Creating purchase orders (POs) in Alma

In Alma POs are created “backwards” from the way in Voyager. You create PO lines (POLs) first and then “package” the lines into a PO. Search for a bibliographic record for the item to be ordered. Search “All titles” by ISBN or title. If there is a matching record in the IZ use that (there should only be a matching record in the IZ if it is a re-order, either because the initial order was cancelled or we are ordering additional copies), otherwise use one from the NZ. Don’t use records from the CZ because they are for electronic resources only. Make sure the ISBN matches and that it is for the correct format (physical vs. electronic). If no record is found then one will need to be downloaded from OCLC using Connexion or you can search WorldCat through the Alma metadata editor (MDE).

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To search WorldCat through the MDE:
Click on **Resources** menu 🡪 **Cataloging** 🡪 **Open Metadata Editor (**or click on the **“Show MDE”** icon**)**
In MDE click on the **Search & Browse** menu 🡪 **Search Resources**
In **Search Cataloging Profile** choose **WorldCat**
Then search for the record you need. Searching by ISBN is usually the easiest method.
When you locate the correct record, click on **Import**
Click on **Record Actions** menu 🡪 **Set management tags** 🡪 **Export to WorldCat** 🡪 check **Don’t publish**
Click **Save and Release Record**Exit the MDE

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Please note: When entering information in fields in Alma DO NOT press ENTER because that will take you out of that screen before you intend to.

Click on **Order**
**PO line type**: choose the appropriate type for the item from the recommended list (e.g., “Print Book – One Time”
**PO line owner**: choose Rock Valley College Library
Make sure that **Generate barcode using sequence** is blank
**Assign inventory manually**: leave the box unchecked
If using a template click on the drop-down menu in **Load from template** and choose the appropriate template to use
Click on **Create PO line***If you are using a template all of the information in the next section, except for* ***List price****, should already be filled in. But check it for accuracy!*

Under **Ordered items** click **+Add Location** and choose the appropriate intended location for the item and click **Add**
Under **Vendor Information** fill in the **Material supplier** field with the vendor name or code
Under **Pricing** fill in **List price** with the item’s price
Under **Funding** click **+Add fund**
Look up the fund by name or code (e.g., Books and binding (boo)) then click **Add fund**
Under PO line details, in **Acquisition method** choose “Purchase at Vendor System” (or “Gift” if it is a donation)
In **Material type** choose the appropriate type
In **Reporting code** choose the appropriate entry (these correspond to locations or types of orders)
In **Secondary reporting code** choose the appropriate entry which corresponds to the requestor’s patron group or department for faculty
**Manual packaging**: check the box! (this is very important)

Click on **Interested Users** tab and click on **+Add Interested Users**
Search for the name of the requestor
Check the boxes for “Notify user upon receiving/activation” and “Notify upon cancellation”
Click **Add and Close**
Click **Save and Continue**

If you found the bib record in the NZ rather than downloading it from WorldCat:
Look up record
Click on **Edit Record**
Click on **Record Actions** menu 🡪 **Set management tags** 🡪 **Export to WorldCat** 🡪 check **Don’t publish**Click **Save and Release Record**
Exit the MDE

Repeat process for each item on the PO.

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To package the purchase order lines (POLs) into a purchase order:
Go to **Acquisitions** and under **Purchase Order** select **Package**Make sure that all of the purchase order lines to be packaged are on the same page because “Select All” only selects all records on the current page. If they are not you can change the number of results per page at the bottom right corner of the screen.
Check the box: **Select All**
Click **Create new PO**

On the **PO Summary** screen change the **PO number** to whatever it should be (e.g., B9413-B)
Make sure that **Total PO cost** matches the total of the actual order
Click **Save** (which keeps it in “review” status) (Choosing **Save and Continue** prevents it from going to “review” status)
This will allow Brent to review the PO before it is finalized.
To review PO, go to **Acquisitions** menu 🡪 **Purchase Order** 🡪 **Review**From the row actions menu (…) choose **Edit**
Click **Save and Continue**PO will now have a status of “sent”