Receiving Physical Material

You accept new physical material into Alma by matching the PO line with the material received. You then indicate whether further work must be performed before the material is available to the library for which it was ordered.

Physical material that is received has one of the following statuses:

- **One-Time** — Receipt of material for a PO line that is not repeated on a frequent or regular basis.

**Note**
When a PO line expects multiple items, the PO line is not fully received until all items are received. If the remaining items will not be received for some reason, remove the items from the PO line and from the inventory and then re-receive the previously received items.

- **Continuous** — Receipt of material for a PO line, repeated on a regular basis. The material must be connected to an existing holding and can be magazines, periodicals, and so forth. To more easily manage receiving serials, see Setting Up Prediction Patterns to Automatically Create Serial Items.

**Note**
For information on handling items with different receiving intervals, see the explanation for the Technical acquisition method in Acquisition Methods.

- **Standing order** — Receipt of material for a PO line, issued as needed on an infrequent or irregular basis. For example, a Standing Order PO line is used for purchasing all the printed books by a particular author when they are published, or where a series of books are being published, but not necessarily on a regular basis. The holdings for this type of PO line are updated upon the receipt of the material.

When receiving standing order material, note the following:

- When receiving Standing Order non-monograph material, multiple items can be associated with a single holding, as they can with Continuous material.
- When receiving Standing Order monograph material, a unique workflow is invoked (see step 5 in To receive new physical material: below). The standard receiving workflow, performed on the Receive New Material page, is not invoked.

**Note**
For information about these statuses, see Receiving Material.

Receiving New Physical Material

To receive a physical monograph standing order, see Receiving Physical Standing Order Monograph Material. Physical standing order non-monograph material is handled the same as continuous material (see below).
Before receiving physical material, you must ensure that you are at the appropriate receiving department; see Library/Desk Selector in The Persistent Menu. If the department is at a circulation desk with a self-check in machine, you may also be able to receive the item at a self-check machine; see Self-Check Machines.

To receive new physical material:

1. Ensure that you are at a receiving department.
2. On the Receive New Material page (Acquisitions > Receiving and Invoicing > Receive), locate the PO line you want to receive.

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**Receive New Material Page**

Use the secondary search and the following filters to help you locate the PO line.

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**Note**

- When searching for an invoice number, select **Invoice Number** instead of **All**.
- Searching for **Common Fields** includes the following fields: **Vendor reference number**, **PO line** (number), **Additional PO line reference**, **Title**, **Standard number**, and **Vendor title number**.

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**Find PO Lines for Receiving Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>The status of the PO lines. For the list of statuses, see Searching for PO Lines.</td>
</tr>
<tr>
<td></td>
<td>Items with a status of <strong>In Transit</strong> retain their status until they are scanned at the target location. If the item’s location is the shelving library, the item retains its status until it is scanned at the primary circulation desk.</td>
</tr>
<tr>
<td></td>
<td>You can receive items for <strong>Closed</strong> PO lines, for example for magazine subscriptions that are fully paid but for which the last issue has not yet been received.</td>
</tr>
<tr>
<td></td>
<td>A PO line with the status <strong>Waiting for Invoice</strong> (meaning all of its associated items were received) appears on this page only if it contains items that were received with the <strong>Keep in department</strong> option selected.</td>
</tr>
<tr>
<td></td>
<td>The default value is the value of the user’s most recent search.</td>
</tr>
<tr>
<td>Locate</td>
<td>The method to use (from a list predefined by an administrator). You can select:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Entire PO content</strong> – Find PO lines that are packaged in the same PO as the PO lines that match the search criteria</td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>◦ <strong>Order lines</strong> – Find PO lines that match the search criteria (default)</td>
</tr>
<tr>
<td>Vendor</td>
<td>The vendor from which you anticipate receiving the material.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>The displayed list includes only the vendors that are assigned the role of <strong>Material Supplier/Subscription Agent</strong>.</td>
</tr>
<tr>
<td>Orders with patron requests</td>
<td>Filter search results to items that have patron requests.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>This option appears only for one-time orders.</td>
</tr>
<tr>
<td>Orders with interested users</td>
<td>Filter search results to items that have interested users. After the search is completed, items with interested users are indicated in the table by a yellow check mark in the <strong>Interested Users</strong> column.</td>
</tr>
<tr>
<td>Shelf ready</td>
<td>Whether no further work is required on the material and that it can be sent to the library. If you select this, scan in the barcode (see next row).</td>
</tr>
<tr>
<td>Scan item barcode</td>
<td>Enter a barcode or search for the item. See <strong>Searching in Alma</strong>. If you have RFID installed and an active RFID connection, you can scan the RFID. For more information about RFID, see <strong>RFID Support</strong>.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>This field appears only when <strong>Shelf ready</strong> is selected.</td>
</tr>
</tbody>
</table>

