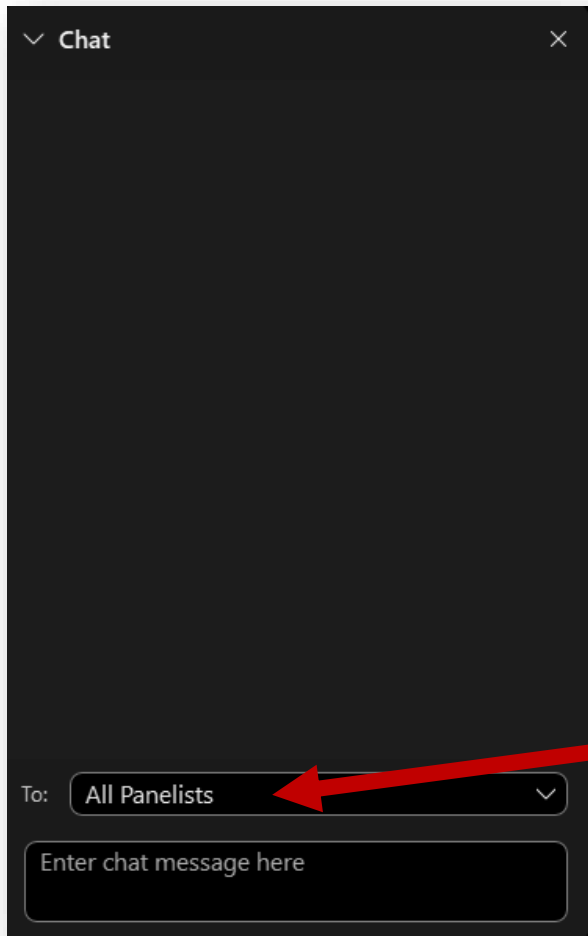


An illustration depicting a library workflow. On the left, a large hexagonal badge with a blue and yellow border contains the text 'Implementing Acquisitions in Alma'. To the right of the badge, a series of four circular icons are arranged in a horizontal line: a document with a checkmark, a document with a magnifying glass, a document with a cursor, and a document with a magnifying glass. Further right, a person is seated at a desk, working on a computer. To the right of the desk is a tall bookshelf filled with books. The background features large, light blue and green circular shapes.

Implementing Acquisitions in Alma

Session 2: Ordering Electronic and Physical Resources

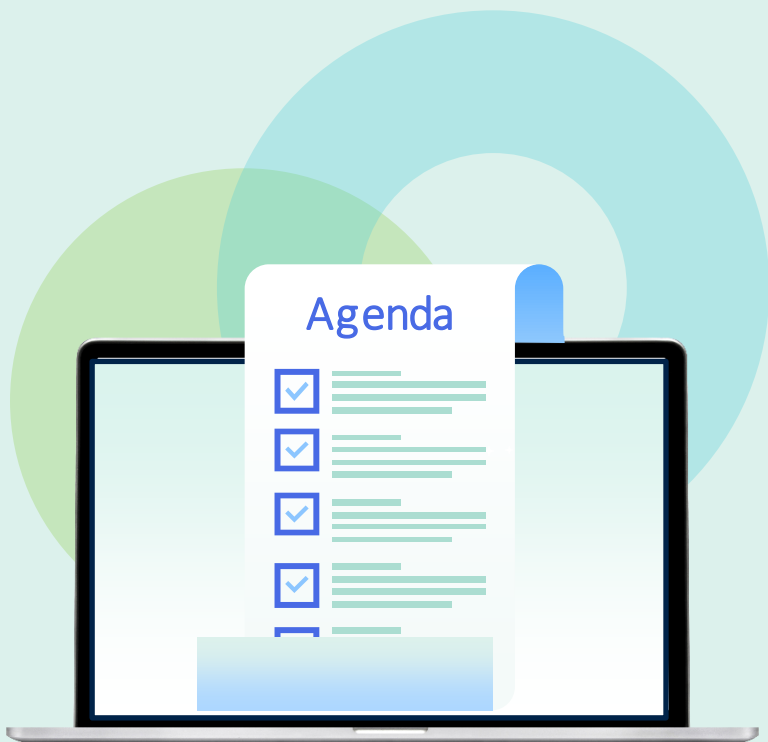


A few points about WebEx

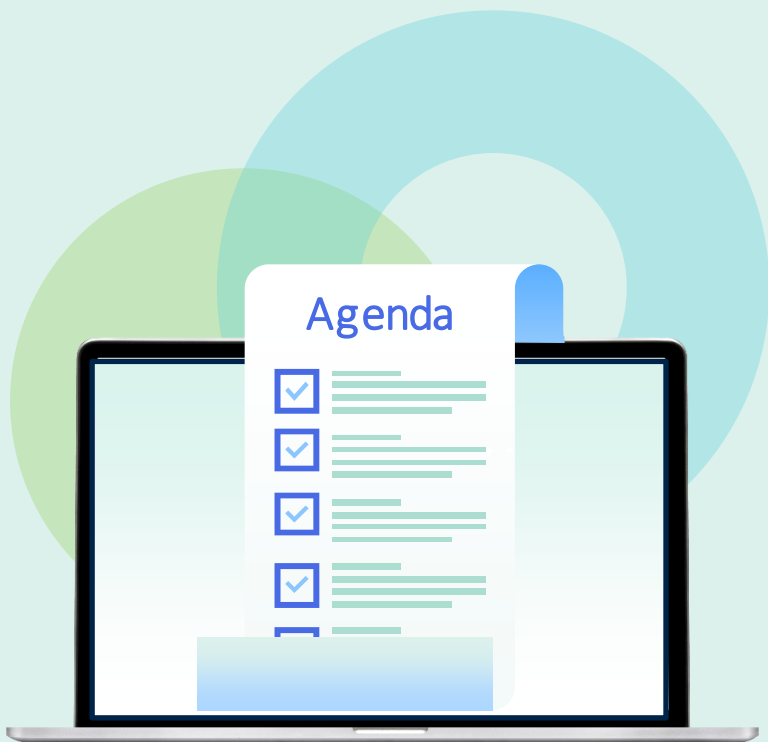
- If you encounter any audio or video issues, exit and rejoin the WebEx session.
- The meeting is being recorded and will be made available to you on the series dashboard.
- Select **All Panelists** in the **To:** dropdown menu to submit questions via WebEx Chat.

