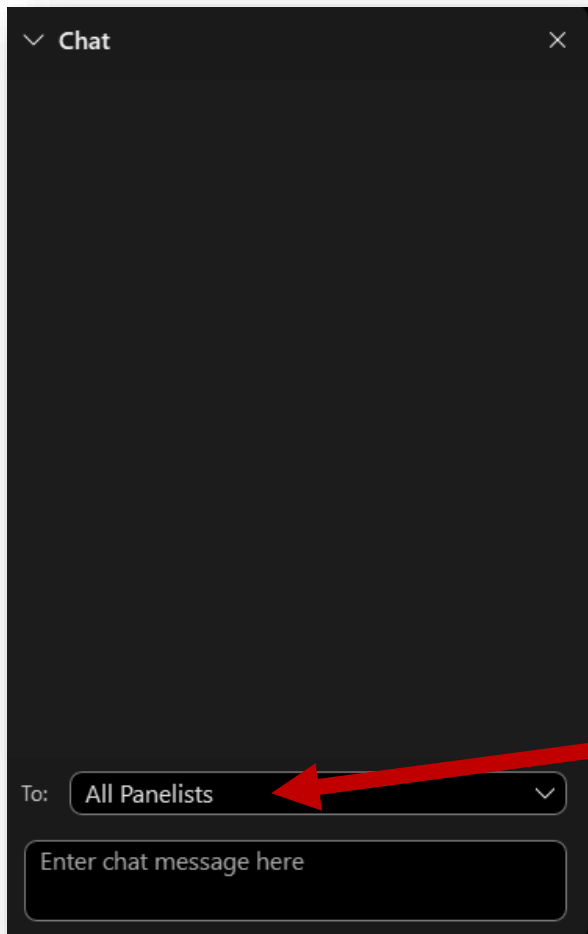


Implementing Acquisitions in Alma



Session 4: Receiving Print Resources and Post-Receiving Processing



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



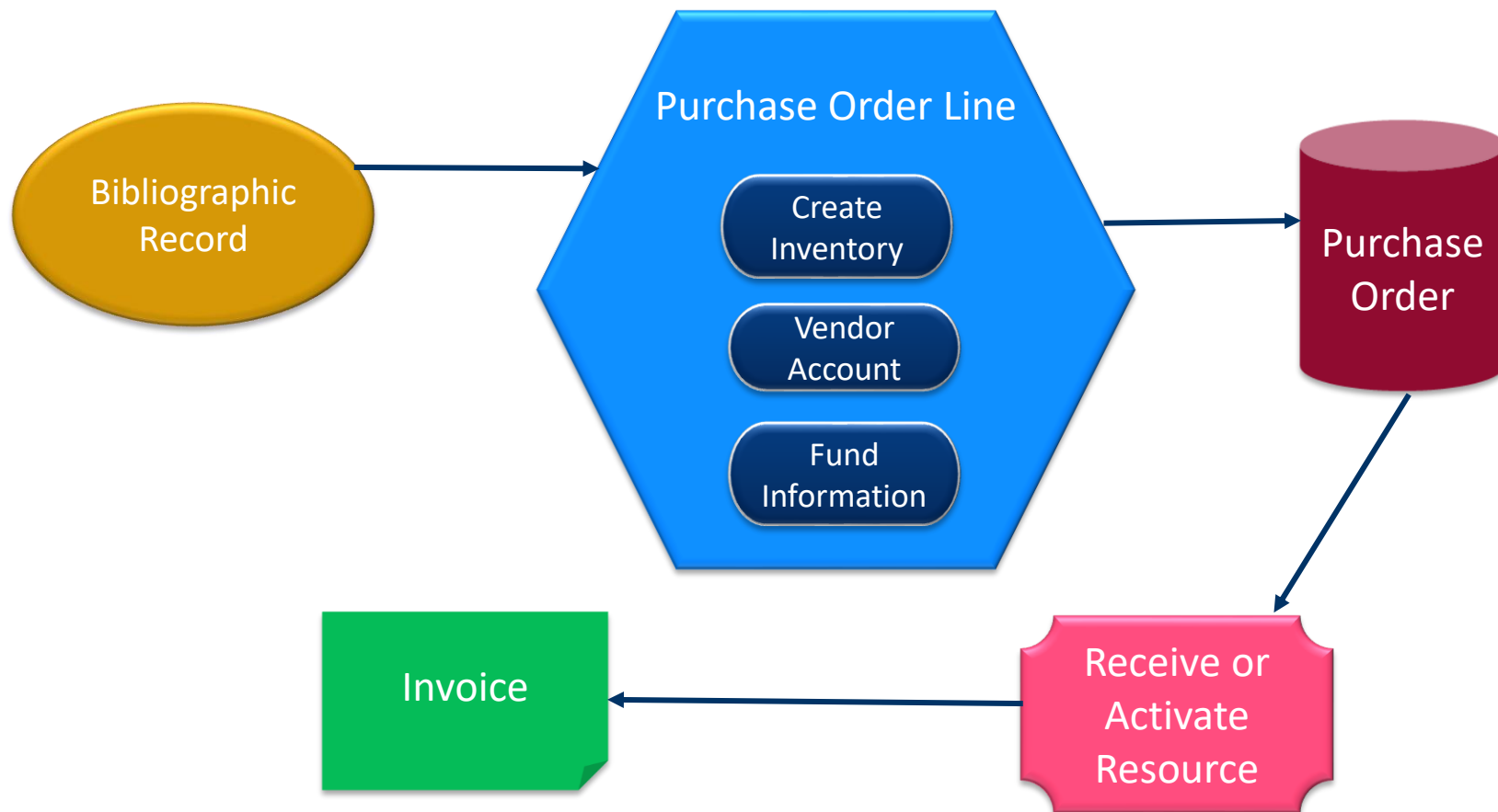


- Workflow and Operator Roles
- Receiving Physical Resources
 - One-Time Orders
 - Continuous Orders
 - Standing Orders
- Post-Receiving Processing



- **Workflow and Operator Roles**
- Receiving Physical Resources
 - One-Time Orders
