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Introduction to Acquisitions

Acquisitions is the process by which an institution acquires new items or services. "New" means either copies of items that already exist in the inventory, new items without holdings that are defined in the Institution, Community, or Network Zones, or extensions or additions to existing services (such as additional users for an electronic resource). Alma provides a step-by-step process that guides all acquisitions. Alma handles many kinds of acquisitions, including physical, electronic, and digital, and including standing orders, periodical subscriptions, and renewals.

After defining vendors and their parameters, such as how to communicate with them, the acquisition workflows include purchasing, invoicing, and managing trials. Alma can be configured to handle various special payments and processing due to added tax, returns, split invoice payments, and so forth.

Watch the Acquisitions Overview video (5:00 mins).

Acquisitions contains the following workflows/sections:

Before you can begin working with the Acquisitions workflows, you must ensure that the Purchasing Manager has properly set up the Acquisitions infrastructure. For details, see Acquisitions Infrastructure.

- **Acquisitions Infrastructure** – Before purchasing anything, you must ensure that your acquisitions infrastructure is configured. Add all relevant vendors and vendor accounts, enter information about your funds and ledgers, and enter information about your licenses and license amendments. When required, you can perform fund allocation transfers (move money between funds in the same fiscal period). For a detailed explanation of the Acquisitions infrastructure, see Acquisitions Infrastructure.

- **Purchasing** – Handle purchase order (PO) lines from the point of their creation to the point at which they await activation or receipt. Purchases can be for physical or electronic material. Purchases can be one-time, continuous for serial publications, or standing orders for new books by certain authors (for example). Received items can be shelf-ready (already with barcodes) and/or require additional processing (such as sending to the correct department, copy cataloging, or notifying patrons who are waiting for it). For a detailed explanation of the purchasing workflow, see Purchasing Workflow.

- **Invoicing** – Handle invoices from the point of their creation to the point at which the invoices are closed. Invoices are processed to determine if they require special attention and may be exported to be handled by an ERP system. For a detailed explanation of the invoicing workflow, see Invoicing Workflow.

- **Renewals** – Mark PO lines for renewals of subscriptions for both electronic and physical material, such as magazines, journals, or periodicals, during their creation to the point at which the materials are renewed. For a detailed explanation of the renewal workflow, see Renewal Workflow.

- **Deferring PO Lines** – Handle PO lines from the time they are deferred to the point at which they are either reactivated or canceled. For a detailed explanation of the deferring PO line workflow, see Deferring PO Line Workflow.

- **Evaluations** – Handle PO lines from the point of their creation for the evaluation (trial) to the point at which a decision is made whether or not to purchase the electronic materials. Evaluations refer to when a vendor offers new electronic material for evaluation or a request is received from a member of the institution to have electronic material evaluated. For a detailed explanation of the evaluations workflow, see Evaluation Workflow.

- **Import Processing** – You can monitor and resolve issues with jobs that import records of newly acquired material. For more information, see Import Processing.

- **PO Line Sets and Processes** – To globally change multiple PO lines, you must first search for the PO lines, create PO line sets, and then run jobs on these sets. For a detailed explanation, see Searching for PO Lines, Managing Jobs and Sets, and Running Manual Jobs on Defined Sets.
• **Advanced Tools** – Advanced acquisitions activities include viewing exchange rate reports, rolling over ledgers and PO lines (from one fiscal period to the next), and managing patron-driven acquisitions (PDA). For a detailed explanation of the advanced tools, see [Advanced Tools](#).

