

---

## Orders

---

### General

---

#### Does Alma provide links from an order to other related information?

Alma provides the ability to navigate (by hypertext links) among linked purchase orders, funds, vendors, bibliographic records, licenses for electronic resources, and information about electronic packages (from the Central KnowledgeBase). An example of this can be seen in the following screenshot of a Purchase Order Line in review, with a hypertext link to the fund:

	#	Fund Name ▲	Percent
	1	<a href="#">Accounting and Finance E-resources</a> (01/01/2017 - 12/31/2017) (29,349.95 USD)	100.0%

Additionally, the purchase order is linked directly to the metadata records in the system; there is no need for duplicate records in Alma. Order lines are linked directly to bibliographic records, or to package records in the case of groups of e-resources. Item records, which describe the resources in the library's inventory, are linked to the metadata record, which is in turn linked to the purchase order line.

---

#### Can the PO line's bibliographic reference be changed?

It is possible to change the bibliographic record reference of a PO line to a different bibliographic record without changing the inventory. Only the PO line description is changed.

This functionality is useful, for example, if an order is made on a short (stub) bibliographic record. In this case, the PO line description is the description of the short bibliographic record. If the short bibliographic record gets updated with a full bibliographic record, the PO line will still have the now inaccurate old description of the title. In a case such as this, a user can click **Change Bib Reference** to update the PO line description to the description of the new version of the record.

---

#### What order types are supported in Alma?

Alma supports a variety of order types covering all options of material that might be ordered by a library. The list is supplied out of the box by Ex Libris, and can be customized by the library. For example a library might choose to de-activate some of the order types because they are not relevant for their library. An example of the list of order types – including continuous order types (that are active – with a yellow check mark, or not-active without the yellow check mark) can be seen in the following screen capture:

Enabled	ID	Description	Continuity	Inventory Format	Acquisition Material Type	Context
1	ACCESS_SERVIC	Access Ser	Continuous	Generic	Service	LOCALMM:
2	DB_CO	Database	Continuous	Electronic	Package	LOCALDB,L
3	DB_OT	Database	One-Time	Electronic	Package	LOCALDB,L
4	DB_SERVICE_OT	Database S	One-Time	Generic	Service	LOCALMM:
5	DIGITAL_NONAR	Digital - No	One-Time	Generic	Service	LOCALMM:
6	E_BOOK_CO	Electronic E	Continuous	Electronic	Book	LOCALMM:
7	E_BOOK_OT	Electronic E	One-Time	Electronic	Book	LOCALMM:
8	E_BOOK_PKG_CC	Electronic E	Continuous	Electronic	Package	GLOBALPA
9	E_BOOK_PKG_OT	Electronic E	One-Time	Electronic	Package	GLOBALPA
10	E_BOOK_SO	Electronic E	Standing Or	Electronic	Book	LOCALMM:
11	E_JOURNAL_CO	Electronic J	Continuous	Electronic	Journal	LOCALMM:

## The Order Workflow

When initiating an order, Alma will offer the staff user the option of choosing a Purchase Type – based on the type of media being ordered. (The list can be customized by the library.)

The screenshot shows a dropdown menu for 'Purchase type \*'. The search bar contains 'Look-up or select'. The dropdown list includes the following options: 'Recommended', 'Physical - One Time', 'Physical - Standing Order Monograph', 'Electronic Title - One Time', 'Electronic Title - Subscription', and 'Other'.

Based on this information, the PO Line that is created will be tailored to the type of material being order. For example, a monograph will have fields to define library and location; journals (print and electronic) will have subscription date fields.

## Does Alma need brief bibliographic records to be created for ordering purposes?

Alma's streamlined acquisition processes allow for ordering new materials for which bibliographic data does not already exist; there is no dependency on having complete bibliographic record information to initiate an acquisition process. The library staff member simply enters brief bibliographic information into a template and generates a purchase order line based on the brief record.

The screenshot shows a menu titled 'Release All Records for User'. The 'MARC Bibliographic' option is selected, showing a sub-menu with the following items: 'Derive New Record', 'Merge Records & Combine Inventory', 'Add holding Ctrl+Alt+H', 'Add Local Portfolio', and 'Create POLine & Exit' (with a shopping cart icon). Below the menu, there are instructions: 'code for position 5 for field LDR' and 'code for position 17 for field LDR'.

For brief records, the library determines which fields are mandatory before the record can be saved. The bib record can be completed at a later stage, once the item has arrived, or at any point in the process when more complete metadata becomes available.

---

## Will interested users be notified if an item is received or activated?

The 'Interested Users' tab on the order record allows for listing users interested in receiving notification when an the ordered item is received or activated.

Name	Email	Notify user upon receiving/activa	Notify user upon renewal
1 Alicia Chen	thelibrary613@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>

For physical items, the options are to notify the patron and/or place a hold request for the patron:

Name	Email	Notify user upon receiving/activa	Hold item
1 Jane Brown	almaun25@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

An example of the email notification when an item is received:



---

## Can staff edit order details throughout the whole lifecycle of the order?

Most of Alma's purchasing lifecycle is based on automatic stages, staff users may intervene when exceptions appear or approval is needed based on the institution's needs and preferred workflows. During and after the purchase process, users can edit and intervene in the following workflows:

- Assign, reassign or release assignments of PO lines
- Edit PO lines
  - acquisition method
  - currency
  - location
  - material supplier
- Packaging PO Lines into a PO
  - automatically

- manually
- Review POs
  - Edit
  - Assign
  - Release
  - starting a trial OR Request evaluation
  - Order now
  - Defer
  - Relink
  - Cancel
  - Delete
- To manually add PO lines to an existing PO
- Approval/Sending (manually)
  - additional vendor
  - billing
  - shipping information
  - edit PO lines included in the PO
  - attachments
  - notes
  - To delete POs
  - Receiving Material/Receiving Stage
    - Activation (for electronic material)
    - Scanning (for Analytics reports, History and More Info status)
    - Notifying interested users/patrons, print an interested users list
    - Shelving
    - Claim Missing Items/change expected receiving dates
    - Post-Receiving Processing (Technical services, by default: Physical Processing, Copy cataloging, Temporary Storage)
    - Print slips
    - Labels
    - Un-receive (revoke the received status of an item if it was mistakenly marked as received)
    - Closing, Canceling and Deleting PO Lines
    - Reopening closed or canceled PO Lines
    - Reassigning and Reactivating PO Lines
    - Changing Bibliographic Reference (to which the PO line is linked)
- Invoicing

## Can staff assign their tasks to their staff members?

Purchasing Operators, Invoice Operators, and Purchase Request Operators can now assign their tasks to other Purchase Operators, Invoice Operators, and Purchase Request Operators.