 - Continuous Orders
 - Standing Orders
- Post-Receiving Processing

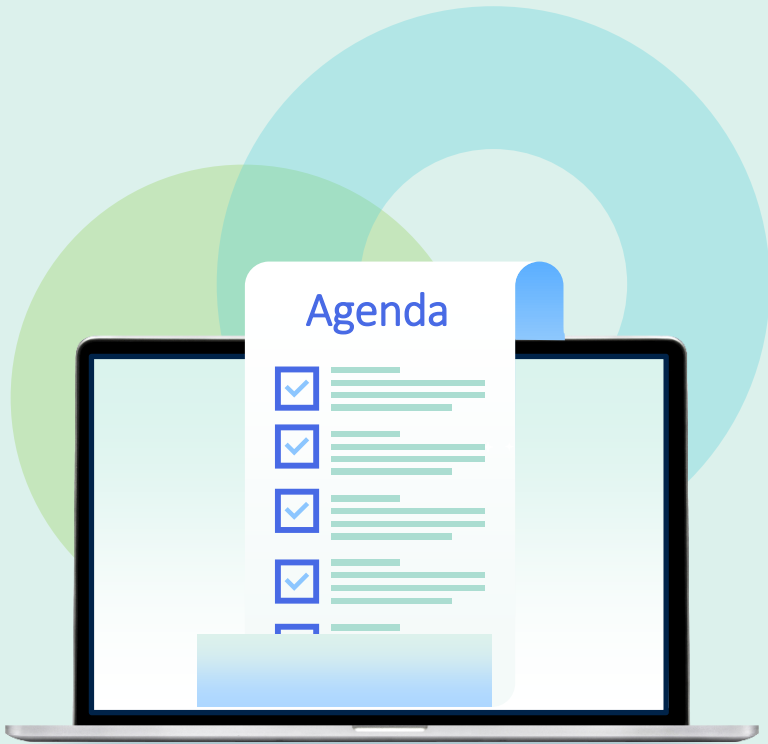
General Acquisitions Workflow



Roles Related to Receiving Physical Resources



- To receive physical resources, the role of **Receiving Operator** or **Receiving Operator Limited** must be assigned
 - The limited operator does not have the privilege of editing PO lines or changing item information
 - Both roles require the assignment of a service unit