• **Configuring Acquisitions** – As an administrator, you must configure the parameters for all of the acquisitions activities. For a detailed explanation, see [Configuring Acquisitions](#).
Purchasing

This section includes:

- **Purchasing Workflow**
- **Creating PO Lines**
  - Real-Time Ordering
  - Manually Creating a PO Line
  - Creating Service Subscription PO Lines Without Inventory
  - Working With Legal Deposits
  - Purchase Requests
  - Check Availability and Pricing
- **Searching for PO Lines**
- **Reviewing PO Lines**
- **Packaging PO Lines into a PO**
- **Approving and Sending POs**
- **Managing EDI Order Report Tasks**
- **Deleting POs**
- **Receiving Material**
  - Receiving Physical Material
  - Post-Receiving Processing
- **Processing Claims**
- **Closing, Reopening, and Relinking PO Lines**
Introduction to Purchasing Workflows

The following is an illustration of the purchasing workflow that specifies the way in which a purchase order line (PO line) is handled from its creation until it awaits activation or receipt. This workflow does not cover patron-driven acquisitions.

For an explanation of the physical and electronic purchase types and PO line types that can be created, and the ramifications of the purchase type and PO line type on both the purchasing workflow and resulting inventory, see Explanation of Purchase Types Workflow and Inventory. For information on determining which workflow to follow when acquiring electronic resources, see Electronic Resources – Scenarios and Workflows.

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1. A PO line enters Alma, typically: automatically through an embedded order data (EOD) import or a real-time API through a Library Service Provider (LSP), or manually as a result of the creation of a PO line. See the Required Steps to Create an Order section, below, for electronic/physical material types. See also Creating PO Lines.

2. Alma normalizes, validates, and processes the PO line to determine whether there are elements that require special attention based on the review rules pre-configured by an administrator.

3. If there are data issues (including invalid or missing information) or alerts that require attention, Alma sends the PO line for review. For information, see Reviewing PO Lines.
4. The PO line is packaged into a PO. The purchasing configuration, configured on the PO Line Summary page (see Manually Creating a PO Line), determines if the packaging is automatic or manual.
   - **Automatic** – PO lines are automatically packaged according to the rules in a PO (see Packaging PO Lines into a PO).
   - **Manual** – The PO line is packaged manually. For information, see Packaging PO Lines into a PO. When the person performing the manual packaging selects Package on the Create Purchase Orders page, the PO line is packaged into a PO.

   **Note**
   If, during the packaging process (manual or automatic), any of the mandatory fields (required in this step) is incomplete, the PO is sent back for review. For information, see Reviewing POs. After reviewing the PO and entering the missing information, the PO proceeds to where it is approved and sent to the vendor.

5. The PO proceeds to the approval and sending stage of the workflow. The purchasing configuration (configured by Ex Libris) determines whether the approval and sending is automatic or manual.
   - **Automatic** – The PO is approved automatically and sent to the vendor.
   - **Manual** – The PO must be approved manually before it is sent to the vendor. For information, see Approving and Sending POs. When the person performing the manual approval selects Approve and Send on the Approve Purchase Orders page, the approved PO is sent to the vendor.

   **Note**
   The PO is subject to approval whether the PO was created manually or using EOD, and whether it is configured with manual or automatic packaging. However, if the user selects Order Now for a PO line, the PO is approved automatically, regardless of the purchasing configuration.

6. The PO line proceeds to the final stage of the purchasing workflow, where it is checked to verify whether it is for electronic or physical material.
   - **Electronic** – The PO line proceeds to the activation stage (see Activating Electronic Resources).
   - **Physical** – The PO line proceeds to the receiving stage, where it is handled according to its type, as described in Receiving Material. Post-receiving processing may also be performed after the material is received (see Post-Receiving Processing).

   If the PO line is One-Time, it closes when fully invoiced and received/activated. If it is not fully invoiced, it is marked as Waiting for Invoice in the Invoice Status field of the PO Line Summary page, and awaits invoicing (see Invoicing).

   If the PO line is Continuous, after it is received/activated it is marked Waiting for Renewal. You can manually mark the PO line as Closed if it is fully paid and you are ending the subscription, even if the last issue has not yet been received.