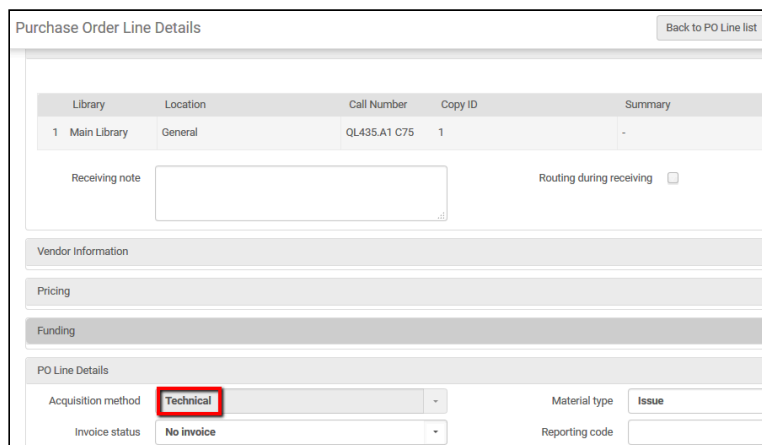
## How are orders for electronic and print versions for the same title handled?

Alma fully supports this type of workflow. The steps to achieve this are described following:

First, there must be a PO line so that payments may occur. As it is likely that the electronic version will be the main source in the future, it is best to associate electronic inventory with the primary PO line. This line will also be the one that launches activation workflows and future cost/usage evaluation.

However, in order to be able to receive physical materials, Alma requires a PO line. Since a separate PO line is created for the electronic version of this title with price and payment information, a second PO line must be created for the physical version, without any price and payment information, but with a link to the of the electronic version..

Alma supports the creation of a PO line with an acquisition method = “Technical”, which does not require that data in the price and a fund fields be populated:



Purchase Order Line Details

Library	Location	Call Number	Copy ID	Summary
1 Main Library	General	QL435.A1 C75	1	-

Receiving note  Routing during receiving

Vendor Information

Pricing

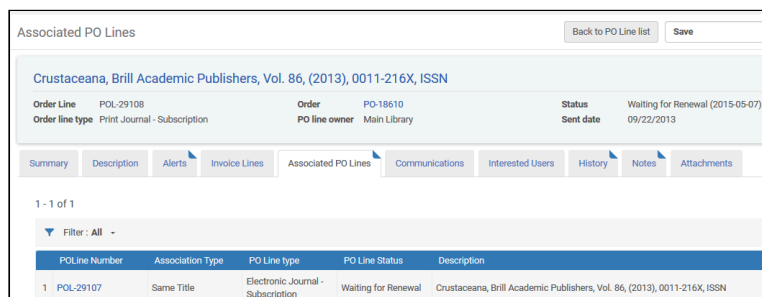
Funding

PO Line Details

Acquisition method: **Technical** Material type: Issue

Invoice status: No invoice Reporting code:

The order for the print version will automatically be populated with details about an “Associated PO Line” (the PO line for the electronic version).



Associated PO Lines

Crustaceana, Brill Academic Publishers, Vol. 86, (2013), 0011-216X, ISSN

Order Line: POL-29108 Order: PO-18610 Status: Waiting for Renewal (2015-05-07)  
Order line type: Print Journal - Subscription PO line owner: Main Library Sent date: 09/22/2013

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History Notes Attachments

1 - 1 of 1

Filter: All

PO Line Number	Association Type	PO Line type	PO Line Status	Description
1 POL-29107	Same Title	Electronic Journal - Subscription	Waiting for Renewal	Crustaceana, Brill Academic Publishers, Vol. 86, (2013), 0011-216X, ISSN

When searching for the order title, both orders will display: the one indicating that it is for an electronic subscription, the other for the print version.

Purchase Order Lines (1 - 2 of 2)   crustaceana	
1	<p><b>Crustaceana, Brill Academic Publishers, Vol. 86, (2013), 0011-216X, ISSN</b></p> <p><b>MMS ID:</b> 99363750000121      <b>Total price:</b> 1154.83 GBP</p> <p><b>Assigned to:</b> -      <b>Funds:</b> Biology E-resources (100.0%) (01/01/2017 - 12/31/2017)</p> <p><b>Type:</b> Electronic Journal - Subscription      <b>Vendor/Account:</b> Gale / Gale - Alma University 0-011-1</p> <p><b>PO line owner:</b> Main Library</p> <p><b>Standard number:</b> 0011-216X</p> <p><b>Order:</b> PO-18609 / (Sent)</p> <p><b>Order Line:</b> POL-29107 / (Waiting for Renewal)</p>
2	<p><b>Crustaceana, Brill Academic Publishers, Vol. 86, (2013), 0011-216X, ISSN</b></p> <p><b>MMS ID:</b> 99363750000121      <b>Copies:</b> Main Library - General (1)</p> <p><b>Assigned to:</b> -      <b>Total price:</b> 0.00 USD</p> <p><b>Type:</b> Print Journal - Subscription      <b>Funds:</b> -</p> <p><b>PO line owner:</b> Main Library      <b>Vendor/Account:</b> Gale / Gale - Alma University 0-011-1</p> <p><b>Standard number:</b> 0011-216X</p> <p><b>Order:</b> PO-18610 / (Sent)</p> <p><b>Order Line:</b> POL-29108 / (Waiting for Renewal)</p>

## How are purchase orders sent to the vendor? Can they be printed and then sent?

Orders can be sent by email or by EDI. The vendor email address can be defined as the library's printer email address and the order owner can then be printed and sent.

## Does Alma create an audit trail on orders?

Alma provides an audit trail in the PO Line. All changes/additions, edits, etc. are automatically tracked (in the History tab of the PO Line). The audit information includes the date and time of the change/update, the old value (where relevant) and the username of the staff user that made the change:

PO Line History					
<a href="#">Summary</a>   <a href="#">Description</a>   <a href="#">Alerts</a>   <a href="#">Invoice Lines</a>   <a href="#">Associated PO Lines</a>   <a href="#">Communications</a>   <a href="#">Interested Users</a>   <a href="#">History</a>   <a href="#">Notes</a>   <a href="#">Attachments</a>					
Filter: All					
Date	Operator	Field Name	Old Value	New Value	
07/24/2015 12:00	System	POLine in claim	false	true	
05/07/2015 19:52	Marliese Thomas	Status	Waiting for Manual Renewal	Waiting for Renewal	
05/07/2015 19:52	Marliese Thomas	POLine in claim	true	false	
05/07/2015 19:52	Marliese Thomas	Renewal date	-	2016-05-01	
03/19/2014 04:00	System	POLine in claim	false	true	
09/22/2013 17:00	Anna Allen	Status	Ready	Waiting for Manual Renewal	
09/22/2013 17:00	Anna Allen	Status	Auto Packaging	Ready	
09/22/2013 17:00	Anna Allen	Po	-	PO-18610	
09/22/2013 10:10	Anna Allen	Item description	Crustaceana, Brill Academic Publishers, Vol. 1, no. 1 (1998-2000)	Crustaceana, Brill Academic Publishers, Vol. 86, (2013), 0011-216X, ISSN	

## Can the cost of an order be split between funds?

A purchase can be split between funds either by percentage or by a specific monetary amount. Below is an example of a line item that is split among four funds.

