Activation and Invoicing Workflows for Electronic Resources

Ex Libris Professional Services

Contents

Glossary of Invoicing Terms for Electronic Resources

PO (Purchase Order): One or more PO lines sent to or associated with a single vendor; otherwise known as an order. To create invoices, a PO must exist.

Activation: The process of enabling access to e-resources for patrons. Includes confirming that the library does have access to the resource along with setting up technical information to provide access to patrons.

Invoice: Payment recognition for items activated. Invoices are created in Alma to complete purchase transactions as well as update ledgers and funds.

ERP (Enterprise Resource Planning): Integrated management of core business processes at your institution. Often known as *University* or *College Finance*.

EDI (Electronic Data Interchange): A method through which business information is interchanged electronically using a standardized format. Alma uses EDI to import invoices electronically based on vendor data.

VAT (Value Added Tax): A consumption tax placed on products whenever value is added during production or distribution. This option applies in some countries around the world.

Activate a One-Time Electronic Title

Goals of this exercise:

- Activating a one-time electronic title
- Editing the portfolio
- Testing and confirming access

! ● **Note: An operator with the Electronic Inventory role assigned is required to perform activation tasks.**

! ● **Note: Electronic resources awaiting activation go to the *Unassigned* tab initially. Once starting to work with an electronic resource, that resource is automatically assigned to that operator.**

! ● **Note: To view electronic resources to which different statuses are assigned, click on the filter for *Status* that you will find at the middle left and make a selection.**

1. Open the Resources menu and select *Manage Electronic Resource Activation* under the **Manage Inventory** submenu. On the **Unassigned** tab, identify the title you will activate, for example, *Climate-wise landscaping*, with the *PO Line 7932*.

2. From the *More actions* menu, choose **Activate** and **Confirm** that you want to continue (or **Cancel** if you do not want to proceed). The electronic resource is now activated and available for editing. **Confirm** that you want to continue (or **Cancel** if you do not want to proceed).

5. Review the information on the **General** tab. You should see that *Portfolio availability* is **Available**. From the drop-down box for *Electronic material type*, select **Book**. Confirm the *Interface name* and *Library*.

6. Review the information on the **Linking** tab. If the *URL type* is **Static URL**, confirm that the *Static URL* is correct. If the *URL type* is **Dynamic URL**, confirm that it is correct by clicking on the **Test dynamic URL syntax** button. Change *Proxy enabled* – **No** to **Yes**, as appropriate, and select the *Proxy*.

7. Click on the **Test access** button to be taken to the *Online Services* window and click on the link associated with the *Full text available at* statement to confirm that you do, indeed, have access.

8. When you have confirmed access and finished all other updates for this resource, click on the **Save** button to complete the activation task for this portfolio.

9. One final step is to change the status of this activation to **Done**. Doing so indicates to other Electronic Resources operators that the activation work for this portfolio has been completed. Click on the *More actions* menu and select the **Done** option.

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Create an Invoice for a Single Activated One-Time Electronic Title

Goals of this exercise:

- Create an invoice from a PO for a single activated one-time electronic title

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! • **Note: An individual with the Invoice Operator role is required to create invoices.**

! • **Note: There are three options that may be used to create invoices:**

    a. **Manually**
    b. **From PO**
    c. **From File (load invoices in batch)**

! • **Note: Depending on practices at your institution, Alma may be configured to require that invoices need to be approved by an operator with the Invoice Manager role.**

1. Open the Acquisitions menu and select *Create Invoice* under the **Receiving and Invoicing** submenu.

2. Choose to create an invoice **From PO**. (The screen will refresh before you are able to click on the **Next** button.)

3. Enter the PO number or search for the PO by clicking on *Select from a list*. When the PO is found, you will be able to confirm that the details match, especially as regards the vendor.

4. Click on the **Save** button to create the invoice. You will be taken to the *Invoice Lines* tab.

5. Review the details for the invoice line. Is the price estimated at the time of ordering still correct? Is the fund assigned to the invoice line correct? If so, go to the *Summary* tab.

6. Review the details on the *Summary* tab. If desired, modify the *Invoice number* and *Invoice date*. Confirm the *Vendor* and *Vendor account* information. Ensure that the *Total invoice lines amount* (calculated from the *Invoice Lines* tab) and the *Total Amount* are equal.

