



Purchasing Workflows for Physical Resources

Ex Libris Professional Services

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Glossary of Purchasing Workflows Terms

Purchase Order Line (POL): sometimes referred to as an *order line*; three types of PO lines are managed in Alma; once a PO line is created, the type of PO line may not be changed.

- **One-time:** used for one-time or infrequent orders such as manuscript : map : microform : mixed material : musical score : print book : sound recording : visual material
- **Standing order:** used for orders that are repeated, but not on a regular basis such as printed book : monograph : non-monograph
- **Continuous:** Used for orders that are repeated on a regular basis such as print journal : supplements : indexes

Purchase Order (PO): a purchase order gathers POLs when they match the same vendor account, owner, currency, continuity (one-time/standing order/continuous), acquisition method and source type (Alma entry-mode).

Reporting Code: attribute of a PO Line or invoice line that codes a type of material within the ledger and fund system; these codes allow reporting on funds by attributes other than the funds hierarchy.

Reviewing: the POL or the PO requires manual review by a Purchasing Manager or Operator in case of problems; once resolved, the POL or PO will continue on through the workflow.

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Packaging: PO lines are packaged automatically into a single purchase order; as a default, packaging is set to Automatic (Auto Packaging status).




Approval: PO has to be approved by the Purchasing Manager; as a default, configuration for Approval is set to Automatic.


Order Now: use to record that you have ordered an item without sending the PO/POL to the vendor (item was already ordered via vendor's Web site); this approach results in the PO having one POL only

Renewal: governs the manner in which a PO line is marked for renewal during its creation, to the point at which the material is renewed; this option applies to PO line type of Continuous only.

Deferral: governs the manner in which a PO line is handled from the time it is deferred to the point at which it is either reactivated or cancelled.

Create a Purchase Order Line – Print – One Time

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • Create a purchase order line via an internal Repository Search or by searching an External Resource 	
<p>Via Repository Search</p> <p>! Note: Alma one instance of a Holdings record containing the same library and location details.</p> <p>! Note: Review other options in the Acquisition Method drop-down field to become familiar with them.</p>	<ol style="list-style-type: none"> 1. Log in to the Alma sandbox and perform an <i>All titles – Title</i> search for a title such as, Teach like your hair's on fire by Rafe Esquith. Check which library currently owns this title by clicking on Physical situated below the repository entry. 2. From the <i>More actions</i> menu  for the title (or with a right-click), choose the Order option to start the ordering process. You will be taken to the <i>PO Line Owner and Type</i> page. 3. Fill in the mandatory Purchase Type and PO Line owner fields. For Purchase Type, choose Print Book - One Time from the <i>Recommended</i> list. For PO Line Owner, select a different library than the one noted above in #1. Click on Create PO line to go to the next step. If asked to confirm that you want to order an item that already exists in the inventory, click on the Confirm button. 4. Fill in the Material Supplier (Vendor), a mandatory field; you may either enter the vendor code or click on <i>Select from a list</i>  to locate a vendor such as Coutts, Yankee Book Peddler or Baker & Taylor. Expected receipt after ordering (days) is automatically populated from the vendor account's record; you may change it. 5. Enter the List Price and press the Tab button to assign the price for this item. Review the Quantity for pricing, making a change if necessary. Both are mandatory fields. If a discount is associated with the vendor record, the discount percent is automatically populated; you may change it. Further, you may add a one-time discount at this time. 6. In the <i>Funding</i> section, click on the Add Fund link to enter a fund code or click on <i>Select from a list</i>  to locate the fund you want to use. Be sure to click on the Add fund button. 7. For this exercise, select Acquisition Method of Purchase at Vendor System (i.e., the actual order was placed at the vendor Web-site.) 8. Confirm the Material Type and choose from the drop-down list for Reporting Code along with Secondary and Tertiary reporting codes,