Funding				
+ Add Fund -				
#	Fund Name ▲	Percent	Amount ▼	
1	Accounting and Finance E-resources (01/01/2017 - 12/31/2017) (29,349.95 USD)	30.0%	300.00	USD
2	Anthropology E-resources (01/01/2017 - 12/31/2017) (24,297.53 USD)	40.0%	400.00	USD
3	Accounting and Finance Monographs (01/01/2017 - 12/31/2017) (13,551.15 USD)	30.0%	300.00	USD
4	T...	100.0%	1,000.00 USD	

## Workflows

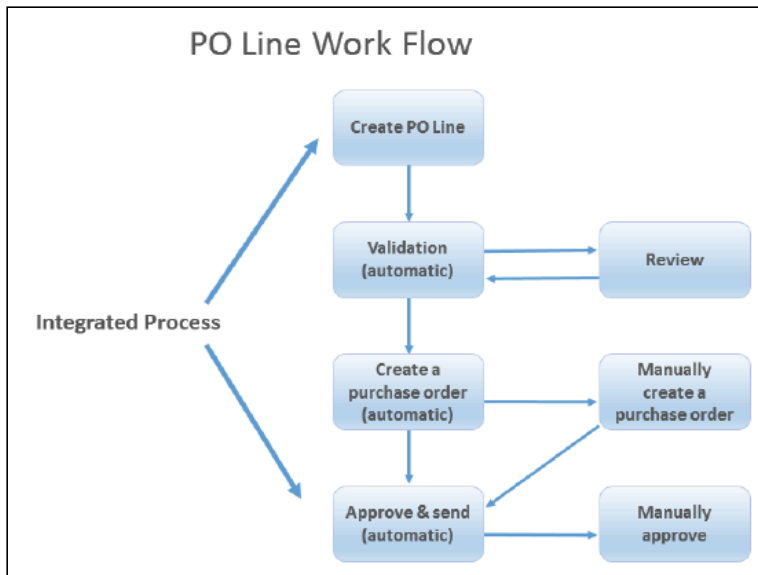
### How does Alma support core acquisitions functionality?

Alma supports end-to-end acquisition processes for all resource types (print, electronic, and digital). The system employs business process automation to streamline and simplify workflows for managing orders, claims, receiving, activation of electronic resources, invoices, vendors and vendor accounts, as well as ledgers and funds. Alma's workflow engine uses library-defined rules to manage most activities automatically and alert staff to exceptional conditions that require manual intervention.

- Most acquisitions activities are unmediated, based on library policies and procedures. Operator intervention is needed only when staff review or mediation is required for the processes to continue.
- Alma holds a single universal currency repository (based on ISO currency codes), which includes current and historical rates. The repository is updated on a continuous basis. To help libraries track and manage currency changes, Alma also provides an exchange rate report, which can be run in real-time to generate a list of recent exchange rates.
- Alma allows staff to create acquisition records for non-purchased materials, such as gifts and depository materials, without requiring that the items follow the traditional workflow of funding, invoicing and payment.

The acquisition module supports real-time fund balances, including a graphical display of the fund balance showing encumbrances and expenditures. Additionally, each fund displays a history of transactions (including positive and negative transactions) and the balance in the fund at the point of each transaction. In addition, Alma Analytics provides advanced reporting functionalities to generate comprehensive reports.

The full purchasing workflow can be summarized in the following diagram:



## Does Alma support automated ordering workflows?

Order workflows in Alma include the automatic processing of purchase orders across electronic and print formats, as well as staff mediation for approval and exceptions, per the library's rules. For example, Alma's workflow engine will be able to automatically assign tasks to staff members, approve orders based on library-defined policies, aggregate purchase order lines into a purchase order, and send the order to a vendor.

In Alma, the order process begins when a purchase order line is created; order lines are the building blocks from which purchase orders are created.

Using business process automation, the vast majority of order lines will be processed automatically, and flow from order line creation directly onto a purchase order. Order lines that require review are flagged and placed on an operator's task list. As an example, the screenshot below shows an acquisition staff member's "task list" for purchase order lines in review.

Purchase Order Lines in Review (1 - 7 of 7)			
Assigned to Me			
Unassigned			
Assigned to Others			
1	<b>A thousand days : John F. Kennedy in the White House / (By) Arthur M. Schlesinger, Jr., Boston ; Houghton Mifflin, 1965., 6</b>	Copies: Main Library - General (1), Music Library - Musical Collection (1) Type: Print Book - One Time Total price: 49.95 USD Funds: Accounting and Finance E-resources (100.0%) (01/01/2017 - 12/31/2017) Standard number: 65020218 Order: - Order Line: POL-13115 / (In Review)	Vendor reference ID: - Expected delivery: - Receiving note: Mandatory information is missing or erroneous, Reporting code is missing
2	<b>After deck, Sobraon [picture], Graham, H. J. (Harold John), 1858-1929., National Library of Australia</b>	Copies: Main Library - General (1) Type: Visual Material Total price: 0.00 USD Funds: - Standard number: - Order: - Order Line: POL-13607 / (In Review)	Vendor reference ID: - Expected delivery: 12/01/1969 Receiving note: Mandatory information is missing or erroneous, Reporting code is missing, The bib record is part of a series/book set
3	<b>Crazy from the heat : A chronicle of twenty years in the Big Bend / James H. Evans ; foreword by Rebecca Solnit., Austin ; U</b>	Copies: - Type: - Total price: - Funds: - Standard number: - Order: - Order Line: -	Vendor reference ID: - Expected delivery: - Receiving note: -

Order lines may be sent for review for various reasons - that the purchase order line is missing mandatory information such as a fund, price, or location, or that a library-defined price limit has been reached.

Purchase Orders show an auto generated alert that explicitly states what is wrong or missing with that order. For example:

A thousand days : John F. Kennedy in the White House / [by] A

Order Line POL-13115 Order -  
 Order line type Print Book - One Time PO line owner Main

Summary Description Alerts Invoice Lines Associated PO Lines

1 - 2 of 2

Type	Description
1	Mandatory Information is Missing or Erroneous
2	Reporting code is missing.

Once an operator has reviewed and updated the order lines as necessary, they move automatically to the next stage, where purchase orders are generated and sent to the vendors. In cases where an order does not need to be sent (e.g., Approval Plans), the purchase order process ends when the order is created in Alma.

The purchase order is linked directly to the metadata records in the system; there is no need for duplicate records in Alma. Order lines are linked directly to bibliographic records, or to package records in the case of groups of e-resources. Item records, which describe the resources in the library's inventory, are linked to the metadata record, which is in turn linked to the purchase order line.