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**Required Steps to Create an Order**

The three primary ways to create orders are:

- **Manually** - For information on creating service subscription PO lines for services without inventory, see Creating Service Subscription PO Lines Without Inventory.
- **EOD process**
• **Real-Time ordering** via API (through library service provider)

The methods described above can create orders for both **physical** and **electronic** resource material types. See the lists below for the steps required to create an order for each one of the material types:

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**Note**

For electronic **orders originating from OASIS** it is recommended to use the API approach for complete descriptive information and access information.

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**Physical Resources Order Methods**

**Physical – Manual order**

<table>
<thead>
<tr>
<th>Configuration action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No special configuration is needed for manual ordering</td>
<td></td>
</tr>
</tbody>
</table>

**Physical – EOD (embedded order data)**

<table>
<thead>
<tr>
<th>Configuration action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure default Metadata template</td>
<td>Ensure that a <strong>default metadata template</strong> is configured. Open <strong>Metadata Editor &gt; Template</strong>. Choose the template you want to define as a default. Select <strong>Properties</strong>, and select as default.</td>
</tr>
<tr>
<td>Vendor settings</td>
<td>Make sure that the vendor in Alma is configured not to send outgoing EDI messages for POs. Other EDI messages (e.g. for invoices) can be sent if this is your workflow. <a href="#">Read more about vendor EDI</a></td>
</tr>
<tr>
<td>Provide the vendor with relevant ordering information</td>
<td>For the vendor to be able to create orders in Alma it needed to know some mandatory parameters: <strong>Owning Library code(s)</strong> – the library that the created PO line will be assigned to. You must supply a list of possible owning library codes to the vendor. The implementation on the vendor side might be to give a drop-down on the ordering form, to choose the relevant owning library. Other implementation might be to associate an account to a single owning library. In this case, the operator must be logged in with the relevant account.</td>
</tr>
</tbody>
</table>

**Note**

The vendor can use the [retrieve libraries API](#) in order to get full list of libraries, or the [get library API](#) in order to check a code of specific library.
<table>
<thead>
<tr>
<th>Configuration action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location code(s) – this is the location in which the related item(s) will be created. Relevant only for physical material.</td>
<td></td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td></td>
</tr>
<tr>
<td>The vendor can use the retrieve locations API in order to get the list of locations.</td>
<td></td>
</tr>
<tr>
<td>Fund code(s) – this is the fund from which the payment will be done.</td>
<td></td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td></td>
</tr>
<tr>
<td>The vendor can use the Retrieve funds API.</td>
<td></td>
</tr>
</tbody>
</table>

Create a New Order import profile or copy an existing profile

Go to Acquisitions > Manage import profiles. Ensure that the Vendor reference number information received from the EDI invoice is mapped to Alma. See Managing Import Profiles.

Ensure that you have the correct Submission Format option selected

Configure an Update inventory import profile

Go to Acquisitions > Manage import profiles. When the invoice is received for order created with EOD, the vendor places a full MARC records file on their FTP server. Alma imports the full MARC record, uses the update inventory import profile to match that record to the PO line, and overlays the brief records. A match is done either by PO line number or by vendor reference number.

### Physical – API

<table>
<thead>
<tr>
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<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Configure default Metadata template</td>
<td></td>
</tr>
<tr>
<td>Ensure that a default metadata template is configured. Go to Metadata Editor &gt; template. Choose the template to define as a default. Select Properties. Select as default.</td>
<td></td>
</tr>
<tr>
<td>Send vendor the API key</td>
<td></td>
</tr>
<tr>
<td>An API key should be generated by the institution and supplied to the vendor.</td>
<td></td>
</tr>
<tr>
<td>Configuration action</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>Each vendor should be supplied with a unique separate API key. In this way, should the event arise whereby the institution wants to discontinue working with a specific vendor, then that specific API key can be disabled via the developer’s network. Other API keys will continue functioning as usual.</td>
</tr>
<tr>
<td></td>
<td>• Login to the Developers Network using the institution account</td>
</tr>
<tr>
<td></td>
<td>• Define an application with the name, Integration with vendor.</td>
</tr>
<tr>
<td></td>
<td>• Add Acquisition API to the application, with read/write permissions.</td>
</tr>
<tr>
<td></td>
<td>• Add Configuration API to the application, with read only permissions.</td>
</tr>
</tbody>
</table>

**Note**

You can define the API with your sandbox or with production environments.