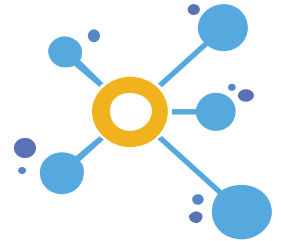


- Workflow and Operator Roles
- **Receiving Physical Resources**
 - One-Time Orders
 - Continuous Orders
 - Standing Orders
- Post-Receiving Processing

Receiving Workflow

Depending on the organization and practices at your institution, how you proceed through receiving and invoicing workflows may vary

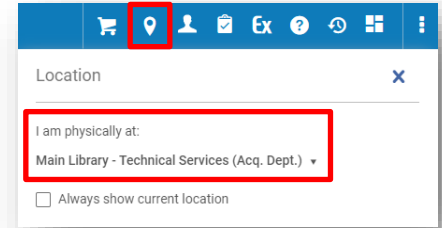
- Receiving workflow for physical items is performed by one operator while another operator is responsible for the invoicing workflow
- One operator performs receiving and invoicing tasks



Receiving Physical Items

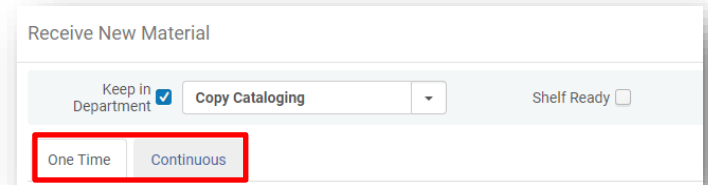
1. Verify that you are logged into a Receiving Department

- Acquisitions department is a receiving department
- A circulation desk *can be* configured to be a receiving department



2. Navigate to the **Receiving Workbench** by going to *Acquisitions > Receiving and Invoicing > Receive*

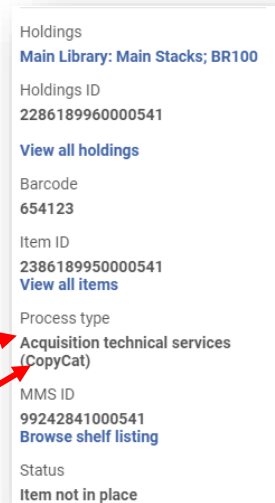
Note the **One Time** and **Continuous** tabs



Receiving Physical Items

Keep in Department checkbox and menu

- Used when materials will remain in the technical services department for cataloging/processing
 - Creates an acquisitions work order on the item
 - Item Process Type is **Acquisition technical services**
- **Process Status** tracks item's location in technical services
 - List of statuses is edited on the AcqWorkOrder
 - *Configuration > General > Work Orders and Departments > Work Order Types > AcqWorkOrder > Manage Statuses* from the row action menu



Holdings
Main Library: Main Stacks; BR100

Holdings ID
2286189960000541

[View all holdings](#)

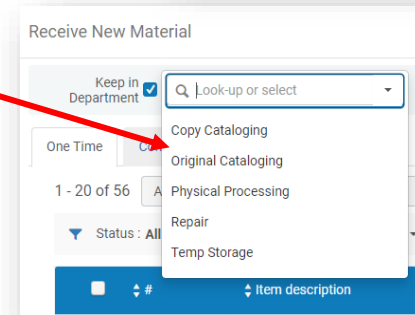
Barcode
654123

Item ID
2386189950000541
[View all items](#)

Process type
Acquisition technical services (CopyCat)

MMS ID
99242841000541
[Browse shelf listing](#)

Status
Item not in place



Receive New Material

Keep in Department ☒

One Time ☐

1 - 20 of 56

Status: All

Look-up or select

- Copy Cataloging
- Original Cataloging
- Physical Processing
- Repair
- Temp Storage

Item description

Receiving Physical Items—One-Time Orders

From the Receiving Workbench

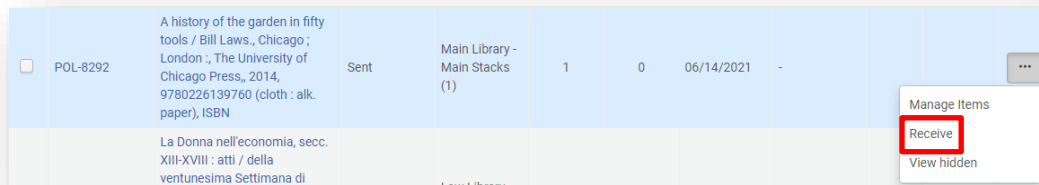
- ✓ Receiving location
- ✓ One Time tab
- ✓ Verify Keep in Department and status setting