Implementing Acquisitions in Alma

	Session Name	Dates
1	Implementing Acquisitions in Alma	April 13
2	Ordering Electronic and Physical Resources	April 20
3	Activating Electronic Resources and Claiming	April 27
4	Receiving Physical Resources and Post-Receiving Processing	May 4
5	Invoicing Resources	May 18
6	Automating the Acquisitions Process	May 25

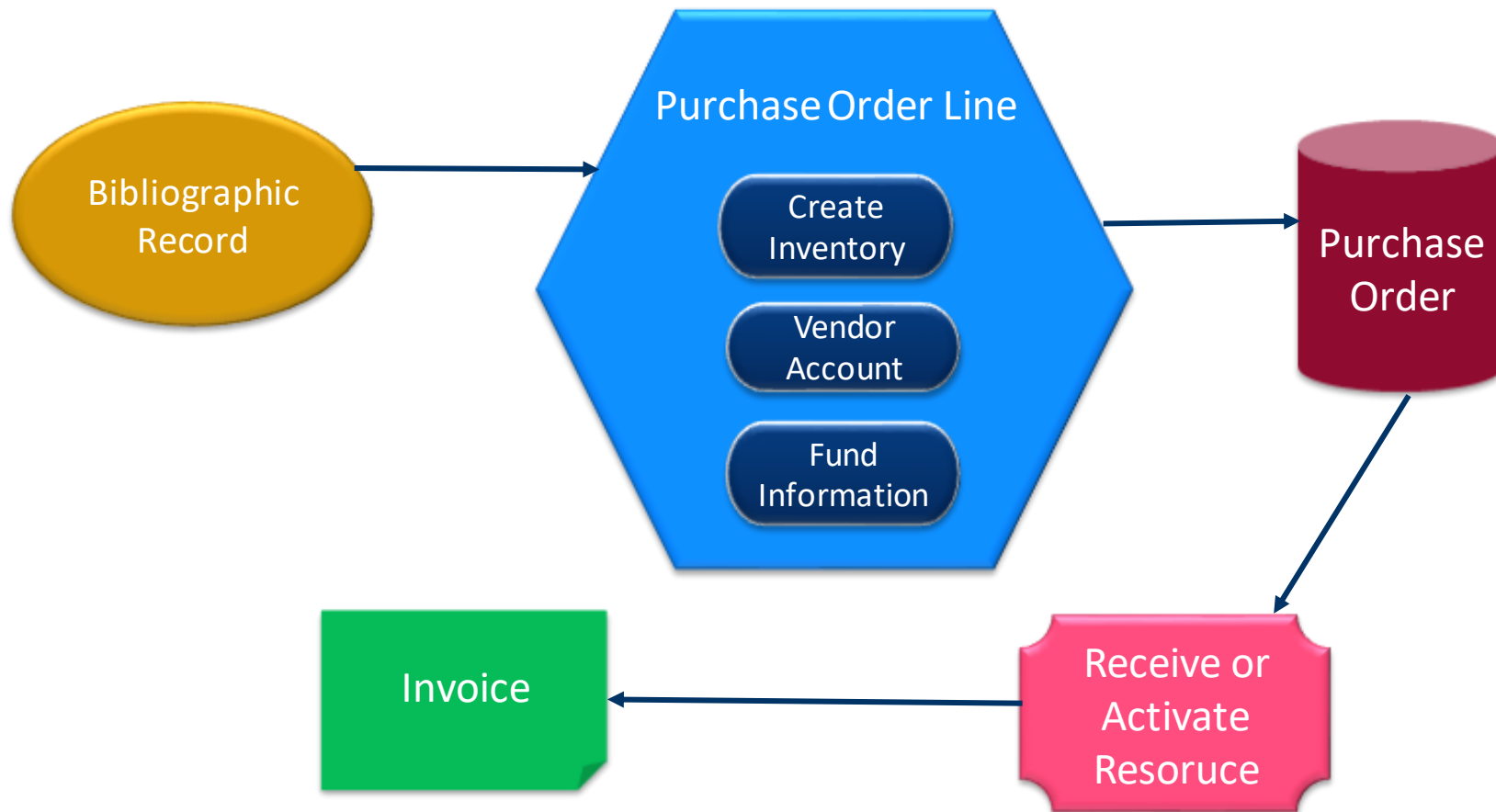


- Ordering Basics and Roles
- Sources for Bibliographic Records
- Purchase Order Lines
- One-Time Orders
- PO Line Templates
- Continuous Orders
- Standing Orders
- PO Line Statuses



- **Ordering Basics and Roles**
- Sources for Bibliographic Records
- Purchase Order Lines
- One-Time Orders
- PO Line Templates
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- Standing Orders
- PO Line Statuses

General Acquisitions Workflow



Ordering Basics

- PO Lines in Alma begin with a Bibliographic Record
- PO Lines are created and then packaged into Purchase Orders
- Purchase Orders are virtual containers that group PO lines together.

Alma's focus is on the PO Lines

- Ordering
- Receiving/Activating
- Invoicing

Operator Roles Related to Ordering

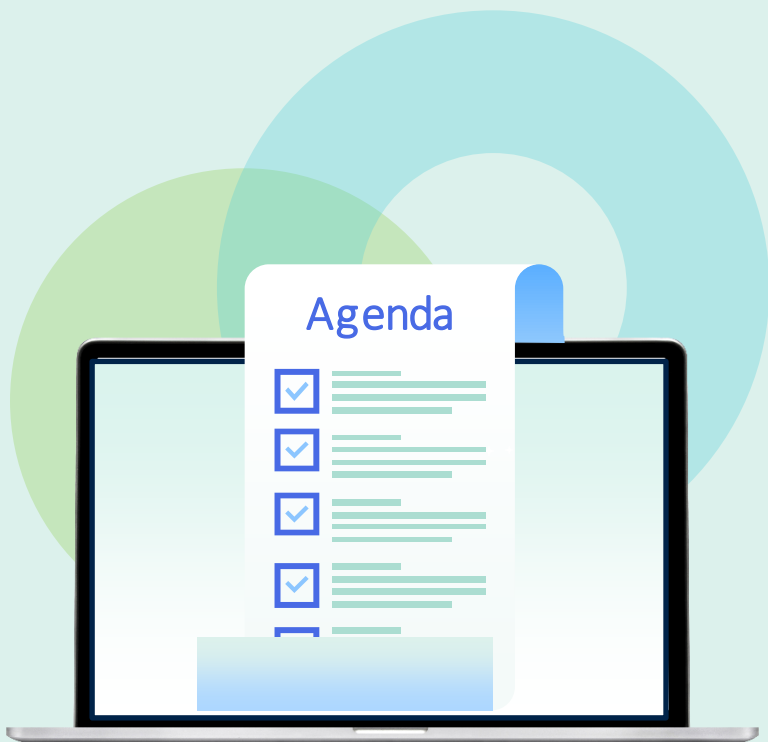
- Purchasing Manager
- Purchasing Operator
- Purchasing Operator Extended
 - Adds the ability to cancel or delete PO Lines

Operator Roles Related to Ordering

- See document titled **Acquisitions User Roles and Terminology**

- See table titled User Roles in the Knowledge Center:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/030User_Management/060Managing_User_Roles#User_Roles_.E2.80.93_Descriptions_and_Accessible_Components](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/030User_Management/060Managing_User_Roles#User_Roles_.E2.80.93_Descriptions_and_Accessible_Components)