- Copy the API key of the application. This is the API key that will be used as part of the vendor API calls in order to identify your institution.
- We recommend defining an API restriction profile. For more information, see [Working with API restriction profiles](#).

<table>
<thead>
<tr>
<th>Provide the vendor with relevant ordering information</th>
<th>The following parameters are mandatory for vendors to create orders in Alma:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Vendor code</strong> and <strong>Vendor account code</strong> – These refer to the vendor record in Alma. The created PO line will be related to that vendor and vendor account. Verify that this vendor in Alma is configured not to send outgoing EDI messages for POs. Other EDI messages (e.g. for invoices) can be sent if this is your workflow.</td>
</tr>
<tr>
<td></td>
<td><strong>Owning Library code(s)</strong> – The library that is assigned to the new PO line. You will need to supply a list of possible owning library codes to the vendor. The implementation on the vendor side can include a drop-down on the ordering form, to choose the relevant owning library. Another approach can be to associate an account to a single owning library. In this case, the operator will have to be logged in with the relevant account.</td>
</tr>
</tbody>
</table>

**Note**

The vendor can use the [retrieve libraries API](#) in order to get full list of libraries, or the [get library API](#) in order to check a code of specific library.

- **Location code(s)** – The location created for the related item(s). Only relevant for physical material.

**Note**

The vendor can use the [retrieve locations API](#) in order to get the list of locations.

- **Fund code(s)** – The fund from which the payment is generated.

**Note**

The vendor can use the [Retrieve funds API](#).

For more information, please see [Real Time Acquisitions Setup for Institutions](#).
### Configuration action

<table>
<thead>
<tr>
<th>Configuration action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create New order integration profile</td>
<td>New Order API Integration Profile determines the matching rules that you want to apply. For more information, see How the bibliographic record is determined. Validations for fund related issues can also be configured as documented here (docx).</td>
</tr>
<tr>
<td>Configure an Update inventory import profile</td>
<td>When creating orders in Alma via API for physical/electronic materials, a Brief record is created in Alma containing basic fields of the created MARC record. An update inventory import profile is used to find these brief records (using the purchase order line number or the vendor reference number) and overlay it with the full MARC information. See Overlaying a Brief Record.</td>
</tr>
</tbody>
</table>

### Electronic resources order methods

**Electronic – Manual order**

<table>
<thead>
<tr>
<th>Configuration action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No special configuration is needed for manual ordering</td>
<td></td>
</tr>
</tbody>
</table>

**Electronic – EOD (embedded order data)**

<table>
<thead>
<tr>
<th>Configuration action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure default Metadata template</td>
<td>Ensure that a default metadata template is configured. Go to Metadata Editor &gt; template. Choose the template you want to define as a default. Select properties and select as default.</td>
</tr>
<tr>
<td>Vendor settings</td>
<td>Verify that the vendor in Alma is configured not to send outgoing EDI messages for POs. Other EDI messages (e.g. for invoices) can be sent if this is your workflow. Read more about vendor EDI</td>
</tr>
<tr>
<td>Provide the vendor with relevant ordering information</td>
<td>For the vendor to be able to create orders in Alma it needed to know some mandatory parameters: <strong>Owning Library code(s)</strong> – The library that is assigned to the new PO line. You will need to supply a list of possible owning library codes to the vendor. The implementation on the vendor side can include a drop-down on the ordering form, to choose the relevant owning library. Another approach can be to associate an account to a single owning library.</td>
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<td>In this case, the operator will have to be logged in with the relevant account.</td>
<td>[Note] The vendor can use the <code>retrieve libraries API</code> in order to get full list of libraries, or the <code>get library API</code> in order to check a code of specific library.</td>
</tr>
<tr>
<td>Location code(s) – The location created for the related item(s). Only relevant for physical material.</td>
<td>[Note] The vendor can use the <code>retrieve locations API</code> in order to get the list of locations.</td>
</tr>
<tr>
<td>Fund code(s) – The fund from which the payment is generated.</td>
<td>[Note] The vendor can use the <code>Retrieve funds API</code>.</td>
</tr>
<tr>
<td>For more information, please see <a href="#">Real Time Acquisitions Setup for Institutions</a>.</td>
<td></td>
</tr>
</tbody>
</table>

