**Acquisitions**

**Training Materials**

[**Acquisitions**  **Infrastructure**](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/I_Acquisitions_Infrastructure)

[**Purchasing**](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/J_Purchasing)

[**Receiving and Invoicing**](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/L_Receiving_and_Invoicing)

**Consortia Considerations**

* + [Sharing Vendor Information in a Network Zone](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/100Managing_Multiple_Institutions_Using_a_Network_Zone/06_Acquisitions_in_Consortia/030Sharing_Vendor_Information_in_a_Network_Zone)
  + [The Alma Collaborative Network](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/010Getting_Started/030Alma_Topologies#The_Alma_Collaborative_Network)

**Hands-on Exercises**

**Instructions**Using your sandbox, **sign in as** **AlmaUser01.**Ensure that you are in the **Main Library-Main Technical Services Library** location. You can do this by clicking on the location icon in the upper right hand corner and selecting this location (if it is not already selected). For these exercises, you may choose to either use the initial prompt to complete the activity on your own, or if you prefer, follow the step-by-step instructions. 

**Exercise 1: Create a PO line for a print book - one-time purchase**

* Go to **Resources > Cataloging > Search Resources**
* In Search Cataloging Profile: **Library of Congress**, search for a book of your choice and click **Import**
* Click the Shopping Cart icon (Create POLine & Exit) or enter **Ctrl+Alt+O**
* On the **PO Line Owner and Type** screen:

**PO line type:** Print Book – One time

**PO line owner:** Main Library. This determines which receiving department will receive the item

**Load from template**: leave blank

**Assign inventory manually:** leave blank

* Click **Create PO line**
* On the **Purchase Order Line Details** screen:

Fill in required fields: **Material supplier, List price, Quantity for pricing,** and **Add Fund**

Under **Acquisition method**: choose **Purchase at Vendor System**.

Fill in **Reporting codes** if desired

Click**Order Now**to immediately create the PO. Note the PO Line number.

* Search for the PO line in the persistent search box. The PO and PO line status should be set to Sent
* Review the PO if applicable - A PO is sent for review if mandatory information is invalid or missing. **Edit** the PO line, fill in missing information, and click **Order Now**

**Exercise 2: Receive an Order: receive the order created above**

* Go to**Acquisitions > Receiving and Invoicing > Receiving**
* On the **Receive New Material screen**:
  + Check **Keep in Department** and select **Copy Cataloging** so that the item remains in technical services while processing is completed
  + Confirm that you are on the **One Time** tab
* Click the checkbox next to the item and click **Receive**
* Go to **Acquisitions > Post-Receiving Processing > Receiving Department Items**.
* Perform the work that needs to be done, changing the **Processing Status** as the material moves through the department

Click the row action menu (ellipsis) and choose **Edit Inventory item** and at a minimum enter a barcode. Note the barcode.

**Save** item changes

* Click **Acquisitions > Post-Receiving Processing >Scan In items**
* Click the radio button marked Done and scan in the item barcode

If the acquisitions department is managed by the circulation desk, the item will have a status of Item In Place

If the acquisitions department is NOT managed by the circulation desk, the item is in transit.

* Change your location to Main Library Circulation
* Go to **Fulfillment > Resource Requests > Scan In Items** and scan or enter the barcode.

The transit status is removed and the item is in place.

**Exercise 3: Create an invoice manually: create an invoice for the order above**

* Go to **Acquisitions > Receiving and Invoicing > Create Invoice**
* On the **Select Invoice Creation Process** screen
  + Select **Manually,** leave **Handle Receiving** box unchecked**,** and click **Next**
* On the **Invoice Details** screen:
  + Enter required information: **Invoice number, Invoice date, Vendor, Total amount, Invoice date, Owner**
  + **Payment method**: choose Credit card
  + Click**Save** and **Create Invoice Lines**
* On the**Invoice Lines** tab, click**Add invoice line**
* The **Add Invoice Line** pop up screen appears
  + **PO line**: enter the PO line number or click **Select From List** icon to search for the PO line created above and choose it when it appears

The invoice line will be populated with price, quantity, and fund information from the PO line.

* + Click **Add and Close**

The lines for Shipment, Discount, Overhead, and Insurance were generated automatically. Alma can be configured to not create any or some of these lines.

* + Click Save **and Continue**
* Search for the invoice in the persistent search box. If the invoice's status is **Waiting for payment**
* To close the invoice, right click on the invoice, click **Go to task list**
* Right click on the invoice and click**Edit**
* In the**Invoice Details**screenadd Payment identifier and click**Save and Continue**

The status of the invoice should be set to**Closed**. It is possible to configure your production environment so that invoices are closed immediately after they are created.

**Notes on statuses:**

* Invoice sent to **Review** status if: (1) Review rules are configured or (2) Save is used instead of Save and Continue or (3) Data issues or alerts are discovered during processing
* Invoice sent to **In Approval** status if Approval rules are configured
* Invoice is set to **Ready to be Paid** if the invoice is ready to be sent to the ERP System
* Invoice is set to **Waiting for Payment** if the invoice was successfully sent to the ERP OR if the invoice needs to be manually paid by an operator in Alma (invoice\_skip\_erp = true & handle\_invoice\_payment = true)
* Invoice is set to “Closed” if:

(1) the ERP has marked an invoice as Paid

(2) An operator has manually marked the invoice as Paid

(3) Prepaid/Internal Copy option was checked

(4) The institution does not require approved invoices to be exported to the ERP or be manually approved (handle\_invoice\_payment = false)