**Note**

* ◦ Select the check marks in the **Notes** or **Interested Users** column to display the Notes or Interested Users tab for the PO line (see the **Navigate to Notes During Receiving** video (1:47 mins).
 ◦ PO lines that are fully received and do not require additional tasks to be performed (on the **In Process Items** page) do not appear.

The table is the same in the **Continuous** tab as in the **One-Time** tab, with the following exceptions in the **Continuous** tab:

* ◦ There is no check box preceding the PO line numbers.
 ◦ There is no **Items Received** column.
 ◦ Select a row actions list action to:
   * **Manage items** — View details of the PO line and manage each of the PO line's items. For example, you may want to configure what happens to the items after they are received, mark an item as received, or change the permanent location of one of the items. See steps 3a or 4a, below.
   * **Receive** — Specify items that have been received for the PO line.
• **Print Interested Users List** — Print the Interested Users In letter (letter code: InterestedUsersInLetter), which lists interested users for the PO line. Appears only if the PO line has interested users (there is a check mark in the **Interested Users** column).

Search results appear only in the tab (**One-Time, Continuous**) that is selected at the time of the search.

3. Optionally select one of the following options that appear on this page:

◦ Select the item description to view metadata for the resource; see [Viewing Metadata Read-Only in the Simple Record View Page](#).

◦ In a PO line row, select the checkbox in a **Notes** or **Interested Users** column to see the notes or interested users for that PO line.

◦ Select the **Receive All** button to receive all PO lines currently shown on the page. If a filter is applied, only those records that match the filter are received. The [PO Line - Receive All](#) job runs.

◦ The **Received date** indicates the date that the item is/was/will be received. It is initially set to the current date. Change the date as required.

◦ Select **Keep in department** to indicate that further work is required before the material can be made available in a library. When this option is selected, an Acquisition Technical Services work order is created (the default work order type), and the **Next step** field appears.

In the **Next step** field, select the next step for the specified PO line after it is received. The available options are the statuses configured for the Acquisition Technical Services work order, which by default are:

◦ Physical processing

◦ Copy cataloging

◦ Temporary storage

Items that require further processing can be viewed on the In Process Items page, using Acquisitions or Fulfillment (see [Processing Materials](#)). You can also view this page by selecting the task **Requests - Digitization - need approval** in the Tasks List in the persistent menu (see [Tasks in the Tasks List](#)).

If **Keep in department** is not selected, the item must be scanned at a circulation desk before it is placed on the shelf in the library (see [Scanning Items](#)).

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**Note**

◦ If **Keep in department** is not selected, interested users are notified when the item is received.

◦ If **Keep in department** is selected, interested users (see information regarding the Interested Users tab in [Manually Creating a PO Line](#)) receive the Interested In email notification (letter code: InterestedInLetter) in the following scenarios:

  • After the **Next step** selection (such as physical processing or copy cataloging) is complete and the item leaves the department.