Search for item(s) using indexes and filters available

The screenshot shows the 'Receive New Material' interface. At the top right are 'Receive all' and 'Receive' buttons. Below them is a row with 'Keep in Department' (with a checked checkbox and a dropdown menu), 'Copy Cataloging' (with a dropdown arrow), 'Shelf Ready' (with an unchecked checkbox), and 'Received Date' (set to 07/01/2021 with a calendar icon). A red box highlights the 'Keep in Department' dropdown and the 'Copy Cataloging' dropdown. Below this is a row with 'One Time' (selected tab) and 'Continuous' (unselected tab), with a red box around the 'One Time' tab. Below the tabs is a search bar with '1 - 20 of 56' results, a search icon, and filters for 'Filter by vendor' and 'Filter by owning library'. At the bottom is a status bar with 'Status: All (Except Closed)', 'Locate: PO Lines', 'Filter orders with interested users: No', 'Filter orders with patron requests: No', and a 'Clear all' link.

Receiving Physical Items—One-Time Orders

Click **Receive** from the row action menu

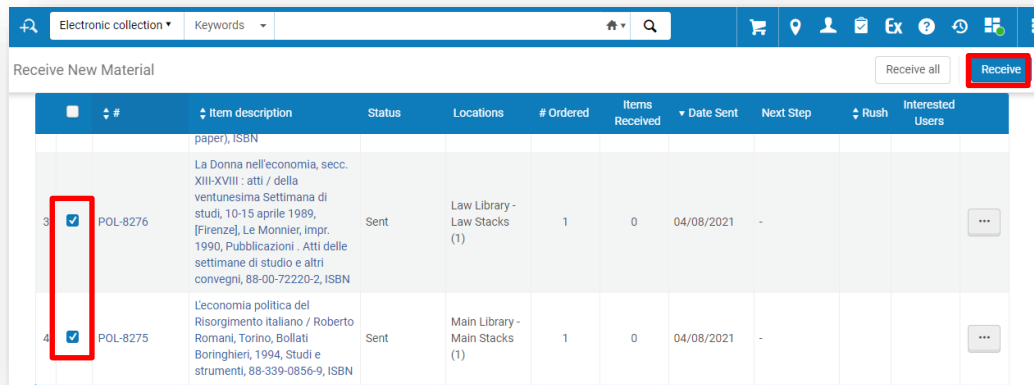


A screenshot of a table row. The row is highlighted in light blue. It contains the following data: a checkbox, the ID 'POL-8292', the title 'A history of the garden in fifty tools / Bill Laws, Chicago ; London ; The University of Chicago Press, 2014, 9780226139760 (cloth : alk. paper), ISBN', the status 'Sent', the location 'Main Library - Main Stacks (1)', the number '1', the number '0', the date '06/14/2021', and a minus sign. To the right of the row is an action menu with three options: 'Manage Items', 'Receive' (highlighted with a red box), and 'View hidden'.

<input type="checkbox"/>	POL-8292	A history of the garden in fifty tools / Bill Laws, Chicago ; London ; The University of Chicago Press, 2014, 9780226139760 (cloth : alk. paper), ISBN	Sent	Main Library - Main Stacks (1)	1	0	06/14/2021	-	...
--------------------------	----------	--	------	--------------------------------	---	---	------------	---	-----

OR

Check the box next to item(s) and click **Receive**



A screenshot of the 'Receive New Material' interface. At the top, there is a search bar with 'Electronic collection' and 'Keywords' dropdowns, and a search icon. Below the search bar is a table with columns: Item description, Status, Locations, # Ordered, Items Received, Date Sent, Next Step, Rush, and Interested Users. The table has two rows. The first row is for item POL-8276, and the second row is for item POL-8275. Both rows have a checkbox in the first column, which is highlighted with a red box. To the right of the table is a 'Receive all' button and a 'Receive' button (highlighted with a red box).