- Ordering Basics and Roles
- **Sources for Bibliographic Records**
- Purchase Order Lines
- One-Time Orders
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Sources for Bibliographic Records

- PO Lines require a bibliographic record
- Records can be
 - Found in the IZ for reorders/replacements
 - Linked from a NZ record (if you have one)
 - Linked from a CZ record, for electronic resources
 - Imported, one by one, from external resources
 - Created manually in the MD editor
 - Imported via bulk import*

*Will be covered in session 6



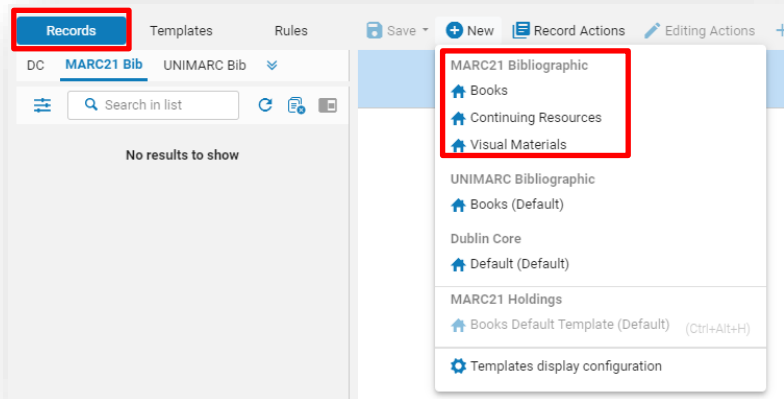
External Resources

- *Resources > Cataloging > Search Resources*
- *Search & Browse > Search Resources* from the Records tab in the MD Editor



Manual Record Creation from a template in the MD Editor

- On the Records tab in the MD editor select New > MARC21 Bibliographic > Select template

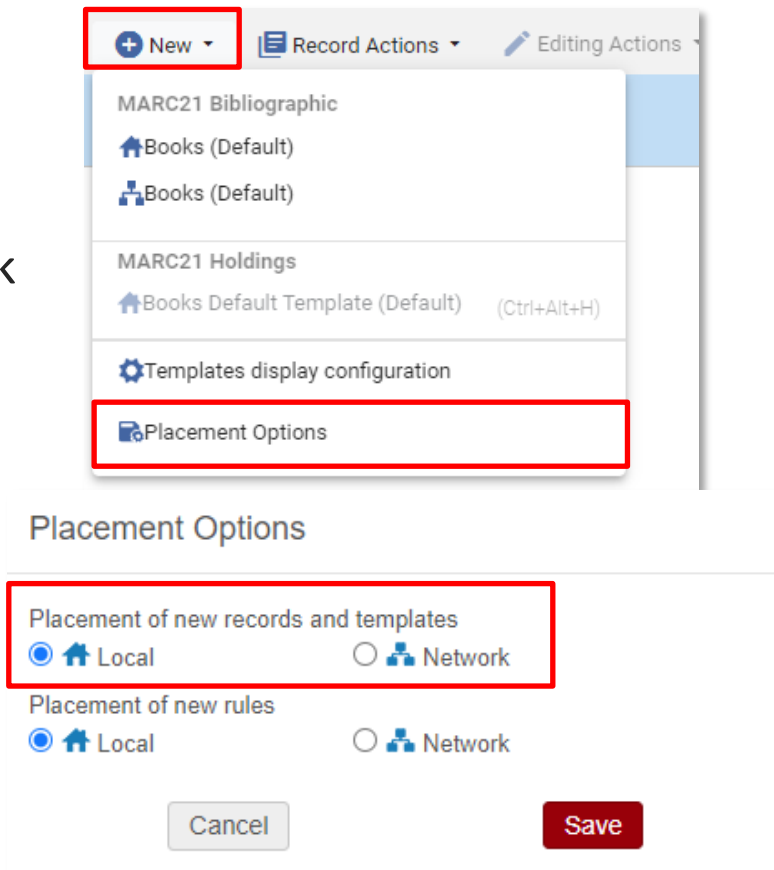


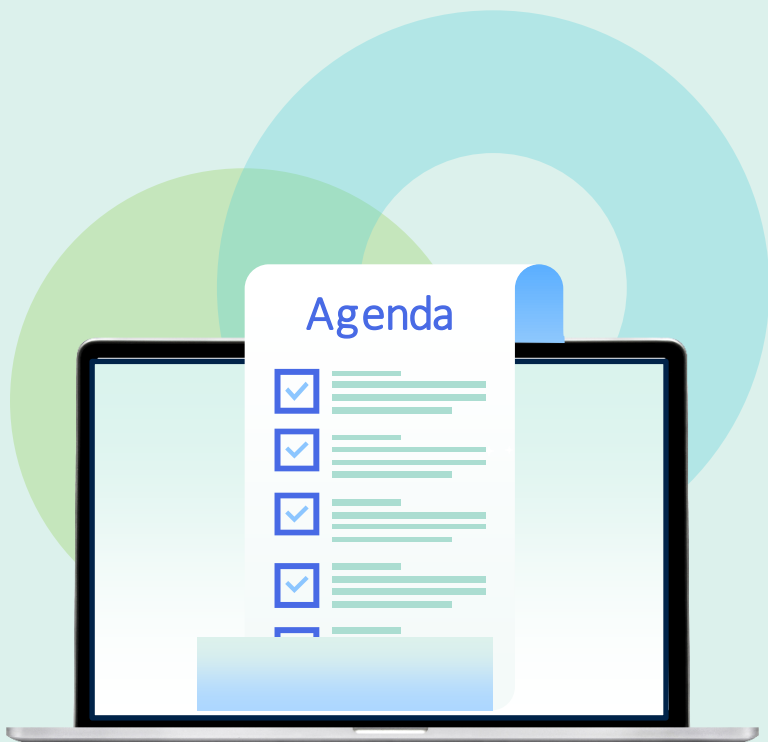
The screenshot shows the MARC21 record view for record (99250141500541). The record is displayed in a table format with fields and their values.