7. Click on the **Save and Continue** button, in the upper right corner, to complete this invoice.

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Activate an Electronic Portfolio Subscription

Goals of this exercise:

- Activate an electronic portfolio subscription
- Editing the portfolio
- Testing and confirming access

❗● Note: An operator with the Electronic Inventory role assigned is required to perform activation tasks.

❗● Note: Electronic resources awaiting activation may also be found on the task list when this widget is active on an Electronic Inventory operator's Alma home page.

1. Open the Resources menu and select *Manage Electronic Resource Activation* under the **Manage Inventory** submenu. On the **Unassigned** tab, identify the title you will activate, for example, *Journal of management*, with the *PO Line 7951*.

2. From the *More actions* menu, choose **Activate** and **Confirm** that you want to continue (or **Cancel** if you do not want to proceed). The electronic portfolio is now activated and available for editing. **Confirm** that you want to continue (or **Cancel** if you do not want to proceed).

3. Review the information on the **General** tab. You should see that *Portfolio availability* is **Available**. From the drop-down box for *Electronic material type*, select **Journal**. Confirm the *Activation date* and *Library*.

4. Review the information on the **Linking** tab. In this example, we are able see *Service parser parameters* associated with this resource. **Confirm** that the parser parameters are as expected. Change *Proxy enabled* – **No** to **Yes**, as appropriate, and select the *Proxy*.

5. Click on the **Test access** button to be taken to the *Online Services* window and click on the link associated with the *Full text available at* statement to confirm that you do, indeed, have access.

6. On the **Coverage** tab, determine *Which coverage statement will be applied* in connection with the subscription you have purchased from and licensed with the vendor. Based on what you select, make other changes as necessary.

7. Go to the **Acquisition** tab confirm the *PO Line*. If you know that the license is now ready to be associated with this portfolio, you can add it by clicking on the **Select from a list** button. If this portfolio should be included as part of a *Patron Driven Acquisitions* profile you may make that association now.

8. On the **Notes** tab, you may include information related to authentication, public display and an internal description.

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	9. Review the **History** tab to confirm the actions that have occurred with regard to this electronic resource.
	10. When you have confirmed access and finished all other updates for this resource, click on the **Save** button to complete the activation task for this portfolio.
	11. One final step is to change the status of this activation to **Done**. Doing so indicates to other Electronic Resources operators that the activation work for this portfolio has been completed. Click on the *More actions* menu and select the **Done** option.

Create an Invoice for an Electronic Portfolio Subscription

Goals of this exercise: • Create an invoice from a PO for an electronic portfolio subscription • Update the Renewal Date in the PO Line	
❗• **Note: An individual with the Invoice Operator role is required to create invoices.** ❗• **Note: Continuous orders, both electronic and print, <u>always</u> have the status of Waiting for Renewal.**	1. Open the Acquisitions menu and select *Create Invoice* under the **Receiving and Invoicing** submenu. 2. Choose to create an invoice **From PO**. (The screen will refresh before you are able to click on the **Next** button.) 3. Enter the PO number or search for the PO by clicking on *Select from a list*. When the PO is found, you will be able to confirm that the details match, especially as regards the vendor. 4. Click on the **Save** button to create the invoice. You will be taken to the *Invoice Lines* tab. 5. Review the details for the invoice line. Is the price estimated at the time of ordering still correct? Is the fund assigned to the invoice line correct? If so, go to the *Summary* tab. 6. Review the details on the *Summary* tab. If desired, modify the *Invoice number* and *Invoice date*. Confirm the *Vendor* and *Vendor account* information. Ensure that the *Total invoice lines amount* (calculated from the *Invoice Lines* tab) and the *Total Amount* are equal.

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	7. Click on the **Save and Continue** button, in the upper right corner, to complete this invoice.
	8. Return to the PO line for this title to edit it and update the renewal date for this subscription, moving it ahead by a year. **Save** the PO line.

