

# Presentations and Documents - Acquisitions

[Home](#)

Jump to [Integration with Financial System](#)

## Acquisitions - COUNTER and SUSHI

- [What is COUNTER and what is SUSHI.pptx](#)
- [How to create and test a COUNTER Release 5 SUSHI Account.pptx](#)
- [How to schedule and monitor COUNTER SUSHI harvesting.pptx](#)
- [Acquisitions - Managing COUNTER compliant SUSHI data On Line Help](#)

## Acquisitions - Invoicing

- [How to add a VAT \(value added tax\) percent to invoices and invoice lines.pptx](#)
- [Invoicing – How to pay Use Tax \(Reporting Tax\) to a governmental vendor when paying invoice.pptx](#)
- [Invoicing - How to install and use the Invoice Line Tax Calculator cloud app](#)

## Acquisitions - Infrastructure

- [Acquisitions infrastructure - Vendors.pptx](#)
- [Acquisitions infrastructure - Funds and Ledgers.pptx](#)
- [Acquisitions infrastructure - Licenses and Amendments.pptx](#)

## Acquisitions - General

- [How to batch create POLs for portfolios in an electronic collection using an import profile.pptx](#)
- [eod\\_two\\_records.xml](#)
- [How to order and receive and invoice a physical item from copy cataloging.pptx](#)
- [How to use acquisitions units to acquire for and receive for specific libraries.pptx](#)
- [How to create an invoice to enter a credit or an additional charge for a closed or open order.pptx](#)
- [How to unreceive an item received from a POL.pptx](#)
- [How to receive multiple PO Lines in batch.pptx](#)
- [How to use an acquisitions work order when receiving an ordered item.pptx](#)
- [How to resend an order to the vendor.pptx](#)
- [How to move newly arrived items to a temporary location New Books Display.pptx](#)
- [How to get a list of all Alma vendors without linked orders.docx](#)
- [Fiscal Period Closure.pptx](#)

- [The New Unified PO Line Task List.pptx](#)
- [Acquisitions - Hyperlink invoice number in POL to invoice \(NERS 7049\).pptx](#)
- [Accrual Accounting in Alma](#)
- [How to order a second copy of an e-book \(suggested method\)](#)
- [Ability to add or replace funds for multiple invoice lines \(Igelu 2019\)](#)
- [Link to items from Claims Task List \(Igelu 2019\)](#)
- [PO Line number and title Included in subject of claim letter \(Igelu 2019\)](#)
- [Evaluations and Trials and Alma](#)
- [Adding a controlled vocabulary for local license terms](#)
- [Creating multiple invoices with multiple invoice lines via an Excel file](#)
- [Explanation of the Change Bibliographic Reference link for POLs](#)
- [Explanation of the Relink POL option](#)
- [How to configure a PO Line Cancellation Reason and report on it in Alma Analytics](#)
- [How to handle one order to a vendor for both physical and electronic material and link them together](#)
- [Standing Orders in Alma](#)
- [The POL Interested User and Hold Item functionality](#)
- [The shelf-ready process](#)
- [Licenses and e-resources in the consortial environment](#)
- [Importing ONIX-PL Licenses](#)
- [Sample ONIX-PL License](#)
- [Technicalities Vol 41 Num 2 Mar Apr 2021 see page 17.pdf](#) (see page 17 for the article "Changing Priorities: Trends in Physical and Electronic Resource Usage in U.S. Academic Libraries")
- [Technicalities Vol 41 Num 2 Mar Apr 2021 page 17 to 20.pdf](#)
- [Traditional Chinese Version of article "Changing Priorities: Trends in Physical and Electronic Resource Usage in U.S. Academic Libraries"](#)

### **Purchase Requests**

- [How to determine the value of LDR pos. 17 when a brief record is created from a purchase request.docx](#)
- [Acquisitions - Purchase Requests in Alma.pptx](#)
- [Acquisitions - Purchase Requests Specific Functionalities.pptx](#)

### **DDA**

- [Acquisitions - Patron Driven Acquisitions \(PDA\) Demand Driven Acquisitions \(DDA\).pptx](#)
- [Acquisitions - Print DDA.pptx](#)

### **Acquisitions - RTO Real Time Ordering**

- [Acquisitions - Alma Check Availability and Pricing with OASIS.pptx](#)
- [Acquisitions - Alma Real-Time Ordering \(RTO\) integration with OASIS platform.pptx](#)
- [Acquisitions - Ordering an eBook from OASIS using the Real Time Ordering \(RTO\).docx](#)

## Acquisitions - EDI

- [Acquisitions - How to add a vendor account in the invoice created from an EDI file.docx](#)
- [Acquisitions - How to make the Use pro rata always be unchecked for invoices created via EDI.docx](#)
- [ProQuest Ebook Central and Alma - EDI and EOD workflow](#)

## Acquisitions - Integration with financial system

See also [Sample Integration Files](#)

- [Acquisitions - Integrating Alma with a financial system to export import and pay invoices.pptx](#)
- [Acquisitions - Integrating Purchase Orders with the ERP number for approval.docx](#)
- [Acquisitions - How to change invoices to status Sent to ERP without using the Export to ERP job.docx](#)
- Exported invoice: [8309358310000121-1764762880459.xml](#)
- Imported invoice approval: [8309358310000121-1764762880459-import-approval.xml](#)
- [How to Synchronize Fund Information from a Financial System to Alma Using an Excel Spreadsheet via the Funds Allocation Loader.docx](#)
- [Acquisitions - Fund Allocation Loader.xlsx](#)
- Two invoices exported and the same two invoices imported for payment, one with APPROVED and one with REJECTED:
  - [Two Invoices - Export XML.xml](#)
  - [Two Invoices - Payment XML.xml](#)

## Acquisitions - The account discount percent for manual and API POL creation

- [Acquisitions - The account discount percent for manual and API POL creation.docx](#)
- [Acquisitions - 1 PO Line with correlation between the price and discount with the fund\\_distribution.xml](#)
- [Acquisitions - 2 PO Line with a 10 percent discount and no amount in the fund\\_distribution.xml](#)
- [Acquisitions - 3 PO Line with no correlation between the price and discount with the fund\\_distribution.xml](#)
- [Acquisitions - Sample New POL xml file.xml](#)
- [Acquisitions - Sample New POL xml file explanation.txt](#)

## Acquisitions - Scenarios for acquisitions in consortia

- [Acquisitions - Scenarios for acquisitions in consortia - High Level Explanation.pptx](#)
- [Acquisitions - Scenario 1 - Acquisitions of E-Resources done entirely in the network zone.pptx](#)
- [Acquisitions - Scenario 2 - Negotiation type license in network zone and POLs in member institutions.pptx](#)
- [Acquisitions - Scenario 3 - Shared licenses from network zone and POLs in member institutions.pptx](#)
- [Creating an acquisitions POL for Network Zone Consortia.pptx](#)

[Back to top](#)