Field	Value
LDR	#####nam#a22#####u#4500
008	#####s2013####xc#####000#0#eng#d
020	\$\$a
035	\$\$a (OCoLC)
040	\$\$a
041	0 \$\$a
050	0 0 \$\$a
100	1 \$\$a \$\$b \$\$c \$\$d
240	1 0 \$\$a
245	1 0 \$\$a \$\$b \$\$c \$\$h
246	1 1 \$\$a \$\$b
250	\$\$a \$\$b
260	\$\$a \$\$b \$\$c
300	\$\$a
490	0 \$\$a \$\$v
500	\$\$a
502	\$\$a
505	0 \$\$a
650	0 \$\$a
650	0 \$\$a
651	0 \$\$a \$\$x
700	1 \$\$a \$\$b \$\$c \$\$d
710	1 \$\$a \$\$b
710	2 \$\$a \$\$b
711	2 \$\$a \$\$n \$\$c \$\$d

Network Zone

- Create orders from existing Network Zone records
 - Attach local inventory to the Network Zone so other institutions can see availability
- Consult Network to determine workflow for new records
- In MD Editor, **New > Placement Options**





- Ordering Basics and Roles
- Sources for Bibliographic Records
- **Purchase Order Lines**
- One-Time Orders
- PO Line Templates
- Continuous Orders
- Standing Orders
- PO Line Statuses

Purchase Order Lines

PO lines (POLs):

- Create inventory
- Encumber funds
- Are bundled into Purchase Orders
- Trigger workflows
 - Activation or receiving
 - Invoicing
 - Claims
- Can launch other workflows such as trials and renewals



PO Line Type

Defines:

- Inventory format
 - Physical
 - Electronic
- Continuity
 - One-time
 - Continuous
 - Standing

< PO Line Owner and Type Cancel Create PO line

1 **The joy of geometry / by Alfred S. Posamentier.**
Book (Book - Electronic) text; computer; online resource By Posamentier, Alfred S., (Amherst, New York : Prometheus Books, 2020.)
ISBN: 9781633885875 (ebook) and others
Subject: Geometry--Study and teaching.

Description * **The joy of geometry / by Alfred S. Posamentier.**

PO line type * **Recommended: Electronic Book - One Time** ▼

PO line owner * **Science Library** ▼

Load from template ▼

Assign inventory manually ☐

Acquisition/item material type

Choice affects downstream workflows

Choosing a PO Line Type

	One-Time Orders	Continuous Orders	Standing Orders
Order line	Closed when activated or received AND invoiced	Open until cancelled	Open until cancelled
Receipt/ Activation	<i>Electronic:</i> standard activation <i>Physical:</i> receiving workbench on the one-time tab	<i>Electronic:</i> standard activation <i>Physical:</i> receiving workbench on the continuous tab	<i>Electronic:</i> NA <i>Physical:</i> not received via receiving workbench
Inventory	<i>Electronic:</i> portfolio created <i>Physical:</i> one holding created per location, one item record created per copy	<i>Electronic:</i> collections and portfolios created <i>Physical:</i> One holding created, items are created later	<i>Electronic:</i> NA <i>Physical:</i> inventory is created manually
Use Case	<i>Electronic:</i> single payment resources <i>Physical :</i> single payment resources	<i>Electronic:</i> e-resource subscriptions <i>Physical:</i> use for serial subscriptions	<i>Electronic:</i> NA <i>Physical:</i> monographic series

PO Line Types

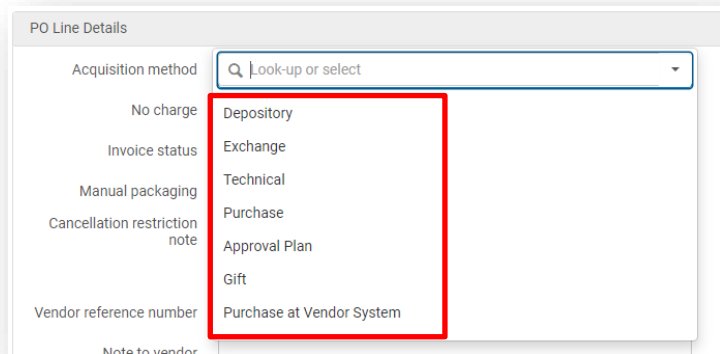
Explanation of Purchase Types Workflow and Inventory

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma Online Help \(English\)/020Acquisitions/020Purchasing/010Purchasing Workflow#Explanation of Purchase Types Workflow and Inventory](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/010Purchasing_Workflow#Explanation_of_Purchase_Types_Workflow_and_Inventory)

Enabling/Disabling PO Line Types

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma Online Help \(English\)/020Acquisitions/110Configuring Acquisitions/070Enabling Disabling PO Line Types](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma Online Help (English)/020Acquisitions/110Configuring_Acquisitions/070Enabling_Disabling_PO_Line_Types)

Acquisition Method



The screenshot shows a 'PO Line Details' form. The 'Acquisition method' field is highlighted with a red box. The dropdown menu is open, showing the following options: Depository, Exchange, Technical, Purchase, Approval Plan, Gift, and Purchase at Vendor System. The 'Look-up or select' text is visible in the search bar of the dropdown.

Field	Value
Acquisition method	Look-up or select
No charge	Depository
Invoice status	Exchange
Manual packaging	Technical
Cancellation restriction note	Purchase
Vendor reference number	Approval Plan
Note to vendor	Gift
	Purchase at Vendor System

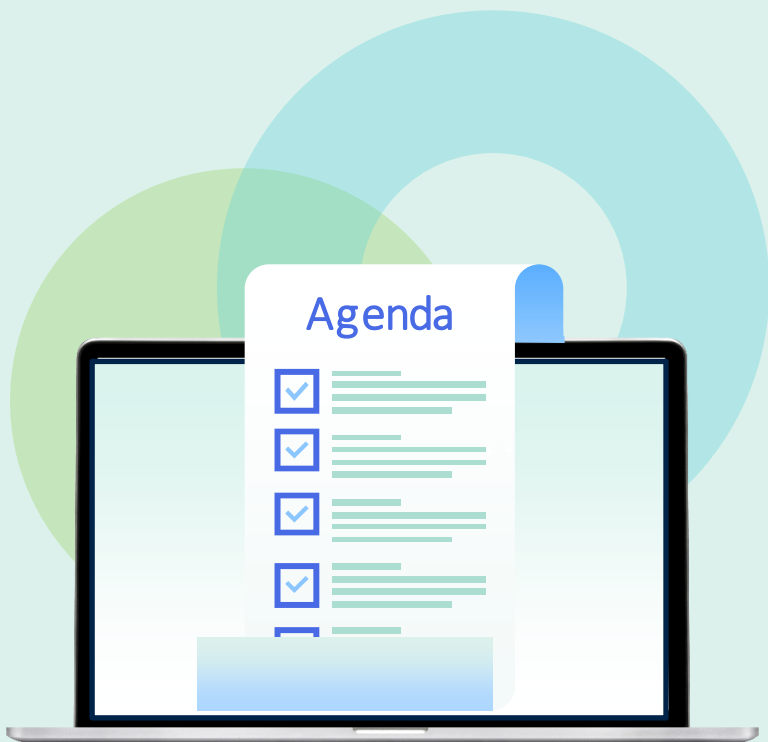
- Acquisition method is set at the PO Line level
- Configuration settings
 - Choose a default value when creating lines manually
 - Enable/disable options
- Can be set in a PO Line template

Review the table titled *Acquisition Methods* from the documentation

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/020Purchasing/020Creating_PO_Lines/030Manually_Creating_a_PO_Line#Acquisition_Methods](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/020Creating_PO_Lines/030Manually_Creating_a_PO_Line#Acquisition_Methods)

