

Implementing Acquisitions in Alma Series

Introduction

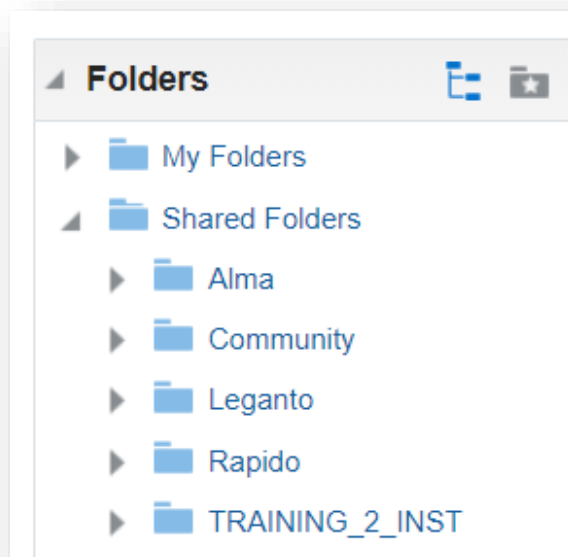
April 12-13, 2023

1. Could you advise how to find out what POLs have remaining encumbrance against a fund?

Coming to the end of the year we need to know what payments are outstanding for both one time and continuous orders as these orders need chasing with vendors before the end of financial year (we do not carry any funds over to the next fiscal year). We also want to ensure we have spent our allocation amount for the year - we have found orders in the past where for one reason or another the encumbrance has not yet been released - there should be a report available from funds to show what the encumbered value is made up of (i.e. what POL's are still showing encumbrance or a link to an out of the box analytics report).

ExL—You can get a list of encumbrances on funds in Analytics. Based on what you wrote, additional factors (po line creation date, expected receipt date, etc.) need to be taken into consideration. Plus, the output of your report will need to include details like the title and vendor associated with each encumbrance.

The **Fund Balances** or **Funds Overview** reports in *Shared Folders > Alma > Acquisitions > Reports* might be a good place to start. You can copy those reports and edit them to suit your needs. Another option is to search the **Community** folder for reports that other customers have written.



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2. **Speaking of don't make it more difficult---IF a person is using Acquisitions for tracking and not actually linked to any business office, are there steps that you would skip in set-up or configuration?**

ExL—The configuration still requires vendor records and ledgers. The difference will be during invoicing. We'll be covering invoicing in a later session.

3. **Can you elaborate on the purpose and difference between "Process Type" and "IN Process type" elements which were mentioned earlier in the session?**

ExL— The different process types can each be used as search criteria:

- The index "In Process Type" in the advanced search enables you to search by the locally defined Work Orders.
- The value "In Process" groups the items with a work order type into one type for purpose of searching.

This [Knowledge Article](#) goes into more detail on this answer.