Implementing Acquisitions in Alma Series
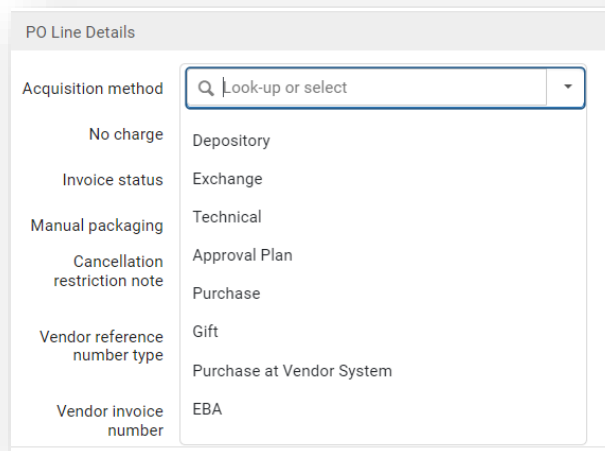**Ordering**
April 19-20, 2023

1. **Is price for standing order po line the annual amount because renewal is annual?**

ExL—You can enter the price for the amount of single item or the amount that you expect to spend annually. That's up to you. The PO line encumbers money in the fund. The invoice will disencumber and then expend funds.

2. **Can other acquisition methods be added?**

ExL—No, the list of acquisition methods is static.

3. **When loading via EOD, is the field "Expected activation after ordering" filled out, should it be in the registration information, or should it be taken from the supplier's registration?**

ExL—There is not a field for the expected activation date in the New Order Import profile. I recommend testing to see if that information is pulled from the vendor account record in Alma or if it remains blank when importing an EOD record.

4. **We have not extensively implemented acquisitions workflow in Alma, so if we do, we will likely need to "order" a lot of things we already have inventory for. Is there guidance on best practice for this?**

    We would like to have financial data (both current and historical) attached to inventory to get cost per use data.

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ExL—Rachel demonstrated how to create PO lines for resources that already have inventory in your Alma environment. The PPT (available on the series dashboard) has some information on this process as well. There is also a [Knowledge Article](#) on the topic.

5. **Can you set different default expected/activation dates (no of days) based on the vendor?**

ExL—The delivery and claim information is set in the vendor account so you can specify different expected/activation dates at that level.

6. **Is there a big difference when doing an electronic collection as opposed to an electronic item?**

ExL—There are some differences. For a single electronic item, you need to place the order from the portfolio. Also, activation for a single electronic item looks different than activation for a collection. These scenarios were demonstrated in the session.

7. **Does the PO Line Material type have any effect on continuous standing orders?**

ExL—Yes because PO line type is a combination of material type and continuity. There are PO line types for electronic and physical standing orders. The demonstration was on the most common use for standing orders. If you do not see the options you need on screen, you can enable additional po line types at **Configuration > Acquisitions > Purchase Orders >PO Line Types.**

8. **Did we talk about managing templates, especially deleting them?**

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ExL—Creation of PO line templates was demonstrated during the session. There is a [Knowledge Article](#) for deleting them. If you need to edit an existing PO line template, you can re-save the template with the same name.

9. **Did you say the system suggests a specific PO line type based on the material type in the bib record? (I don't think the examples shown so far have illustrated this functionality)**

ExL—When Creating a PO line, Alma will recommend a PO line type. Click the drop-down arrow to the right in order to choose a different PO line type

10. **Since Aleph didn't have an option to create an order for standing orders, all of mine migrated as subscription, can I change that? Do I have to close those po lines and create new po lines for "standing orders."**

ExL—You could cancel the exiting PO lines and create new Standing order ones. There is a manual job **Admin > Manage Jobs and Sets > Run a Job > Update PO lines Information – Advanced** that allows you to change the PO line type in bulk. TEST THIS SCENARIO IN YOUR SANDBOX BEFORE MAKING ANY CHANGES TO YOUR PRODUCTION ENVIRONMENT.

11. **Can the "renewal reminder" be linked to an email notification for subscription orders waiting for manual renewal"?**

ExL—For manual renewals, the renewal reminder determines the number of days before the renewal date that you want to be reminded about the renewal. This triggers when the renewal will be added to the task list. You could use Alma Analytics and create an Analytics Object to schedule a report and send the report to interested parties.

12. **You mentioned the PO Line choices matter later. If we do not use ACQ with business office. So, any unique choices to make with that in mind?**

ExL—When a PO line is created in Alma, choosing the correct PO line type is key because it sets off different workflows for different PO line types. This is important whether you integrate with your business office or not.

The PO line type is a combination of material type and continuity (one time, continuous, or standing order). The PO line type directs Alma to create electronic inventory, physical inventory (holding or holding and item), or none. The PO line type also tells Alma if the PO line will be used once (in the case of a firm order) or if it should remain open for a subscription or continuous order.