Acquisition Methods

Acquisition Method	List Price Optional	Send via EDI/Email
Approval		
Depository—Gov Docs	✓	
Exchange	✓	
Gift	✓	
Purchase		✓
Purchase at Vendor System		
Technical	✓	



- Ordering Basics and Roles
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- **One-Time Orders**
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One-Time Orders

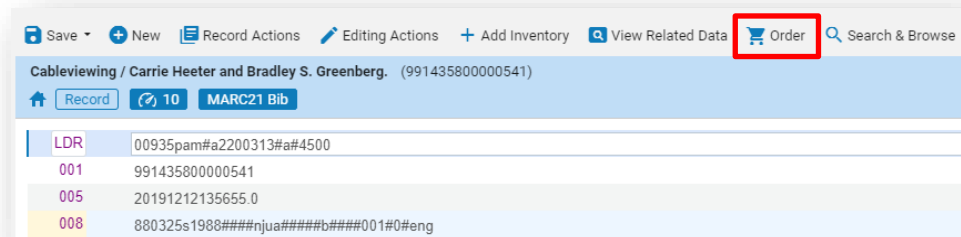
1. Locate or create a bib
2. Create a PO line to initiate the ordering process
3. Fill out and complete the PO line

Same workflow for print or electronic resources

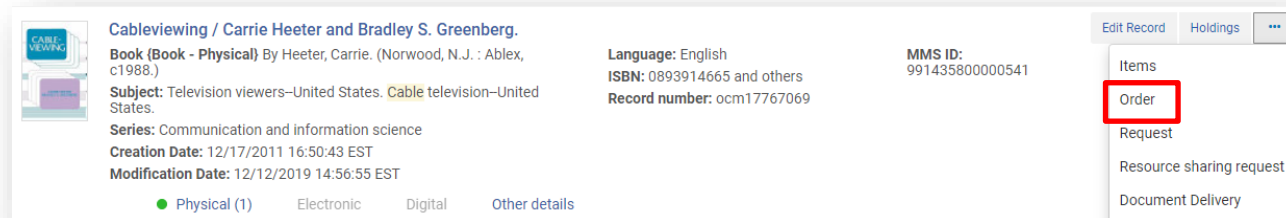
The choices you make at the time of ordering affect what happens downstream

One-Time Orders

- If the bibliographic record is open in the MD Editor, click the shopping cart in the record header



- If the bibliographic record is in the IZ or NZ use the Order button from the row action menu



One-Time Orders

- When purchasing a resource from a CZ record, navigate to the **portfolio** and click **Order** from there

The screenshot displays the ExLibris interface for a CZ record. The top section shows the record details for "Fibre production in South American camelids and other fibre animals [electronic resource] / edited by Maria Ángeles Pérez-Cabal, Juan Pablo Gutiérrez, Isabel Cervantes, Maria Jesús Alcalde." The record is identified as a "Book (Book - Electronic) text: computer; online resource" with an ISBN of 90-8686-727-8 and others. The record number is (CKB)2550000000064051. The record is in English and has an MMS ID of 992550000000064051. The record is available in 20 electronic portfolios.

The "Portfolio List" is shown below the record details. It lists 5 of 20 portfolios, with 0 of 20 portfolios available. The portfolios are:

Collection Name	Service Type
OCUL eBook Collection Springer	Full Text
SpringerNature Complete eBooks	Full Text
Springer Biomedical and Life Sciences eBooks 2012 English/International	Full Text
Wageningen Academic Publishers eBooks	Full Text
SpringerLINK Global Ind Chem Mfg Contemp AirProd Books	Full Text

And others: [Portfolio List](#)

The "Portfolio List" is also shown in a separate window. It lists the portfolios and their associated information:

Portfolio ID	Service ID	Collection ID
5354900000001508021	6254900000000000331	6154900000000000337
5331700000000141404	6231700000000000195	6131700000000000184
5352800000000423163	6252800000000000431	6152800000000000452

The "Order" button is highlighted in the "Portfolio List" window.

The portfolio includes linking and coverage information from the vendor that will be added to the inventory created during the ordering process

One-Time Orders

Required Fields (for firm orders)

- Material supplier (Vendor Account)
- List price
- Quantity for Pricing
- Funding
- Acquisition Method (verify for accuracy)

Optional Fields

- Material type
- Reporting codes
- Expected receipt timing/date
- Interested Users tab—Was this resource a purchase request?

One Time Orders

- Vendor Information section of the PO Line

Print

Vendor Information	
Material supplier *	ProQuest Company/PROQUEST/ProQu X View vendor
Expected receipt after ordering (days)	0
Reclaim Interval (days)	0
Claiming grace period (days)	0
Or expected receipt date	06/14/2021

OR

Enter only one Receipt or Activation date

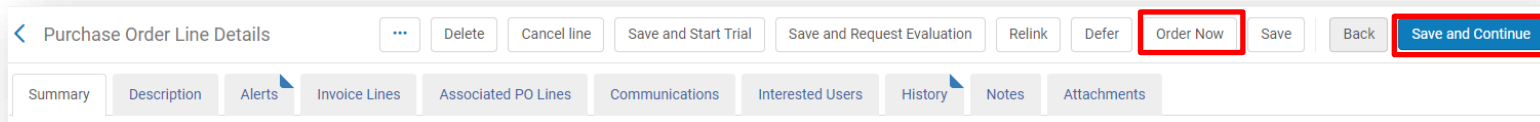
Electronic

Vendor Information	
Material supplier	ProQuest Company/PROQUEST/ProQuest Company/PRO
Claiming grace period (days)	0
Or expected activation date	06/25/2021
Reclaim Interval (days)	0
Access provider	
Expected activation after ordering (days)	0
E-Activation due after ordering (days)	30

OR

Complete the PO Line

The choice made here determines how PO lines are packaged into POs (Purchase Orders)