  • When selecting **Done** in the row actions list for Continuous material on the In Process Items page (see [Post-Receiving Processing](#)).

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4. If you received the item after scanning in the barcode (see **Shelf ready**, above), select **Receive** to receive the item. The workflow is complete. Otherwise, continue as follows:

◦ **Receiving One-Time Material**

◦ **Receiving Continuous Material**
Receiving One-Time Material

... continued from Receiving New Physical Material.

5. Optionally select Manage Items in the row actions list to view details of the PO line. The Received Items List page appears. Select the Bibliographic Information tab to view bibliographic record information about the ordered item.

![Received Items List Page]

To edit the inventory for a PO line item, select Edit Inventory Item in the row actions list for the appropriate PO line item. The Physical Item Editor page appears, where you edit the item details as needed and select Save. For a description of the fields on the Physical Item Editor page, see Updating Item-Level Information and the New Items Details Fields table, below. For example, you may want to edit the permanent location of one of the items. Select Back to return to the Receive New Material page.

6. Select the check boxes for the PO lines you want to receive, and select Save and Receive. (If there are any warnings on the items, a confirmation dialog box appears with the warnings; an administrator can configure the validations; see Configuring Receiving Departmental Validations. Select Confirm). A message appears at the top of the page, indicating the status of the process.

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**Note**

Only the check boxes for the PO lines that can be received are active. All other check boxes are unavailable.

If you selected Keep in department in the Receiving Settings section, a message appears at the top of the page confirming that further work must be performed before the material can be made available to the library.

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7. For received PO line items in handling stages, select one of the following from the row actions list:
   - Edit inventory item
   - Write to RFID
     - Appears for locations with RFID and an active RFID connection. The information is written to the RFID. For additional information, see RFID Support.
   - Done
   - Send to temporary storage
   - Send to copy cataloging
   - Send to physical processing
   - Print slip – A print slip is printed on the department's printer and sent by email to the configured user (see Configuring Allowed Emails). Notes contained in a PO line, as well as notes configured using the Receiving Slip Notification Letter configuration option (see Customizing Letter XSL Style Sheets) are sent with the print slip.
An example of a print slip that is sent to the configured user is displayed in the following image:

Print Slip Example

Note
You must be in an acquisition or receiving department for the print slip option to be available.

- Un-receive — Revoke the received status of an item if it was mistakenly marked as received. See Receiving Material.

Note
In order to be able to un-receive an item, the following conditions must be met:

- The item must have been marked as received
- The item must still be marked as in the receiving department
- There are no patron or library requests related to the item

For more information on these options, see Post-Receiving Processing.

Watch the Receiving One-Time Print Items video (5:00 mins).

Receiving Continuous Material

... continued from Receiving New Physical Material. This process is also used to receive physical standing order non-monograph material. To receive predicted continuous items, see Receiving Predicted Items.

5. Select Manage Items in the row actions list to view details of a PO line. The Received Items List page appears. Select the Bibliographic Information tab to view bibliographic record information about the ordered item. When enabled, holdings information may also appear; see Viewing Holding Information.
If the expected receiving date of an item has passed and the item has not been received and the PO line is not already in Claim, the action Claim Missing Items appears. Select Claim Missing Items to move the PO line into Claim. The PO line moves to Claim and Claim Missing Items no longer appears.

Select Analytics Issues Report to view a Missing Issues report of non-received items for this PO line. In the report, select Open in a new window to open the report in a new tab, Expand to open the report in Analytics to change the report parameters, or Close to close the report.

To edit the inventory for a PO line item, select Edit inventory item in the row actions list for the appropriate PO line item. The Physical Item Editor page appears, where you edit the item details as needed and select Save. For more information, see Updating Item-Level Information.

Select Back to return to the Receive New Material page.

6. On the Receive New Material page, select Receive in the row actions list for a PO line to display the Receive New Items page.
The Receive New Items page lists the last received item’s details and enables you to enter details for a new item, as required. All item details are listed in the **Items Arrived** area at the bottom of the page.