<p>=====</p> <p>Via Search External Resources</p> <p>! • Note: to search External Resources, the role of Cataloger must be assigned to Purchasing operators.</p> <p> The shopping cart image functions as a link to create a new POL from within the Metadata Editor.</p>	<p>as appropriate.</p> <p>9. At the top right, click on Order Now to complete the PO line. If asked to confirm that you want to order an item that already exists in the inventory, click on the Confirm button.</p> <p>10. Take note of the PO Line number that is assigned and search for it by changing the search index to Order lines and entering the number.</p> <p>=====</p> <ol style="list-style-type: none"> 1. Open the Resources menu and choose <i>Search External Resources</i>. 2. From the Search Cataloging Profile select <i>Library of Congress</i> from the drop-down list. Search for any name, term or phrase using any of the indexes to retrieve results. 3. Identify a record and click on the View button, at the far right, to confirm that it is correct. If <u>not correct</u>, click on the Back to Results button to make another choice. If <u>correct</u>, click on the Import button to import the record in the local repository. 4. To create a PO line for this item, click on the shopping cart image in the toolbar at the top of the Metadata Editor or press the key combination, Ctrl+Alt+O. In either case, you will save the record to the repository, exit from the Metadata Editor and be taken to the <i>Purchase Type and PO Line Owner</i> page. 5. Enter Purchase Type and PO Line owner, choosing Print Book - One time and selecting <i>Main Library</i> as PO Line Owner. Click on Create PO line. 6. Add <i>Material Supplier</i>, enter the <i>List Price</i>, choose and add a <i>Fund</i>. 7. Choose Acquisition Method = Purchase at Vendor System, Material Type and Reporting Codes, from their respective drop-down lists, as appropriate. 8. Review the PO line before clicking on the Order Now button to create the PO line. Once the PO line is saved, search for it.
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Create a Purchase Order Line – Continuous

<p>Goals of this exercise:</p>

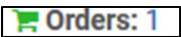

- Create a purchase order line for a subscription

Via Repository Search

! • **Note: To receive periodical subscription issues, i.e. perform check-in, a POL is required.**

! • **Note: Continuous POLs always have the status of *Waiting for Renewal*. This status concurs with the expectation that you will renew this subscription repeatedly.**

! • **Note: If the POL is marked as *Manual Renewal*, it will appear in the renewals task list for manual processing. If the POL is set for *Automatic Renewal*, Alma takes care of the renewal automatically according to the renewal date and updates the information accordingly.**

1. In the Alma sandbox, perform a *Physical titles - Titles* search for the terms, "**journal of.**" You will know whether or not an order already exists for the title when Orders information displays as part of the repository entry: 
2. From the *More actions* menu for the title  (or with a right-click), choose the **Order** option to start the ordering process. You will be taken to the *PO Line Owner and Type* page.
3. Enter Purchase Type and PO Line owner, choosing **Print Journal - Subscription** and selecting the appropriate library as **PO Line Owner**. Click on **Create PO line**.
4. Add/change the *Location* to **Periodicals** (or however you designate the location), fill in the *Material Supplier*, enter the *List Price*, choose and add a *Fund*.
5. Choose **Acquisition Method = Purchase at Vendor System**, **Material Type = Issue** and **Reporting Codes**, from their respective drop-down lists.
6. In the **Renewal** section, fill in details for required fields, *Renewal date*, and *Renewal reminder period (days)*, and others, *Subscription date From/To*, as you wish.
7. Review the PO line before clicking on the **Order Now** button to create the PO line. Once the PO line is saved, search for it.
8. Take note of the PO Line number that is assigned and search for it by changing the search index to **Order lines** and entering the number.

Create a Purchase Order Line – Standing Order

<p>Goals of this exercise:</p> <ul style="list-style-type: none"> • Create an PO line for a standing order 	
<p>! Note: Standing orders are used for materials purchased from the same vendor with irregular or unpredictable frequency.</p> <p>Examples include:</p> <ul style="list-style-type: none"> • All print books by a particular author • An encyclopedia or dictionary set published irregularly over a period of years 	<ol style="list-style-type: none"> 1. Open the Resources menu and choose <i>Search External Resources</i>. From the Search Cataloging Profile select <i>Library of Congress</i> from the drop-down list. Search for a series title in any of the indexes to retrieve results. 2. Identify a record and click on the View button, at the far right, to confirm that it is correct. If <u>not correct</u>, click on the Back to Results button to make another choice. If <u>correct</u>, click on the Import button to import the record in the local repository. 3. Alternately, create a Bibliographic record in Alma to act as the series title for the purposes of ordering. If using this approach, determine whether or not this series record should be suppressed from discovery. 4. To create a PO line for this item, click on the shopping cart image in the toolbar at the top of the Metadata Editor or press the key combination, Ctrl+Alt+O. In either case, you will save the record to the repository, exit from the Metadata Editor and be taken to the <i>Purchase Type and PO Line Owner</i> page. 5. Enter Purchase Type and PO Line owner, choosing Print Book – Standing Order and selecting the appropriate library to be the PO Line Owner. Click on Create PO line. 6. Add <i>Material Supplier</i>, enter <i>List Price</i> entering a placeholder cost for the series, choose and add a <i>Fund</i>. 7. Choose Acquisition Method = Purchase at Vendor System, Material Type and Reporting Codes, from their respective drop-down lists, as appropriate. 8. Review the PO line before clicking on the Order Now button to create the PO line. Once the PO line is saved, search for it so that you may identify the PO number.