When initiating an order, Alma will offer the staff user the option of choosing a Purchase Type – based on the type of media being ordered. (The list can be customized by the library.)

Based on this information, the PO Line that will be created will be tailored to the type of material being order. For example a monograph fill have fields for defining library and location; journals (print and electronic) will have subscription date fields.

A purchase order for physical material – where item information can be registered:

Library	Location	Barcode	Receiving Date	Item Policy
1 Music Library	Musical Collection	AU87116	-	-

A purchase order for electronic material – where license information can be registered:

Name	Type	Activation Status	Activation Date	Additional PO Line
1 Gale Cengage Listener Historical Archive	Selective package	Not active	-	-

A purchase order for continuing resources – where subscription information can be registered:

Manual renewal <input checked="" type="checkbox"/>	Subscription to date <input type="text"/>
Subscription from date <input type="text"/>	Renewal reminder period (days) <input type="text" value="0"/>
Renewal date <input type="text"/>	

## Does Alma support a variety of acquisition workflows?

Alma supports purchasing workflows of all types.

- Approval orders are managed as standing orders, where the specific titles are loaded via MARC embedded order data/

embedded order confirmation records. The system will check for approval titles that are already owned and flag them for staff review.

- Firm orders for print or electronic resources are managed by creating order lines attached to either a brief bibliographic record or a complete record from the Alma Community Catalog. Once the order has been processed, it may be sent via EDI, email, or print. The library may attach complete bibliographic records either from the Community Catalog or an external source. Print titles await receiving from the vendor, and electronic titles are activated as per agreement with the vendor. At that point, these resources are added to the permanent collection.
- Print continuations (print subscriptions and standing orders) and electronic subscriptions are both managed by Alma through ongoing open orders. The library establishes a purchase for the subscription, including a start and end date (the latter is optional). As new issues of print resources are received, inventory is created automatically. Electronic subscriptions may be activated and are subject to evaluation and renewal workflows.
- Alma also supports acquisition workflows for non-purchased materials, such as gifts, and legal deposit, without requiring that the items follow the traditional workflow of order, receipt, invoice, payment.
- Alma supports the ability to derive purchase orders based on EOD/EOCR records. The approach is flexible enough to accommodate mapping PO data from an array of different MARC fields and subfields, and can be customized based on different vendor requirements. Default profiles are included for common vendor mappings. The following screen capture shows an example of mapping inventory information from the vendor record to Alma item records:

Physical Mapping

Mapping Policy:  Basic  Advanced

Material type: Book

Library field: 949

Location field: 949

Default library: Main Library

Map library/location:

Number of items field: 949

Default number: 1

Barcode field:

Item policy field:

subfield 6:

subfield t:

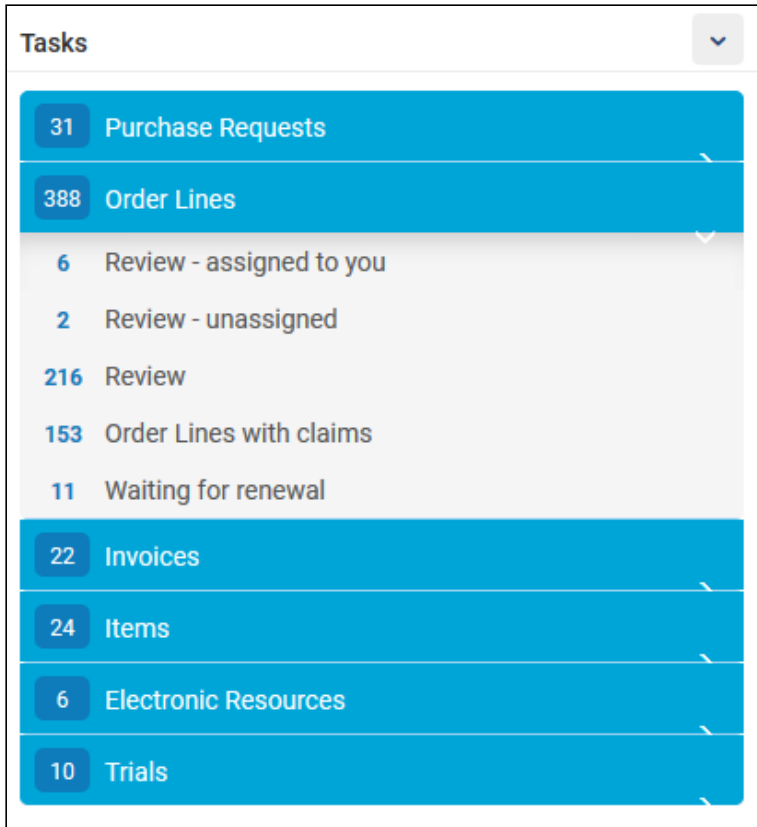
Default location: General

subfield o:

subfield ' :

- Alma maintains a lifecycle of purchasing that allows orders to be processed automatically with no staff intervention. The library can set up rules that will flag an order for review or for automatic processing based on flags, e.g.:
  - By vendor (so that some vendor orders can pass through automatically)
  - By acquisition method (e.g., so that approval orders will pass fewer checks)
  - By type of material or source of PO information
  - By additional exceptions (duplicate active order, item already exists in inventory, price exceeds limits, fund nearing limit, etc.)

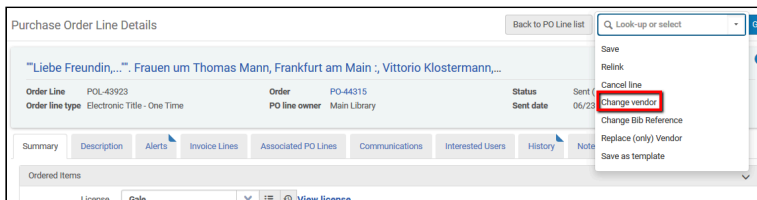
In this way, acquisitions staff will have one task list in which to review orders that require decisions, while other orders will be automated. The following screen capture shows an example of a staff user's task list – with a hypertext link to order lines that require review:



## Relinking

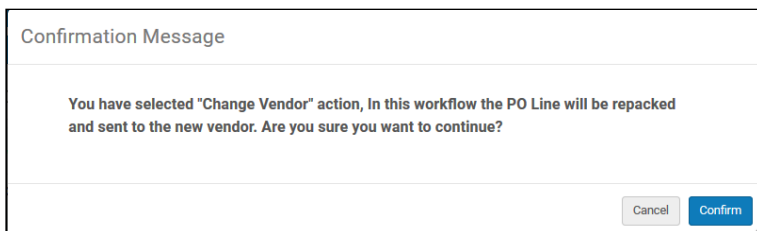
### Is it possible to change the vendor after an order has been sent?