Item description	Status	Locations	# Ordered	Items Received	Date Sent	Next Step	Rush	Interested Users
La Donna nell'economia, secc. XIII-XVIII : atti / della ventunesima Settimana di studi, 10-15 aprile 1989, [Firenze], Le Monnier, impr. 1990, Pubblicazioni . Atti delle settimane di studio e altri convegni, 88-00-72220-2, ISBN	Sent	Law Library - Law Stacks (1)	1	0	04/08/2021	-		
L'economia politica del Risorgimento italiano / Roberto Romani, Torino, Bollati Boringhieri, 1994, Studi e strumenti, 88-339-0856-9, ISBN	Sent	Main Library - Main Stacks (1)	1	0	04/08/2021	-		

Receiving Physical Items—One-Time Orders

If **Keep in Department** **was not** checked when item was received

- Base Status = **Item not in place** and the
- Process Type = **In Transit** (to a circulation desk)

If **Keep in Department** **was** checked when item was received

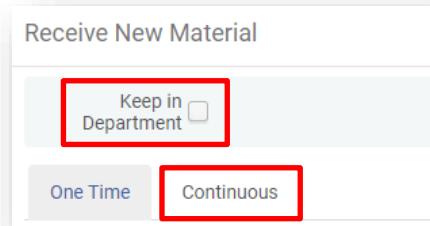
- Base Status = **Item not in place** and the
- Process Type = **Acquisition technical services**

If an **Interested User** was added to the PO line at the time of ordering a green check mark will appear in that column, signaling that you might want to fast track the processing on the item

Receiving Physical Items—Continuous Orders

Do issues that you receive for continuous orders (subscriptions) need little to no processing?

- Uncheck **Keep in Department** on the **Receiving Workbench** before receiving
- Base status = **Item in place** immediately after receiving/creating item record
- This behavior is set by the **po_line_calc_co_next_step_on_receive** parameter
 - *Configuration > Acquisitions > General > Other Settings*
 - Set to **true** to place items in transit if needed after receiving



The screenshot shows a web form titled "Receive New Material". It has two main sections. The top section is light blue and contains a checkbox labeled "Keep in Department" which is unchecked. The bottom section is white and contains two buttons: "One Time" and "Continuous". The "Continuous" button is highlighted with a red border, indicating it is the selected option.

Receiving Physical Items—Continuous Orders

- What follows is the **ad hoc** method of receiving continuous orders
 - Item records are created at the time of receipt
 - Frequency of issues is set in the **Subscription interval** field in the Vendor Information section of the **PO line**

Weekly = 7 Monthly = 30 Bimonthly = 60 Quarterly = 90

Vendor Information	
Material supplier	EBSCO/EBSCO1/Scholarly Journals/23456
Expected receipt after ordering (days)	0
Subscription interval	30

Receiving Physical Items—Continuous Orders

From the Receiving Workbench

- ✓ Receiving location
- ✓ Continuous tab
- ✓ Verify Keep in Department and status setting

Search for title using indexes and filters available

Receive New Material

Keep in Department ☒ Shelf Ready ☐ Received Date 07/01/2021

One Time Continuous

1 - 20 of 85 All Filter by vendor Filter by owning library

Status: All (Except Closed) Locate: PO Lines Filter orders with interested users: No Filter orders with patron requests: No Clear all

Receiving Physical Items—Continuous Orders

1. Click **Receive** on the row action menu

1	POL-8295	Fiberarts., Fiberarts Magazine, v. 3- Jan./Feb. 1976-, 0164-324X, ISSN	Waiting for Renewal	Main Library - Main Periodicals (1)	1	06/22/2021	-	...
2	POL-8223	The Review of English studies., Clarendon Press etc, v. 1-25 (no. 1-100); Jan. 1925-Oct. 1949; new ser., v. 1- (no. 1-); Jan. 1950-, 0034-6551, ISSN	Waiting for Renewal	Graduate Library - Grad Periodicals (1)	1	01/15/2021	-	<div>Manage Items Receive View hidden</div>

2. Fill in enumeration and chronology information and click **Generate** to populate the Description field

New Items details

Enumeration A

35

Enumeration B

7

Enumeration C

Chronology I

2021

Chronology J

July

Chronology K

Description

v. 35 no. 7 (2021 July)

Generate

3. Click **Receive and Set Barcodes** or **Create and Receive** depending on your workflow

Receive and Set Barcodes

Cancel

Create and Receive

Receiving Physical Items—Continuous Orders

1. When receiving the next issue click **Duplicate**
2. Edit the enumeration and chronology fields and click **Generate** to populate the Description field

The image displays two overlapping screenshots of the ExLibris software interface, illustrating the steps for receiving physical items through continuous orders.

