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.

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

**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. Items with a status of In Transit 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. You can receive items for Closed PO lines, for example for magazine subscriptions that are fully paid but for which the last issue has not yet been received. A PO line with the status Waiting for Invoice (meaning all of its associated items were received) appears on this page only if it contains items that were received with the Keep in department option selected. 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: Entire PO content – Find PO lines that are packaged in the same PO as the PO lines that match the search criteria</td>
</tr>
</tbody>
</table>

**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.
<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 <a href="#">Searching in Alma</a>. If you have RFID installed and an active RFID connection, you can scan the RFID. For more information about RFID, see <a href="#">RFID Support</a>.</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
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).

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](received_items_list.png)

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](image)

**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).

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**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>

Receive New Items Page

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

- If no value is set for **Description**, the item is treated as a monograph. If a value is set for **Description**, the item is treated as a serial and is displayed as such in the Get It tab (with the Get It tab display being slightly different, in order to supply the information for the serial title). Requests are made on the description level rather than on the title level. The **Description** field is what Primo and Alma use to identify the context of a request when it is placed. Patrons placing a request from Primo (or staff placing a request on behalf of the patron in Alma), select from a list of defined descriptions for a given title’s items.
- Either the **Enumeration A** or **Chronology I** field must have a value.
- The values of each of the **Enumeration** fields appear before the values of the **Chronology** fields.
- To simplify the task of entering Enumeration and Chronology information, you can create a description template. For more information, see [Configuring Description Templates](#).

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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.

   ![](image)

   **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.