It is possible to change the vendor in an order after it was sent to the vendor:

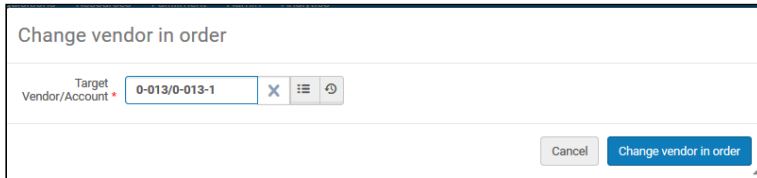


- The 'Change Vendor' option will change the vendor in the order line and resend the order to the new vendor (as described below).
- The 'Replace (only) Vendor' option will change the vendor in the order record, but will not resend the order.

For the 'Change Vendor' option, a confirmation dialog box appears. The message in this box states that the PO line will be sent again.



After clicking Confirm, The Change Vendor in Order dialog box displays:



Once the vendor has been changed, the order will be resent.

---

## Can PO Lines be relinked?

A staff user can change the bibliographic record to which a PO line is linked. Possible reasons for doing this include:

- An EOD arrives for a single volume within a multi-volume work which is more suitable to link to than the existing link.
- An item arrives that matches an existing bibliographic record more suitably than a new one imported at the time of the order.

The Relink option is available only for PO lines with the status **In Review**, **Deferred**, **Ready** (packed into a PO and ready to be sent), or **Waiting for Manual Renewal**, as well as for one-time closed PO lines. PO lines cannot be relinked if any of the following is true:

- The PO line is related to the Central KnowledgeBase. When this occurs, the **Relink** option does not appear.
- The PO line contains items belonging to two different bibliographic records.

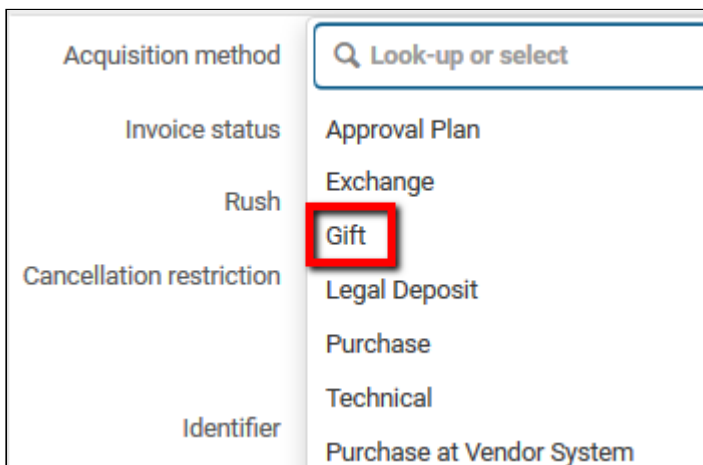
---

## Donations, exchange, legal deposit

---

### How are donations handled?

Alma allows staff to create acquisition records for non-purchased materials, such as gifts and depository materials, without requiring that the items follow the traditional workflow of order, receipt, invoice, payment. If an acquisition process is not necessary for non-purchased materials, Alma also allows the operator to skip the acquisitions workflow entirely and simply create descriptive and inventory records that are necessary to properly manage the resource.



---

## Can Alma handle exchange orders?

Alma supports orders of type exchange. A typical workflow would be as follows:

Exchange partners are defined in Alma as vendors:

175	✔	ALKMAAR	STEDELIJK MUSEUM ALKMAAR
176	✔	ALKMAAR2	GEMEENTE ARCHIEF ALKMAAR
177	✔	ALLEN	ALLEN MEMORIAL ART MUSEUM

'Institution A' places an order for an item (e.g. a museum catalog) with the exchange partner ('institution B') listed as the vendor.

The purchase type 'exchange' is chosen. With this order type, the price and fund fields are not mandatory. A reporting code could also be registered.

PO Line Details

Acquisition method: Exchange  
Material type: JOURNAL  
Invoice status: No invoice  
Reporting code: Manuscripts + Archives Collections  
Rush:   
Manual packaging:

When the item arrives, receive it like all other orders. After receiving, the order is closed and process is complete.

In Alma Analytics, a report of all exchange items can be generated by filtering on the acquisitions method and choosing the exchange parameter:

New Filter

Column: Acquisition Method

Operator: is equal to / is in

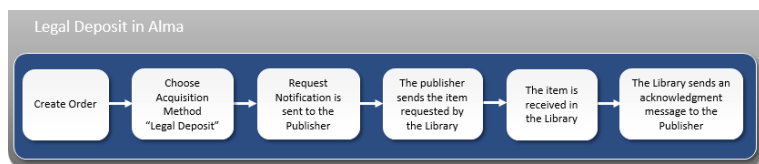
Value: [List of acquisition methods: APPROVAL, DEPOSITORY, EXCHANGE (checked), GIFT, PURCHASE, TECHNICAL, VENDOR\_SYSTEM]

Buttons: Help, OK, Cancel

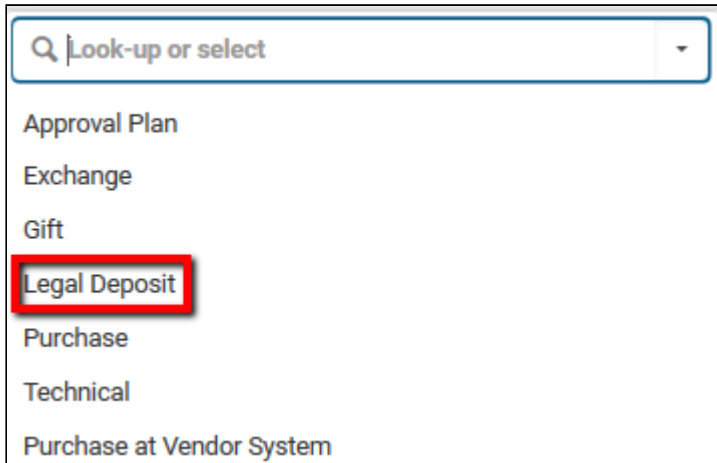
---

## Does Alma support a legal deposit workflow?

The full Legal Deposit workflow in Alma consists of 6 simple steps:

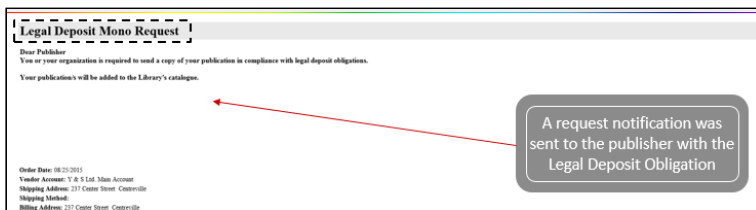


When the order for the item is created, the acquisition method 'Legal Deposit' is chosen. This acquisition method does not require that the price and fund fields be populated:



A screenshot of a dropdown menu for selecting an acquisition method. The menu is titled "Look-up or select" and contains the following options: Approval Plan, Exchange, Gift, Legal Deposit (highlighted with a red box), Purchase, Technical, and Purchase at Vendor System.

