

Implementing Acquisitions in Alma Series

Receiving Physical Resources and Post-Receiving Processing

May 3-4, 2023

1. We have centralised acquisitions; how do we receive multiple copies for multiple libraries?

ExL—If the PO line is for more than one item, you have the option to receive all or some of the items, depending on what was shipped to you.

2. Continuous - we have centralised acquisitions. We receive periodicals here and send to other libraries. Can we stop these from showing as in place immediately, to allow time for delivery to the libraries?

ExL—Under *Configuration > Acquisitions > General > Other Settings*, there is a parameter with the label `po_line_calc_co_next_step_on_receive`. Set this parameter to **true** to put items into transit instead of on the shelf

More about this and other parameters can be found in the documentation on [Configuring Other Settings \(Acquisitions\)](#).

3. Can an item be unreceived?

ExL—An item can be un-received if it meets the following conditions.

- The item must have been received.
- The item must still be in the receiving department (i.e. is in a Work order status from marking Keep in department).
- There are no patron or library requests related to the item.

4. Does Alma prompt for the barcode during Receive (if it is not already there in the item)?

ExL—There is not a barcode prompt when receiving items on the One-Time tab of the Receiving Workbench.

5. Can we put a physical item as an Interested User for a non-purchase or a donation item?

ExL—Any resource that has a po line can have interested users. There are [PO line acquisition methods](#) of Gift and Technical accommodate donation and non-purchasing workflows.

6. When I receive an issue with "Manage items" is it possible for it to remain on the reception page, i.e. not to return to the home page "Receive New Material"?

ExL—I tested this in our training environment and found that if I received a single item from the row action menu, I remained on the Received Items List. If I checked the line(s) and clicked Save and Receive I was brought back to the receiving workbench (Receive New Material).

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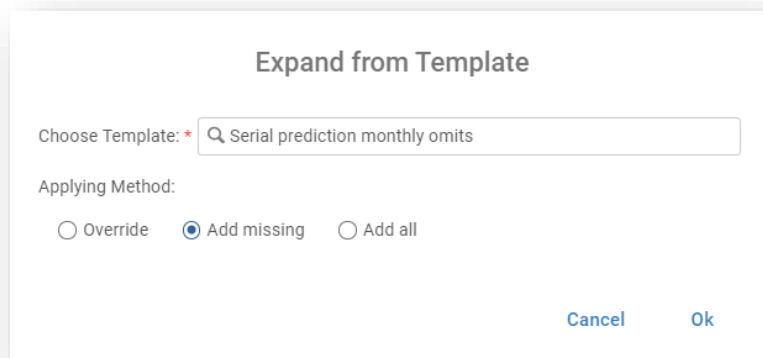
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7. Does Alma create an item record with each receipt?

ExL—Alma creates inventory for physical materials that will be received when the PO line is created.

- Physical one-time orders have holding and item records created.
- Physical continuous orders have holding inventory records created.

8. What are the other boxes for add missing, add all (from the prediction pattern template).

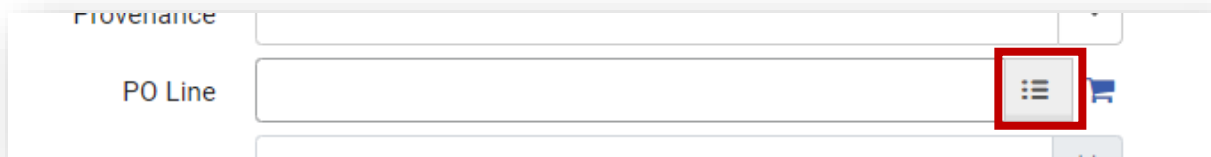


ExL—This screen appears when the operator chooses Editing Actions > Expand from Template while in the holding record.

- Override - Replaces any existing-matching fields of the record with the template fields.
- Add missing - The fields of the template will supplement only the template's fields missing in the record.
- Add all - Adds all the template's fields to the record, keeping the existing record's fields, even if matched. Note that you need to delete any undesired fields manually.

9. Can a PO line be linked to the item after the (standing order) PO line is closed?

ExL—I tested this out and was not able to link an item to a closed standing order PO line. From the item record, I clicked on the hamburger menu to search for candidate PO lines.



Standing Order PO lines that were Closed did not appear in the results list.

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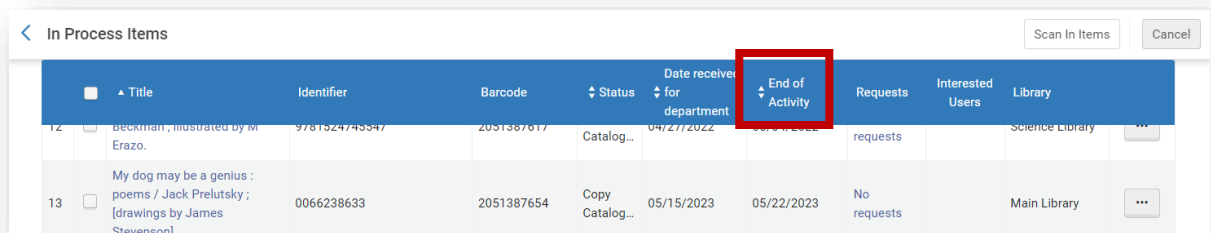
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10. Is there a way to prevent the call number field being populated in the holdings until it is catalogued rather than when it is received?

ExL—The technical answer is yes, but I would want to have further discussions with you as to why you want to do this. It's not a workflow that I recommend. The settings that would prevent the call number from being populated in the holdings record will impact what you do and could unnecessarily complicate your workflow.

11. What is "End of Activity" on the in-process items page?

ExL—This is the date that the Work Order is expected to be complete. In my environment, the AcqWorkOrder's Work Time (days) is set to 7. If I receive an item today, the date populated in the End of Activity field is seven days from today.



The screenshot shows the 'In Process Items' table in Alma. The table has columns for Title, Identifier, Barcode, Status, Date received for department, End of Activity, Requests, Interested Users, and Library. The 'End of Activity' column is highlighted with a red box. The table contains two rows of data.

	Title	Identifier	Barcode	Status	Date received for department	End of Activity	Requests	Interested Users	Library
12	Beckman, illustrated by W. Erazo.	9781524745547	2051387617	Catalog...	04/21/2022	04/28/2022	requests		Science Library
13	My dog may be a genius : poems / Jack Prelutsky ; [drawings by James Stevenson].	0066238633	2051387654	Copy Catalog...	05/15/2023	05/22/2023	No requests		Main Library