The left screenshot shows the 'Last received item Details' window. It contains fields for Enumeration A (35), Enumeration B (7), and Enumeration C (-). The Description field is populated with 'v. 35 no. 7 (2021 July)'. A red box highlights the 'Duplicate' button located below the description.

The right screenshot shows the 'New items details' window. It contains fields for Enumeration A (35), Enumeration B (7), and Enumeration C (-). The Description field is populated with 'v. 35 no. 7 (2021 July)'. A red box highlights the 'Generate' button located at the bottom right of the window.

3. Click **Receive and Set Barcodes** or **Create and Receive** depending on your workflow

Receiving Physical Items—Continuous Orders

Description field

- Transfers to item record along with data from the enumeration and chronology fields
- Determines that the item is unique and requires item-level holds when requests are made
- Formatting comes from Description Templates
Configuration > Resources > General > Description Templates

Receiving Workbench

New items details

Enumeration A	35	Chronology I	2021
Enumeration B	8	Chronology J	August
Enumeration C		Chronology K	

Description v. 35 no. 8 (2021 August) Generate

Item Record

General Information

Barcode		Copy ID	
Material type	Issue	Item policy	
Provenance		Is magnetic	
Holdings PO Line	POL-8295	Issue date	
Receiving date	07/01/2021	Expected receiving date	
Enumeration A	35	Enumeration B	8
Chronology I	2021	Chronology J	August

Description v. 35 no. 8 (2021 August) Generate

Receiving Physical Items—Continuous Orders

Item sort routines

May be in ascending or descending order

Using fields from the item record (enum, chron, description, and more)

Default settings for

- Resource Management Get it results (Discovery)
- Physical resource editor items list (List of items in Alma)
- Acquisitions Receiving Items (Receiving workbench in Alma)

Configuration > Resources > General > Physical Item Sort Routines

Receiving Physical Items—Continuous Orders

Do you have journals that are always received on a consistent schedule?

- Prediction patterns can create serial items in advance based on a prediction template
- Patterns are defined in the holdings record to predict future items
- Items will display as **On order until {date}** in Primo
- Once the predicted items are created, they can be viewed in the Receiving workbench

Receiving Physical Items—Standing Orders

- Not received via the Receiving Workbench
- Suppressed bib record linked to the PO line
- No inventory was created when ordered

What needs to happen

1. Bib, holding, and item record created
2. Link item to PO line

Who is going to do this and when is a workflow that you need to develop based on local staffing and practices

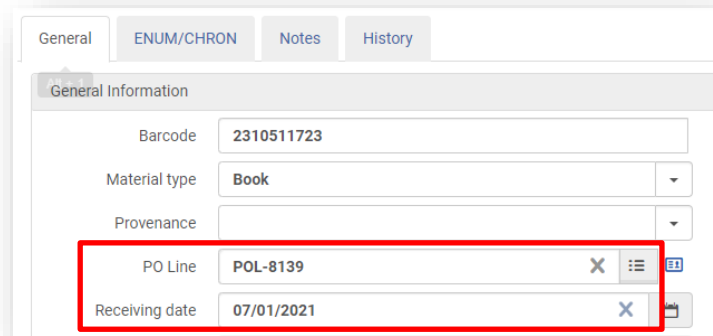
Receiving Physical Items—Standing Orders

- Item record can be manually linked to the PO line for the standing order
- May want to enter a Receiving Date and other details in the item record