After saving the order, a legal deposit request letter is generated, and sent to the publisher:



A screenshot of a "Legal Deposit Mono Request" letter template. The letter is addressed to a publisher and includes a callout box that reads: "A request notification was sent to the publisher with the Legal Deposit Obligation". The letter text includes: "Dear Publisher", "You or your organization is required to send a copy of your publication in compliance with legal deposit obligations.", and "Your publication's will be added to the Library's catalogue." At the bottom, there is a table with columns for Order Date, Vendor Account, Shipping Address, Shipping Method, and Billing Address.

Once the item has been received, a letter of acknowledgement can be sent back to the publisher.

Alma Analytics allows for generating reports filtered by acquisition method.

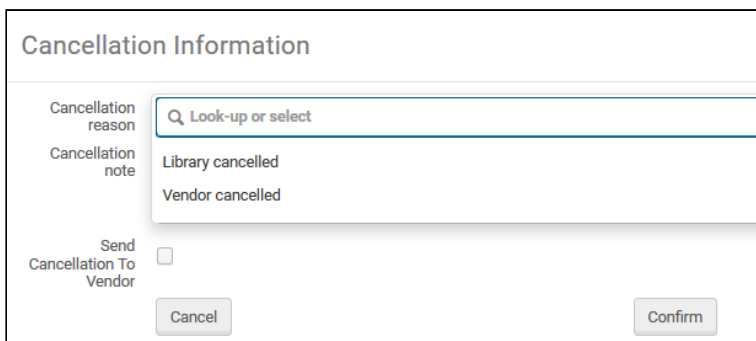
---

## Cancelations, Deletions

---

### How does Alma handle cancelations?

Orders can be claimed or canceled. When for example, cancelling an order, the staff operator is prompted to enter a reason for the cancellation – this can be from a pull down list of library defined reasons. An optional, additional note can be added to this.



A screenshot of the "Cancellation Information" form. It includes a "Cancellation reason" dropdown menu with a search bar "Look-up or select" and a list of options: "Library cancelled" and "Vendor cancelled". There is also a "Cancellation note" field, a "Send Cancellation To Vendor" checkbox, and "Cancel" and "Confirm" buttons.

---

### Can purchase orders be deleted?

Deleting a PO line removes it from the Alma system and also deletes any transactions and inventory resources associated

with the PO line. The delete option is available for PO lines with the following statuses:

- In Review
- Packaging (Automatic or Manual)
- Deferred
- Cancelled

A PO line cannot be deleted if:

- It is linked to an invoice line.
- It is attached to a PO and has been sent to a vendor (if the PO has not been sent, the PO line can be removed from the PO and then deleted).
- One of the PO line resources has been received or activated (even if the PO line is in review)

It is possible to delete an entire purchase order (by staff with the relevant role) if it does not have any PO lines that are received, activated, or linked to an invoice.

---

## When purchase orders are closed will linked interested users be deleted?

You can control deletion for interested users in all closed and canceled PO lines.

Set the **po\_line\_remove\_interested\_users** to **true** to allow the entries to be deleted. A system job, PO Line - Delete interested users, runs weekly to delete users that are linked to closed or canceled PO lines.

---

## Authorizations

---

### Can Alma set distinct levels of authorization for ordering workflows?

Alma's workflow engine uses library-defined rules to manage most activities automatically, and alert staff to exceptional conditions that require manual intervention. Most acquisitions activities are unmediated, based on library policies and procedures. Intervention is needed only when staff review or mediation is required for the processes to continue. Order lines that require review are flagged and placed on an operator's task list.

Role and privilege granularity reflects the common breakdown of responsibilities and authorizations within the library/institution, with sensitive actions being controlled by specific roles and privileges. For example:

A Purchasing Operator role can do all of the actions required for processing a purchase request, such as:

- Manually create a new order
- Review and update an order
- Send the order to the vendor

However, the Purchasing Operator cannot:

- Approve orders that have been identified by the system as requiring special approval, as per institutional criteria
- Delete an order. Being allowed to perform this action would require an additional extended role

An Invoice Operator can do all of the actions that are required for processing invoices; however, the Invoice Operator

cannot:

- Approve invoices
- Delete Invoices

Vendor information may be made viewable by roles that require access to this information, such as:

- Purchasing Operators
- Invoice Operators

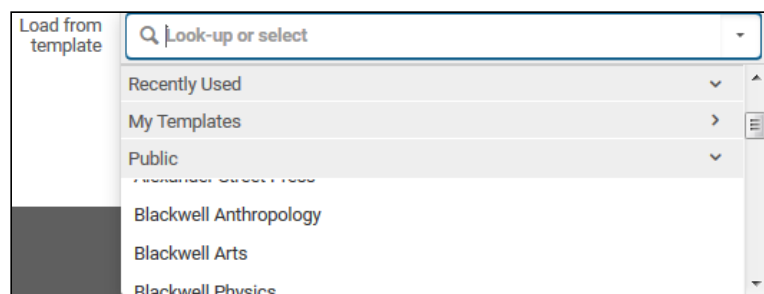
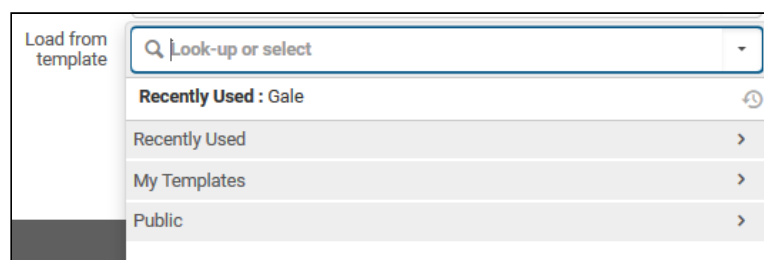
---

## Templates

---

### Can a variety of order templates be created/used?

Alma supports the creation of purchase order templates. The use of template decreases the need to re-enter purchase related information when creating a purchase order. Templates can be saved either public or for private use. When loading templates, the staff user can choose from private templates and public templates.



---

### Can templates be modified?

Templates can be modified by editing and resaving the template. The workflow is as follows:

- Open a purchase order using the template that you wish to modify
- Make the relevant changes on the order, and then choose the option 'Save as template'

A dropdown menu with a search bar at the top containing the text "Look-up or select". Below the search bar are several menu items: "Save and continue", "Save", "Order Now", "Defer", "Relink", "Cancel line", "Delete", "Change Bib Reference", and "Save as template". The "Save as template" item is highlighted with a red rectangular border.