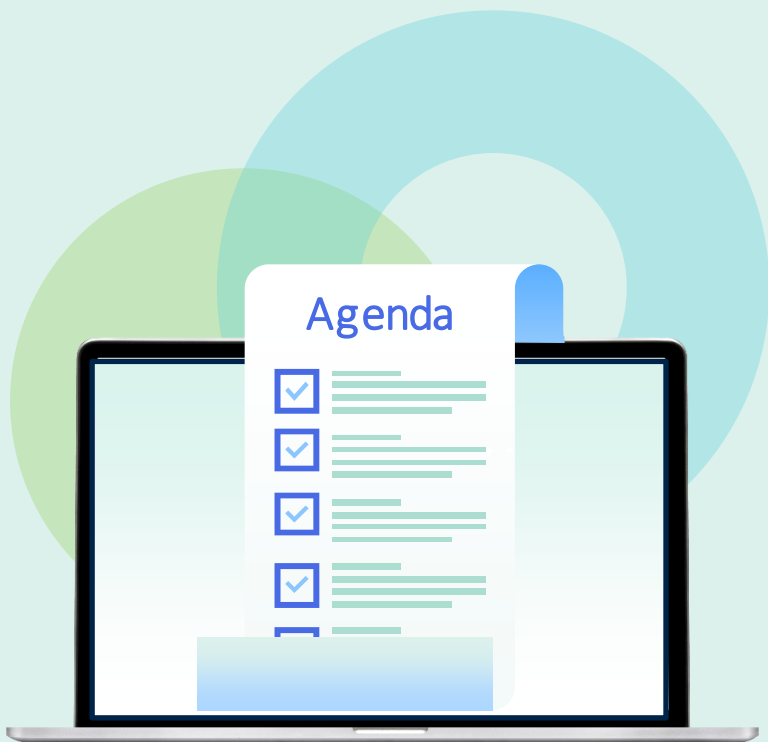
- **Order Now**

PO line is immediately packaged into a PO with a single PO line

- **Save and Continue**

PO line goes to an Auto Packaging or Manual Packaging status (depending on configurations and choices made during the order)

PO lines will be packaged into POs that will have one or more PO lines



- Ordering Basics and Roles
- Sources for Bibliographic Records
- Purchase Order Lines
- One-Time Orders
- **PO Line Templates**
- Continuous Orders
- Standing Orders
- PO Line Statuses

PO Line Templates

- Function as saved sets of PO Line configurations that may be applied to any new PO Line
- Help to save time during the PO Line creation process
- Assist with accuracy and ensuring that all mandatory fields have data
- Can be *private* (available only to purchasing operator who creates the template) or *public* (available to all purchasing operators)
- Develop a standard naming convention and use it consistently

PO Line Templates

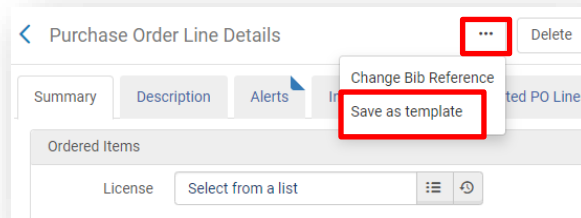
- Working with PO Line Templates

Documentation describes which fields on the PO Line Summary Tab page are saved as part of a template:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma Online Help \(English\)/020Acquisitions/020Purchasing/020Creating PO Lines/030Manually Creating a PO Line#Working with PO Line Templates](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/020Creating_PO_Lines/030Manually_Creating_a_PO_Line#Working_with_PO_Line_Templates)

Creating a PO Line Template

1. Fill in desired fields on a PO Line
2. Click the ellipsis and choose Save as template



3. Enter Template Name, set to public or private and click Save

Using a PO Line Template

- When selecting the PO line type and owner click on the drop-down arrow in the **Load from template** field
- Choose a template and click on **Create PO**

1 **Broadcasting & cable.**
Journal {Journal - Electronic} text; unmediated; volume (New York, NY : Cahners Pub Co, ©1993-)
ISSN: 1068-6827
Subject: Broadcasting--United States--Periodicals. Cable television--United States--Periodicals. Direct broadcast satellite television--United States--Periodicals. and others

Description * **Broadcasting & cable.**

PO line type * ▼

PO line owner * **Main Library** ▼

Load from template ▼

Interested Users

Interested Users Tab on the PO line

- Search for user
- Select notification and/or service

No more for staff to do when the item is activated or recieved

- Physical Resources
- Electronic Resources

The screenshot displays the 'Interested Users' tab interface. At the top, there are four tabs: 'Interested Users' (highlighted with a red box), 'History', 'Notes', and 'Attachments'. Below the tabs is a '+ Add Interested Users' button. A modal window is open, titled 'Search for a user', with a search input field and a menu icon. Below the search field are three checkboxes: 'Notify user upon receiving/activation', 'Hold item', and 'Notify upon cancellation'. At the bottom of the modal are two buttons: 'Add' and 'Add and Close'.

An illustration of a laptop with a white agenda overlay on its screen. The agenda has a blue header and a list of items, each with a blue checkmark and horizontal lines representing text. Behind the laptop are three overlapping circles in shades of green and blue. The word "Agenda" is written in blue above the list.

Agenda

- ☒ _____
- ☒ _____
- ☒ _____
- ☒ _____
- ☐ _____

- Ordering Basics and Roles
- Sources for Bibliographic Records
- Purchase Order Lines
- One-Time Orders
- PO Line Templates
- **Continuous Orders**
- Standing Orders
- PO Line Statuses

Continuous Orders

1. Locate or create a bib
2. Create a PO line to initiate the ordering process
3. Fill out and complete the PO line

Same workflow for print or electronic resources

The choices you make at the time of ordering effects what happens downstream

*Holding record (no items) is the only inventory created for print continuous orders

Continuous Orders

Same workflow when locating bibliographic records

- Click the shopping cart in the MD editor
- Records in the IZ or NZ—click the Order button from a title results list
- For records in the CZ
 - Click the Order button from an electronic collection results list
 - Click the Order button from a portfolio for a single title

Same options for completing the PO line

- Order Now
- Save and Continue

Continuous Orders

Required Fields (for firm orders)

- Material supplier (Vendor Account)
- List price
- Quantity for Pricing
- Funding
- Acquisition Method (verify for accuracy)
- **Renewal Date*****

Optional Fields

- Material type
- Reporting codes
- Interested Users tab—Was this resource a purchase request?

Continuous Orders

Do your print journals have existing holding records?

1. Create the PO Line and tell Alma that you will **assign inventory manually**

2. Acknowledge that the PO line will not create inventory by clicking **Confirm**

3. Note the PO line number and **Save** the PO line (you will get an error that says that mandatory information is missing)

The PO line is now in Review status

1 **Fiberarts.**
Journal ([Asheville, N.C. [etc.]] Fiberarts Magazine 1976)
Update Date: -

Description * **Fiberarts.**

PO line type * Recommended: Print Journal - Subscription

PO line owner * Main Library

Load from template

Assign inventory manually ☒

Confirmation Message

This PO Line will not create an inventory item

Cancel **Confirm**

Back **Save**

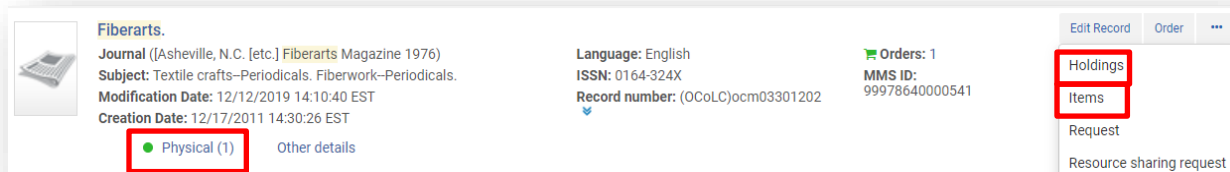
Fiberarts., Fiberarts Magazine,
v. 3- Jan./Feb. 1976-, 0164-
324X, ISSN

