in our inventory. You may add several assertion codes. Next, select the Acquisition Methods for which this rule will apply, in our case Purchase. You can optionally limit this rule to a specific Vendor. Select the PO Line Types to which this rule will apply, in our case Print Book - One Time. Select one or more Source Types for the PO lines to which this rule will apply. The Source Type denotes how the PO line was generated, for example via Purchase Request. Select Any to include all Source Types. Finally, for Output Parameters, select False if you want the order line to go straight to the next step, or True if you want it to go to manual review. When done configuring the rule, click Save.

Our new purchase review rule was added. We can change the evaluation order of the rules using the up and down arrows. We can enable and disable rules (where disabled rules are ignored during evaluation), and we can Edit, Duplicate, and Delete rules. With our new rule in place, PO lines whose item is already in inventory will be sent to manual review.

Next, let's talk about invoice rules. Invoicing in Alma consists of the following steps: creation, review, approval, and payment. Of these, you can automate the review step using invoice review rules, and the approval step using invoice approval rules.

To configure invoice review rules, in Alma Configuration, go to Acquisitions > Invoices: Invoice Review Rules. Invoice review rules determine whether invoices are sent for manual review, or they are sent directly to approval. They are configured in much the same way as purchasing review rules. Here too, there is a Default Review Rule, which you can configure be either always True or always False. By default, this rule is False, meaning all invoices are sent straight to approval (unless we add a rule that specifies otherwise). If the Default Review rule is True – all invoices will be sent to manual review.

To add your own invoice review rules, click Add Rule. Let's add a rule that sends invoices to manual review if the vendor on the invoice is different than the vendor on the PO line. Give the rule a Name and optional Description. Select the Assertion Code, in our example: Invoice using different vendor than poline. You can learn about all the available Assertion Codes in the Configuring Invoice Review Rules document. You can optionally limit this rule to a specific Vendor. You can limit this rule to specified Invoice Line Numbers using a regular expression. Enter an asterisk (\*) to match all invoice line numbers. You can select one or more Invoice Creation Form Options; for example, to limit this rule only to invoices created manually. For Output Parameters, True means the invoice is sent to manual review, and False means it is sent straight to approval. When done configuring your rule, click Save.

The rule is created, and now manually created invoices that have a different linked vendor than the PO line will be sent to manual review. All other invoices will go straight to approval.

Finally, you can automate invoice approval using invoice approval rules.

To configure invoice approval rules, in Alma Configuration, go to Acquisitions > Invoices: Invoice Approval Rules. If these rules are evaluated as True – the invoice is sent to manual approval. If evaluated as False, it is sent straight to payment.

Configuration is similar to invoice review rules. If you are adding a new invoice approval rule, you can learn about all the available Assertion Codes in the Configuring Invoice Approval Rules document.

 So that's how you configure purchasing and invoice rules to significantly automate your acquisitions workflows.

Thanks for joining!