The "Save as template" dialog box contains the following elements:
 

- A "Template Name" input field with the text "My Nat. Booksellers".
- An "Existing Templates" dropdown menu with "My Nat. Booksellers" selected.
- A "Public template?" section with two radio buttons: "Yes" (unselected) and "No" (selected).
- A "Delete" button.

- Confirm that you wish to replace the 'old' template with the new version.

---

## Integration

---

### Can Alma integrate with vendor websites by the use of APIs?

Alma provides extensive open interfaces, and all APIs are accessible freely through the Ex Libris Developer Network.

The Alma web services are managed via the [Developers Network](#) as well. This platform serves as the main vehicle over which the system's openness philosophy is realized.

Alma provides a comprehensive set of RESTful APIs, which are also available on the Ex Libris Developer Network.

Alma integrates with external systems, such as vendor systems, Enterprise Resource Planning (ERP) systems, metadata management systems, and remote storage systems, via standard protocols, such as S/FTP. It is organized according to the external systems. Ex Libris was the first vendor to introduce a real time acquisition integration with vendors using APIs and we are working with various vendors in order to provide enhanced integration between Alma and the Vendor systems and support seamless workflows for increased efficiency for staff related processes.

---

### Can orders be generated at a vendor's website and linked to Alma?

Alma integrates with commonly used external selection portals such as YBP's GOBI platform (<https://developers.exlibrisgroup.com/blog/Real-time-Acquisitions>) with automated import capabilities through extensive support for vendor-specific import profiles and embedded order data (EOD) records.

## Is real time acquisitions with vendors supported?

Alma supports with Library Service Providers to streamline acquisitions workflows. It incorporates standard ordering and loading technologies with APIs to speed the availability of resources, increase the efficiency of integrating records, and enhance data enrichment.

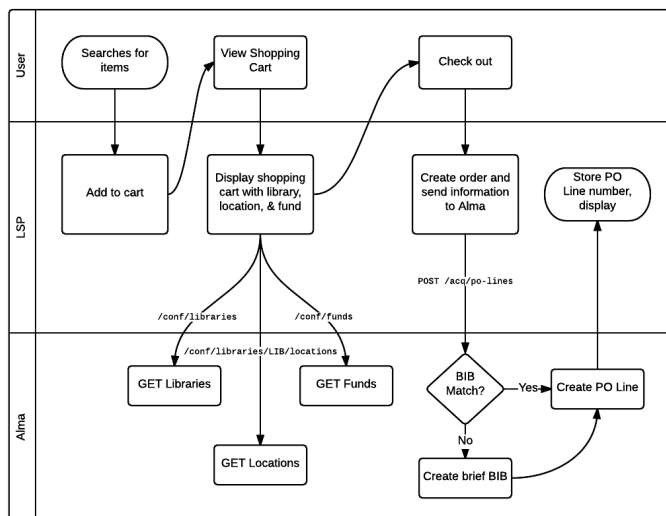
### Workflow

- The user searches for items in the vendor's system, and places them in the shopping cart (or equivalent).
- The user verifies owning library, fund codes and other relevant information.
- At checkout, the vendor sends the shopping cart data to Alma using the Create PO line API.
- Alma validates the received PO line information
- Alma attempts to match the bibliographic data using standard identifiers. If no match is found, Alma creates a brief bibliographic record for the order.
- Alma responds with the newly created PO line number to the vendor.
- The PO line is processed in Alma as other PO lines are processed. If an order requires manual review, Alma sends it to the *In Review* task list.

The **vendor reference number** is kept as part of the Alma PO line. **Alma PO line number** is kept as part of the vendor order details.

The following flow chart represents the workflow:

Real Time Acquisitions Integration  
Alma & Library Service Providers (LSP's)



The following vendors currently support this integration:

- GOBI
- Harrassowitz
- OASIS

---

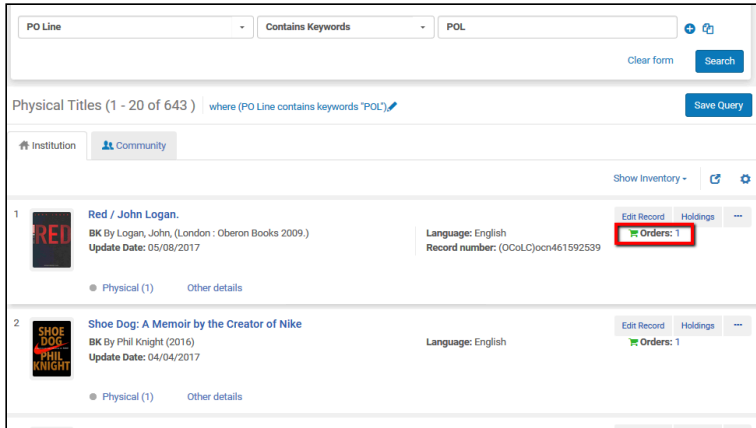
## Search

---

### Can searches for bibliographic records be limited to those with purchase orders attached?

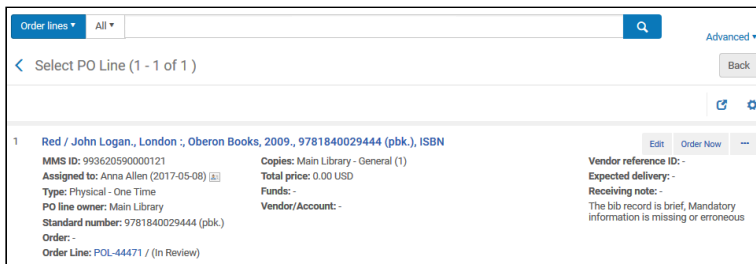
This is possible via the Advanced Search. Users can simply use the wildcard \* to search any resource with PO Lines attached.

Step 1: Advanced Search:



The screenshot shows the Alma Advanced Search interface. At the top, there is a search bar with 'POLL' entered. Below the search bar, it displays 'Physical Titles (1 - 20 of 643)'. The search results are listed in a table-like format. The first result is 'Red / John Logan.' with a book cover image. The second result is 'Shoe Dog: A Memoir by the Creator of Nike' with a book cover image. Both results show 'Orders: 1' in a red box, indicating that purchase orders are attached to these records.