Activate an Electronic Collection

Goals of this exercise:

- Activating an electronic collection
- Working in the Electronic Collection Editor
- Working in the Electronic Service Editor
- Testing and confirming access

Electronic Collection Editor	1. Open the Resources menu and select *Manage Electronic Resource Activation* under the **Manage Inventory** submenu. On the **Unassigned** tab, identify the title you will activate, for example, *Gale Cengage Shakespeare Collection Periodicals*, with the *PO Line 7860*.
	2. From the *More actions* menu, choose **Activate** and **Confirm** that you want to continue (or **Cancel** if you do not want to proceed). The electronic collection is now activated and available for editing. **Confirm** that you want to continue (or **Cancel** if you do not want to proceed).
	3. Review the information on the **Electronic Collection Description** tab. If preferred, enter information in the *Public name (override)* or *Internal description* fields. Confirm that the *Library* "owning" this resource is correct. Notice that the collection level record is suppressed from discovery.
	4. Review the information on the **General** tab. You should see details about the collection. Choose *Access* type, either **Current** or **Perpetual** depending on what you have purchased from the vendor. Confirm that the *PO Line* and *License* include expected information, making changes if required.
	5. On the **Additional** tab, you will see the *Electronic Collection Level URL*. Indicate whether or not the collection *is free* and should have *Proxy enabled*. Scroll down a little further to see the number of portfolios that will be activated as part of this collection and further still until the *Services* area. Click on the *More actions* menu to select

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	Activate for all of these portfolios. When done, a "success" message appears. 6. Click on the *More actions* menu again and select **Edit** to be taken to the *Electronic Service Editor*.

Electronic Service Editor	7. On the **Activation** tab, review the information associated with this service:
	    a. *Service activation status:* Available
	    b. *Activate new portfolios associated with service automatically?:* Yes
	    c. *Active from* and *until dates:* enter dates that match the collection you have purchased
	    d. Should the service be temporarily unavailable at any time, you may use this area to identify when this starts and why
	
	8. Review the **Service Description** tab and enter descriptive information if preferred.
	
	9. Review the information on the **Linking** tab. In this example, we are able see *Parser parameters* associated with this resource. **Confirm** that the parser parameters are as expected. Change *Crossref enabled* and *Proxy enabled*, as appropriate, and select the *Proxy*. Scroll down to the *Linking Parser Parameters* area and enter an appropriate value for your institution.
	
	10. On the **Portfolios** tab, review the portfolios that are part of this collection to ensure that all are active with correct coverage. **Edit** and **Test Access** for individual portfolios as appropriate.
	
	11. On the **Notes** tab, you may include information related to authentication and public display.
	
	12. Review the **History** tab to confirm the actions that have occurred with regard to this electronic resource. Click on the **Save** button to update all of these details and be returned to the *Electronic Collection Editor*.

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Electronic Collection Editor	13. On the **Notes** tab, in the *Electronic Collection Editor*, you may include information related to authentication and public display.
	14. Review the **History** tab to confirm the actions that have occurred with regard to this electronic resource.
	15. When you have confirmed access and finished all other updates for this resource, click on the **Save** button to complete the activation task for this electronic collection.
	16. Two final tasks need to be performed:
	a. **Unsuppress** the collection level record so that it may be published to discovery. Click on the *More actions* menu and selecting **Unsuppress** from the options that display and **Confirm**.
	b. Click on the *More actions* menu once more and select the **Done** option to complete our work.

Create an Invoice for an Activated Electronic Collection Subscription

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Goals of this exercise:
• Create an invoice from PO for an activated electronic subscription • Update the Renewal Date in the PO Line

| **!** **Note: An individual with the Invoice Operator role is required to create invoices.**

! **Note: Continuous orders, both electronic and print, <u>always</u> have the status of Waiting for Renewal.** | 1. Open the Acquisitions menu and select *Create Invoice* under the **Receiving and Invoicing** submenu.

2. Choose to create an invoice **From PO**. (The screen will refresh before you are able to click on the **Next** button.)

3. Enter the PO number or search for the PO by clicking on *Select from a list*. When the PO is found, you will be able to confirm that the details match, especially as regards the vendor.

4. Click on the **Save** button to create the invoice. You will be taken to the *Invoice Lines* tab.

5. Review the details for the invoice line. Is the price estimated at the time of ordering still correct? Is the fund assigned to the invoice line correct? If so, go to the *Summary* tab. If not, edit as appropriate. |

	6. Review the details on the *Summary* tab. If desired, modify the *Invoice number* and *Invoice date*. Confirm the *Vendor* and *Vendor account* information. Ensure that the *Total invoice lines amount* (calculated from the *Invoice Lines* tab) and the *Total Amount* are equal.
	7. Click on the **Save and Continue** button, in the upper right corner, to complete this invoice.
	8. Return to the PO line for this electronic collection to edit it and update the renewal date for this subscription, moving it ahead by a year. **Save** the PO line.