### Note

You can also access the Receive New Items page by selecting **Receive New Items** on the Received Items List page.

7. Under the page header:
   - The **Received date** defaults to today’s date. To change the date, select in the **Received date** box and select the required date from the **Calendar** pop-up.
   - Select **Keep in department** to indicate that further work is required before the material can be made available in a library. When this option is selected, the **Next step** field appears.

In the **Next step** field, select the next step for the specified PO line after it is received. The available options are **Physical processing**, **Copy cataloging**, and **Temp storage**. Items that require further processing can be viewed on the In Process Items page, using Acquisitions or Fulfillment (see Processing Materials). You can also view this page by selecting the task **Requests - Digitization - need approval** in the Tasks List in the persistent menu (see Tasks in the Tasks List).

8. In the **New Item Details** area, enter cataloging details for the new item in the **Enumeration** and **Chronology** fields, as required.

The following table shows sample values for the **Enumeration** and **Chronology** fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enumeration A</td>
<td>Vol.1</td>
</tr>
<tr>
<td>Enumeration B</td>
<td>Qtr. 2</td>
</tr>
<tr>
<td>Enumeration C</td>
<td>Part 1</td>
</tr>
</tbody>
</table>
When these values are entered, select Generate to create a description in the Description field using the entered values, as follows:

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The values of the most recently received item appear in the Last Received Item Details area. Select Duplicate to automatically move these values to the respective fields in the New Item Details area.

9. Select Create and Receive.

If you selected Keep in department in the Receiving Settings section, a message appears at the top of the page confirming that further work must be performed before the material can be made available to the library. The new item then continues in the workflow according to your selection in the Next step drop-down list. For more information, see Post Receiving Processing.

Alternatively, you can select Receive and set barcodes to set barcodes for the items that you are receiving. The Set Barcodes dialog box opens where you enter barcodes for the items and select Submit. Refer to Scanning Items or the Scan item barcode description in the Find PO Lines for Receiving Fields table above for more information about scanning barcodes.
Watch the [Receiving Continuous Print Items](#) video (5:00 mins).

### Viewing Holdings Information

To enable viewing holdings information when receiving continuous material, set the `view_holding_in_receiving` parameter to `true` (see Configuring Other Settings).

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**Note**

Ensure that you are at an Acquisitions department; see Library/Desk Selector in [The Persistent Menu](#).

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To view holdings information when working with continuous material:

2. Locate a PO line that has a value in the Locations field, and select Manage Items in the row actions list. The Received Items List page appears.
3. Select the Holdings Information tab.

![Holdings Section of Received Items List Page](#)

The metadata information for the holdings appears in this section.

4. You can select Edit Holdings to open the MD Editor page and edit the holdings (see Metadata Management).

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### Receiving Standing Order Monograph Material

To receive non-monograph material, see [Receiving New Physical Material](#). You receive new items into a standing order by creating the standing order (see Manually Creating a PO Line), creating holdings for the new item, and attaching the new item to the standing order.

1. Ensure that there is a standing order PO line to attach to the new item.
2. Create a new physical holdings (Resource Management > Create Inventory > Add Physical Item) (see Adding a New Book or Journal Article).
3. Select New in the Choose holding type field, select either a book or an article in the Citation type field, and select Choose. The Quick Cataloging page appears.
4. Configure resource and item information, and select Save. The holdings and item are created, and the new item appear in a record list; see Searching in Alma.
5. Select **Items** or **View All Items** in the row actions list to view the newly created item.

6. Select **Edit** in row actions list. The Physical Item Editor appears (see Updating Item-Level Information).

7. In the **PO line** field, select the PO line of the standing order monograph to link to this item.

8. Enter the receive date in **Receiving Date**.

9. Modify any other fields as required.

10. Select **Save** to save the item and close the Physical Item Editor.