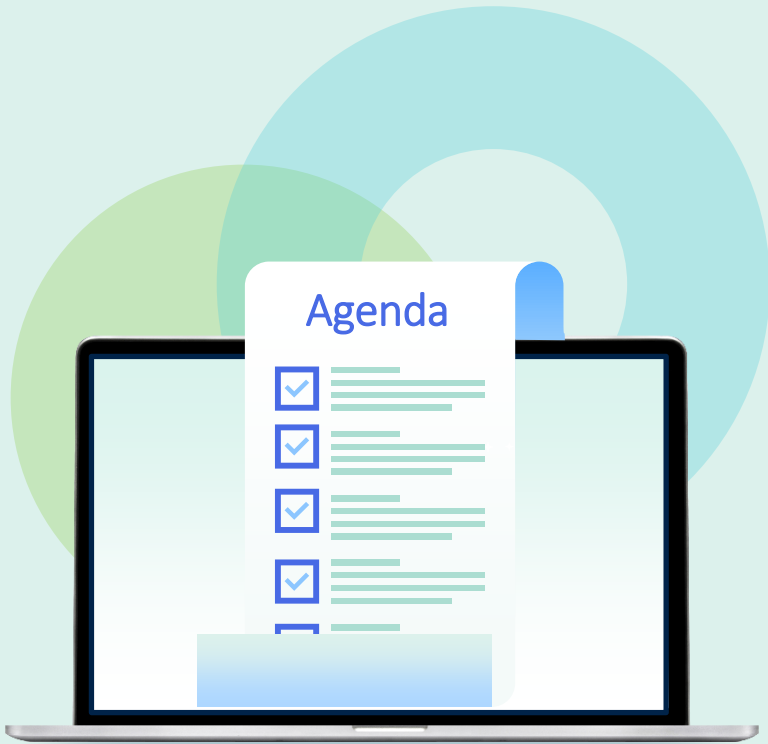
Work with cataloging/processing staff to determine workflow

When manually creating item records in the MD editor the items are **in place**

Staff will need to place an acquisitions work order on the item if it needs further cataloging and processing so that the base/shelf status is accurate



The screenshot shows the 'General Information' tab in the MD editor. The 'Barcode' field contains '2310511723'. The 'Material type' dropdown is set to 'Book'. The 'Provenance' dropdown is empty. The 'PO Line' field contains 'POL-8139' and is highlighted with a red box. The 'Receiving date' field contains '07/01/2021' and is also highlighted with a red box. The 'General' tab is selected at the top, with other tabs being 'ENUM/CHRON', 'Notes', and 'History'.

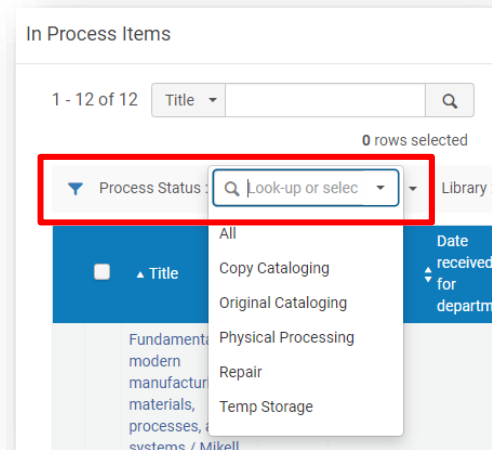


- Workflow and Operator Roles
- Receiving Physical Resources
 - One-Time Orders
 - Continuous Orders
 - Standing Orders
- **Post-Receiving Processing**