PO line
POL-8295

Continuous Orders

4. Search the IZ for the title you are ordering

5. How many holding records are linked to the bib record?

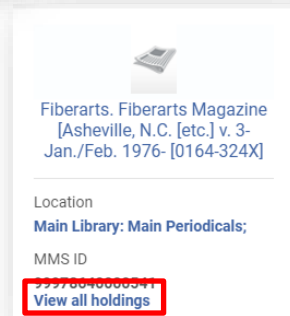


The screenshot shows a library catalog record for 'Fiberarts. Magazine'. The record includes a thumbnail image of a magazine, the title 'Fiberarts.', and a description: 'Journal (Asheville, N.C. [etc.] Fiberarts Magazine 1976)'. It also lists the subject 'Textile crafts--Periodicals. Fiberwork--Periodicals.', the ISSN '0164-324X', the record number '(OCoLC)ocm03301202', the language 'English', and the MMS ID '99978640000541'. The record is marked as 'Physical (1)' and has 'Orders: 1'. A red box highlights the 'Physical (1)' label. Another red box highlights the 'Holdings' and 'Items' options in the row action menu.

Fiberarts.
Journal (Asheville, N.C. [etc.] Fiberarts Magazine 1976)
Subject: Textile crafts--Periodicals. Fiberwork--Periodicals.
Modification Date: 12/12/2019 14:10:40 EST
Creation Date: 12/17/2011 14:30:26 EST
Language: English
ISSN: 0164-324X
Record number: (OCoLC)ocm03301202
Orders: 1
MMS ID: 99978640000541
Physical (1) Other details
Edit Record Order ...
Holdings
Items
Request
Resource sharing request

If there is **more than one** holding record, click **Holdings** in the row action menu

If there is **only one** holding, click **Items** in the row action menu then click **View all holdings** on the list of items

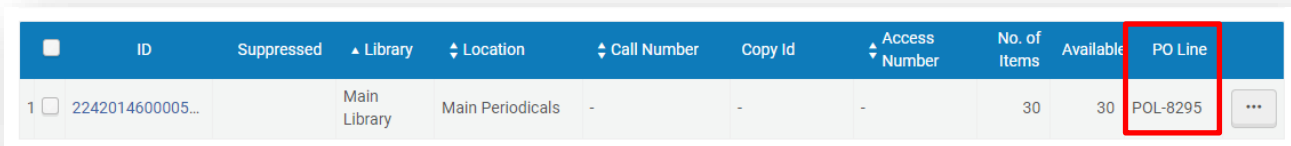


The screenshot shows a library catalog record for 'Fiberarts. Magazine'. It includes a thumbnail image of a magazine, the title 'Fiberarts. Fiberarts Magazine', and a description: '[Asheville, N.C. [etc.] v. 3-Jan./Feb. 1976- [0164-324X]'. The location is 'Main Library: Main Periodicals;'. The MMS ID is '99978640000541'. A red box highlights the 'View all holdings' link.

Fiberarts. Fiberarts Magazine
[Asheville, N.C. [etc.] v. 3-Jan./Feb. 1976- [0164-324X]
Location
Main Library: Main Periodicals;
MMS ID
99978640000541
View all holdings

Continuous Orders

6. Choose Associate a PO Line from the row action menu of the holding record and enter in the PO line number

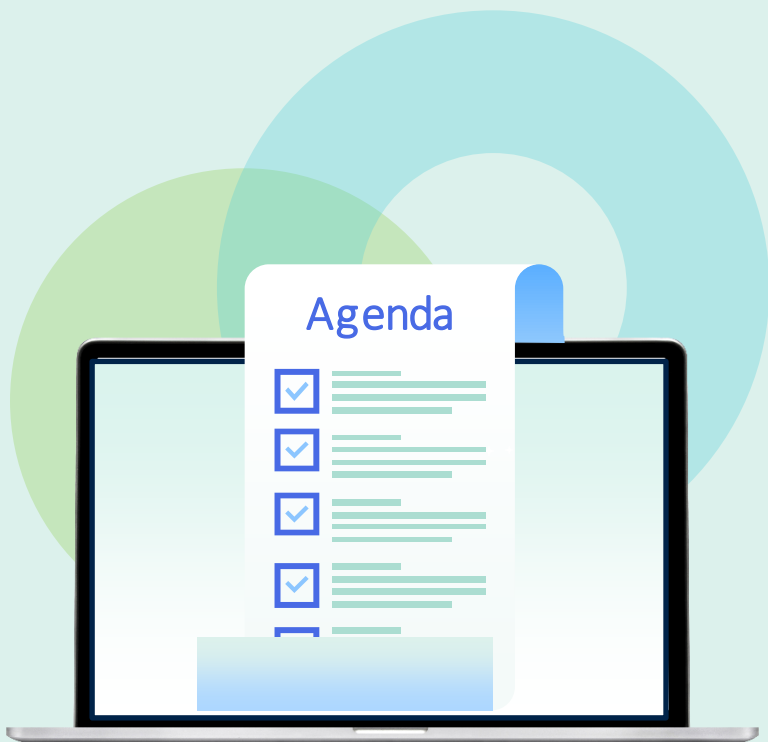


A screenshot of a library catalog table. The table has a blue header with columns: ID, Suppressed, Library, Location, Call Number, Copy Id, Access Number, No. of Items, Available, and PO Line. The first row of data shows a holding record with ID 2242014600005, located in Main Library, Main Periodicals, with 30 items available. The 'PO Line' column for this row contains the value 'POL-8295' and is highlighted with a red rectangular box. To the right of the 'PO Line' column is a column with a three-dot menu icon.

	ID	Suppressed	Library	Location	Call Number	Copy Id	Access Number	No. of Items	Available	PO Line	
1	<input type="checkbox"/> 2242014600005...		Main Library	Main Periodicals	-	-	-	30	30	POL-8295	...