Clicking on the Orders link will open summary details of the order:



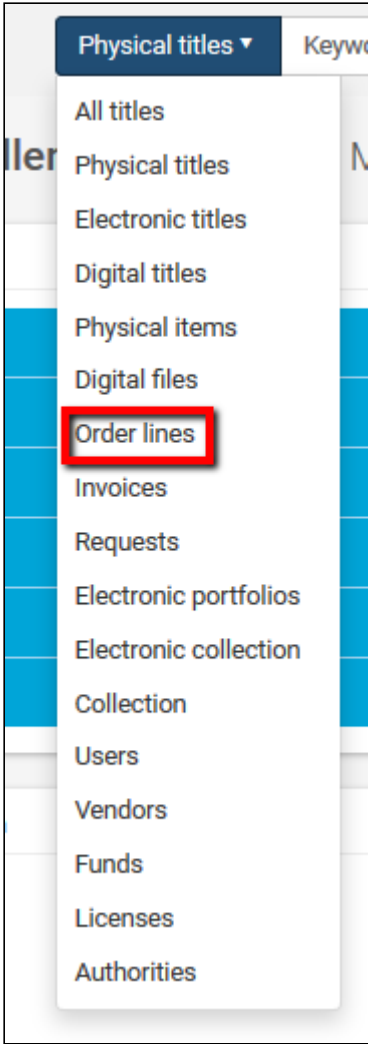
The screenshot shows the Alma Order Summary details page. It displays the following information:

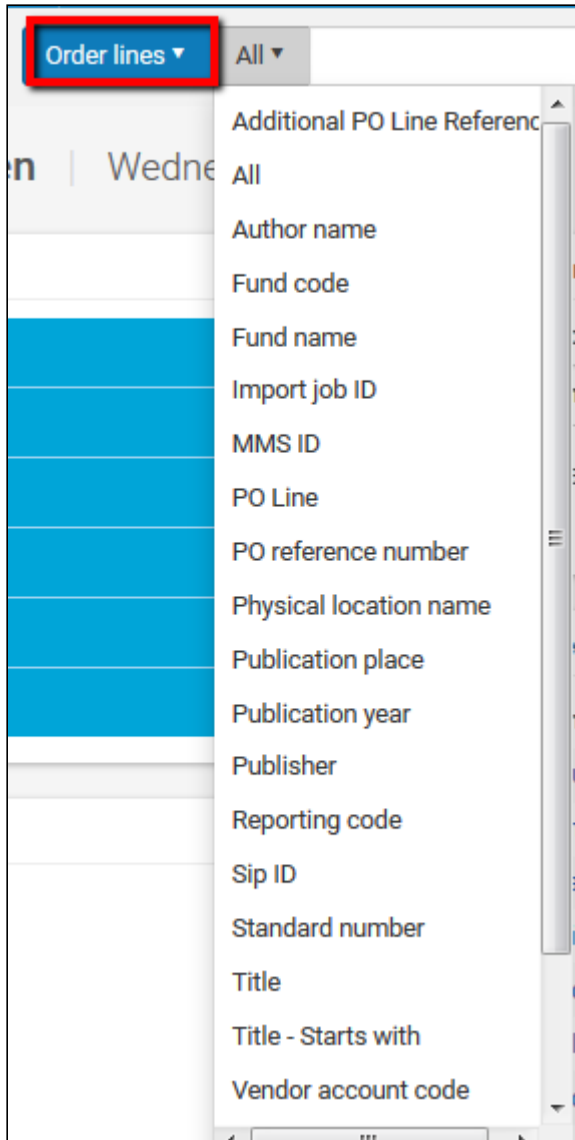
- Order lines: All
- Select PO Line (1 - 1 of 1)
- 1 Red / John Logan., London ; Oberon Books, 2009., 9781840029444 (pbk.), ISBN
- MMS ID: 993620590000121
- Assigned to: Anna Allen (2017-05-08)
- Type: Physical - One Time
- PO line owner: Main Library
- Standard number: 9781840029444 (pbk.)
- Order: -
- Order Line: POL-44471 / (In Review)
- Copies: Main Library - General (1)
- Total price: 0.00 USD
- Funds: -
- Vendor/Account: -
- Vendor reference ID: -
- Expected delivery: -
- Receiving note: -
- The bib record is brief. Mandatory information is missing or erroneous

---

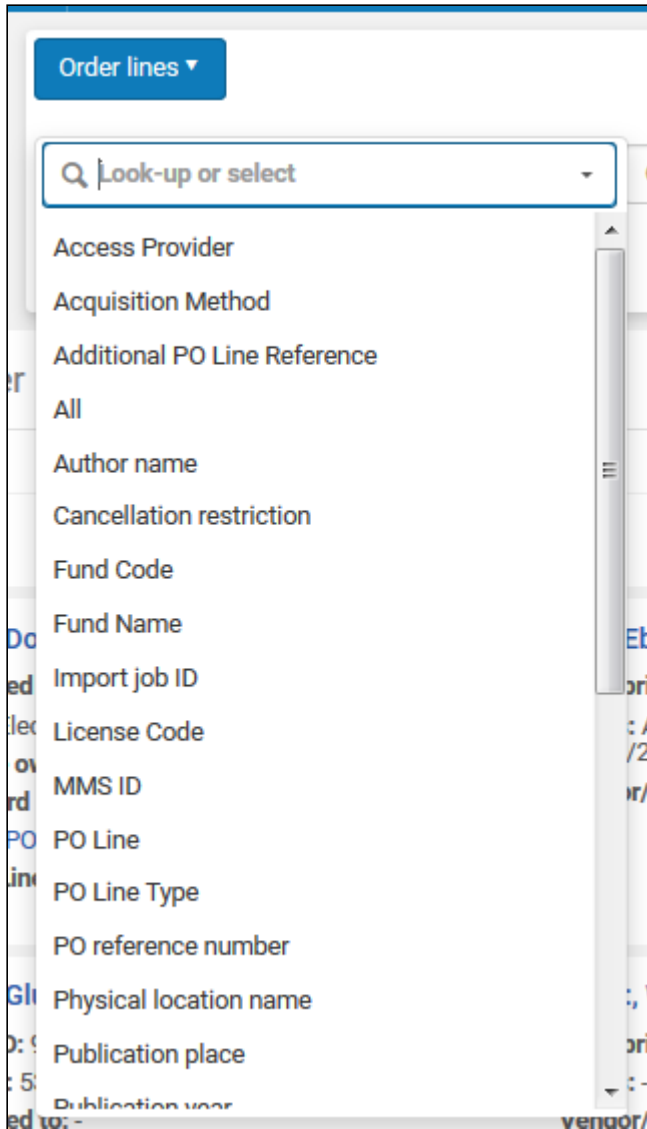
### Does Alma provide the ability to search all fields within all acquisitions records?

Alma supports searching for purchase order lines from the standard repository search option - with indexed search options related to order lines:





It is possible to search by a variety of search indexes related to purchase order details, fund information and associated bibliographic information. The search results can be further limited by facets such as Status, Library, Purchase Order Type, Alerts, Acquisition Method, and Vendor. Alma also provides Advanced search capabilities for searching for PO Lines based on complex criteria as illustrated below:



Search results can be saved as a set for PO Line batch processing such as changing vendor information, closing PO Lines and other acquisition tasks.

PO Lines can be searched by fields such as all, title, author, publisher, publication year, publication place, standard number, physical location name, vendor code, vendor name, vendor account code, fund code, fund name, PO line, additional PO line reference, PO reference number, vendor invoice number.

Total views:

21461