Post-Receiving Processing

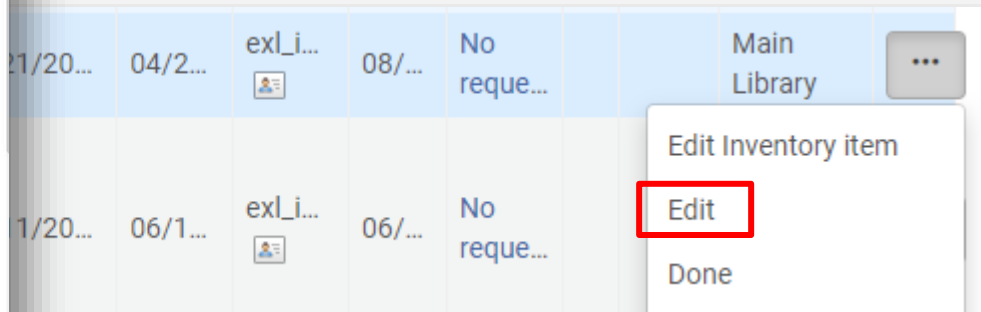
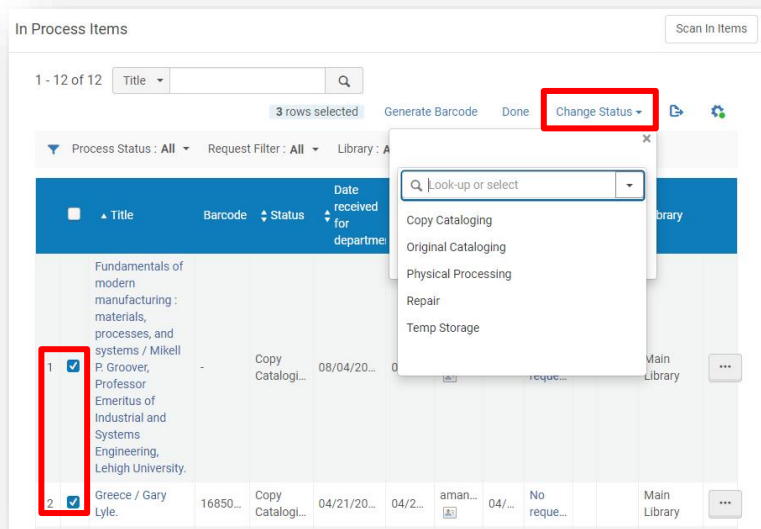
Acquisitions > Post-Receiving Processing > Receiving Department Items

- Items that were marked **Keep in department** when they were received
- Use **Process Status** drop down to limit results to a single location/step in technical Services
- Status list configured on the AcqWorkOrder
- Note column for interested users



Post-Receiving Processing

- Change status as items move through department
 - Select item(s) > Click Change Status > Select new status
 - Row Action Menu > Edit > Change Status > Save



Post-Receiving Processing

1. When items are ready to go to the shelf go to *Acquisitions > Post Receiving Processing > Scan in Items*
2. Next to **Done** click the radio button marked **Yes**
3. Scan item barcodes

It is possible to choose Done from the row action menu of the work order but use the scan in method instead.

“Just because you can does not mean you should.”

Scan in Items Change Item Information

Automatically print slip ☐ Yes ☒ No

Set Status To Copy Cataloging

Done ☒ Yes ☐ No

Scan item barcode * OK

Scan request ID OK

Create Item

Post-Receiving Processing

Acquisitions department and Circulation desk are separate (out of the box configuration)

- Initial scan places the item in transit to a circulation desk
- Item barcode needs to be scanned in again (at the circulation desk) to update item status to “item in place” or to hold item for a request

Circulation desk is a receiving location

- Single scan places the item on shelf or activates the hold

Set Circulation Desk as Receiving Location

- Smaller libraries may consider this workflow
- Set at the library level

[https://knowledge.exlibrisgroup.com/Alma/Knowledge Articles/Receiving Acquisition In Process items in order to avoid In Transit \(Work Order at Circulation Desk\)](https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Receiving_Acquisition_In_Process_items_in_order_to_avoid_In_Transit_(Work_Order_at_Circulation_Desk))





Resources

Resources

- Receiving Physical Material

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/030Receiving_Material/010Receiving_Physical_Material](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/030Receiving_Material/010Receiving_Physical_Material)

- Prediction Patterns

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Physical_Resource_Management/016Managing_Physical_Resources/Prediction_Patterns](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Physical_Resource_Management/016Managing_Physical_Resources/Prediction_Patterns)

Resources

- Item Description Templates

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Physical_Resource_Management/070_Configuring_Resource_Management/080_Configuring_Description_Templates](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Physical_Resource_Management/070_Configuring_Resource_Management/080_Configuring_Description_Templates)

- Physical Item Sort Routines

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Physical_Resource_Management/070_Configuring_Resource_Management/090_Configuring_Physical_Item_Sort_Routines](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Physical_Resource_Management/070_Configuring_Resource_Management/090_Configuring_Physical_Item_Sort_Routines)

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@clarivate.com

In Two Weeks: Invoicing

- One-Time Orders
- Continuous Orders
- Invoicing from a File Upload
- Payment and Credit
- Monitoring Ledgers and Funds





Thank you!

Please fill out the survey that
will appear when you close the
WebEx meeting