7. *Acquisitions > Purchase Order Lines > Review* (PO Line)




8. Fill in the PO line details and complete it by clicking **Save and Continue** or **Order Now**



- Ordering Basics and Roles
- Sources for Bibliographic Records
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- One-Time Orders
- PO Line Templates
- Continuous Orders
- **Standing Orders**
- PO Line Statuses

Standing Orders

- Standing orders are unique in that we add a brief, bibliographic record that is suppressed to the repository to act as a placeholder for the PO line
- Individual volumes will be received irregularly over a period of years likely as they are published

Prentice Hall history of music series (99212441300521)	
   <input type="button" value="Record"/> <input type="button" value="MARC21 Bib"/>	
LDR	00327nam#a2200121#ua4500
001	99212441300521
005	20180702134157.0
008	180702s1975####xx#aaa#fmnnn#001#0#eng d
035	\$\$a (OCoLC)437722944
245 1 0	\$\$a Prentice Hall history of music series
336	\$\$a text \$\$2 rdacontent
337	\$\$a unmediated \$\$2 rdamedia
338	\$\$a volume \$\$2 rdacarrier

Standing Orders

1. Locate or create a bib
2. Create a PO line to initiate the ordering process
3. Fill out and complete the PO line

Same workflow that we used with one time and continuous orders

Standing Orders

- No inventory is created when selecting a Standing Order PO line type
- PO line will require a renewal date for monographs

Description * **Prentice-Hall Series on Environmental and Intelligent Manufacturing**

Systems

PO line type * **Other: Physical - Standing Order Monograph** ▼

PO line owner * **Main Library** ▼

Load from template ▼

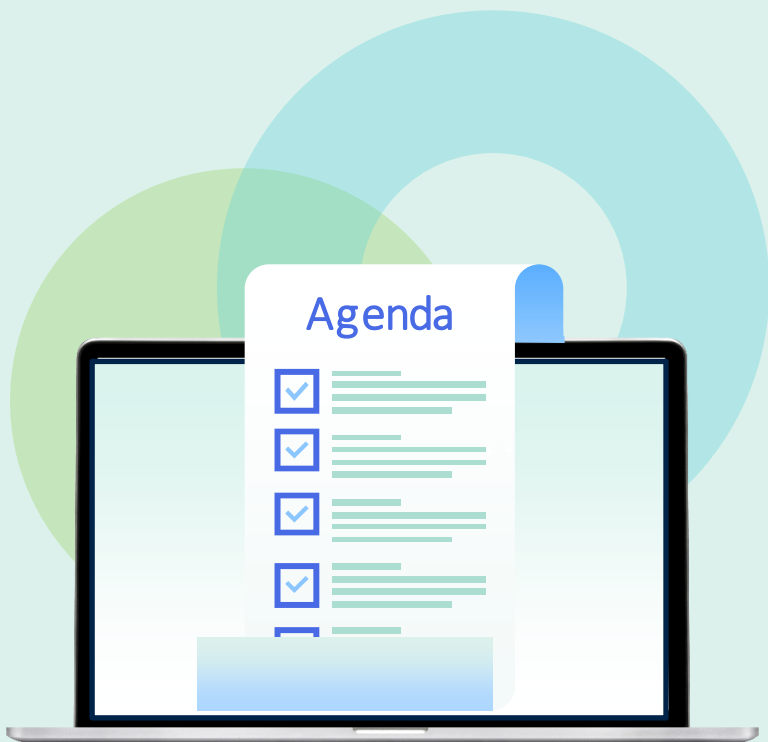


Prentice-Hall Series on Environmental and Intelligent Manufacturing Systems,

[Edit](#) [Change Bib Reference](#) [...](#)

MMS ID: 99250141300541	Copies: -	Renewal date: 06/23/2022
Assigned to: -	Total price: 75.00 USD	Receiving note: -
Type: Physical - Standing Order Monograph	Funds: M: Science (100.0%) (FY2021)	Sent date: 06/23/2021
PO line owner: Main Library	Vendor/Account: ProQuest Company / ProQuest Company PRO	The bib record is brief, At least one of the reporting codes is missing
Standard number: -	Vendor reference ID: -	
PO: PO-94313 / (Sent)	Expected delivery: 06/23/2021	
PO line: POL-8298 / (Waiting for Renewal)		

Physical Standing Order (0)



- Ordering Basics and Roles
- Sources for Bibliographic Records
- Purchase Order Lines
- One-Time Orders
- PO Line Templates
- Continuous Orders
- Standing Orders
- **PO Line Statuses**

PO Line Statuses

Terms	Definitions	Notes
In Review	Initial status of a newly created PO line	PO lines remain in this status if not ordered, validation fails, or criteria for ordering are not met
Manual Packaging	PO line ready to be manually packaged into a PO	PO line has passed normalization, validation and alert processing
Auto Packaging	PO line ready to be automatically packaged into a PO	PO line has passed normalization, validation and alert processing
Ready	PO line was packaged into a PO and is ready to be sent	Before a PO can be sent to a vendor, all of its PO lines must have a status of Ready
Sent	PO in which PO line was packaged was approved and sent	Relevant for both electronic and physical one-time PO lines

PO Line Statuses

Terms	Definitions	Notes
Closed	PO line was closed	Items have been received or activated and paid
Recurring Renewal	PO line was fully processed, received/activated and awaiting the renewal date	Applies to Continuous and Standing Orders
Waiting for Manual Renewal	PO line is marked for manual renewal and is within the renewal notification period	Applies to Continuous and Standing Orders
Waiting for Invoice	PO line is ready to be associated with an invoice	Appears once items have been activated or received

PO Line Statuses

Terms	Definitions	Notes
Under Evaluation	PO line is under evaluation	Usually means that a trial was requested or started
Under Evaluation (Renewal)	PO line renewal is undergoing evaluation, awaiting a decision	
Deferred	PO line was created and set aside to be handled at a later date	Sometimes, this relates to funds availability
Canceled	PO line was canceled	Intentionally by the library or due to non-availability
Deleted	PO line was deleted from Alma	Can be done only by an operator with Purchasing Operator Extended role

PO Line Statuses

Documentation describing PO Line statuses and which statuses are possible for One-Time vs. Continuous Orders:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma Online Help \(English\)/020Acquisitions/020Purchasing/040Creating PO Lines/035PO Line Types and Statuses](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/040Creating_PO_Lines/035PO_Line_Types_and_Statuses)



Resources

Resources

<https://knowledge.exlibrisgroup.com>

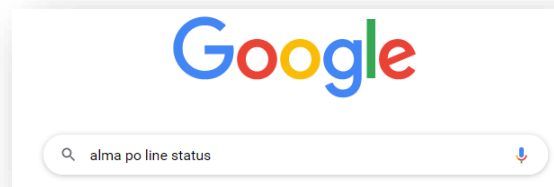
Knowledge Center, also called the Customer Knowledge Center or the **CKC**

Alma > Product Documentation > Alma Online Help > Acquisitions

<https://exlibris.libguides.com/alma/acquisitions>

Acquisitions LibGuides

All documentation is also indexed in Google



Implementing Acquisitions in Alma

Link to the series

https://knowledge.exlibrisgroup.com/Alma/Training/Webinars/Implementing_Acquisitions_in_Alma

Premium Services - a more individualized approach



Premium Services are one-on-one services to customers that are interested in workflow optimization, individualized training, hands-on configuration, or other individualized assistance with Ex Libris products

Premium.Services@exlibrisgroup.com

Next Week: Activating Electronic Resources and Claiming

- Workflow and Operator Roles
- E-Resource Activation Tasks
- Activating Electronic Resources
- Claims





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