**Create a new order** import profile or copy an existing profile

Go to **Acquisitions > Manage import profiles**. Ensure that the Vendor reference number information received from the EDI invoice is mapped to Alma. See [Managing Import Profiles](#).

**Ensure that you have the correct Submission Format option selected**

**Configure an Update inventory import profile**

Go to **Acquisitions > Manage import profiles**. When the invoice is received for order created with EOD, the vendor places a full MARC records file on their FTP server. Alma imports the full MARC record, uses the update inventory import profile to match that record to the PO line, and overlays the brief records. A match is done either by PO line number or by vendor reference number.

**Electronic – API**

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<td>Configure</td>
<td>Ensure that a <a href="#">default metadata template</a> is configured. Go to <strong>Metadata Editor &gt; template</strong>. Choose the template to define as a default. Select <strong>Properties</strong>. Select as default.</td>
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<tr>
<td>default metadata template</td>
<td>An API key should be generated by the institution and supplied to the vendor. Each vendor should be supplied with a unique separate API key. In this way, should the event arise whereby the institution wants to discontinue working with a specific vendor, then that specific API key can be disabled via the developer’s network. Other API keys will continue functioning as usual.</td>
</tr>
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</table>
| Send vendor the API key | • Login to the Developers Network using the institution account  
• Define an application with the name, Integration with vendor.  
• Add Acquisition API to the application, with read/write permissions.  
• Add Configuration API to the application, with read only permissions. |
| Provide the vendor with relevant ordering information | The following parameters are mandatory for vendors to create orders in Alma:  
**Vendor code** and **Vendor account code** – These refer to the vendor record in Alma. The created PO line will be related to that vendor and vendor account. Verify that this vendor in Alma is configured not to send outgoing EDI messages for POs. Other EDI messages (e.g. for invoices) can be sent if this is your workflow.  
**Owning Library code(s)** – The library that is assigned to the new PO line. You will need to supply a list of possible owning library codes to the vendor. The implementation on the vendor side can include a drop-down on the ordering form, to choose the relevant owning library. Another approach can be to associate an account to a single owning library. In this case, the operator will have to be logged in with the relevant account. |
| | Note  
The vendor can use the retrieve libraries API in order to get full list of libraries, or the get library API in order to check a code of specific library.  
**Location code(s)** – The location created for the related item(s). Only relevant for physical material.  
Note  
The vendor can use the retrieve locations API in order to get the list of locations.  
**Fund code(s)** – The fund from which the payment is generated. |
Electronic Resources Order Methods for Orders Originating from OASIS

See Real-Time ordering for full list of providers.

Electronic – API

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<td>Send vendor the API key</td>
<td>An API key should be generated by the institution and supplied to the vendor. Use <a href="mailto:OASIS-Onboarding@proquest.com">OASIS-Onboarding@proquest.com</a> to contact OASIS</td>
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<td>• Define an application with the name, <strong>Integration with vendor</strong>.</td>
</tr>
<tr>
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<td>• Add <strong>Acquisition</strong> API to the application, with read/write permissions.</td>
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**Note**

The vendor can use the Retrieve funds API.

For more information, please see Real Time Acquisitions Setup for Institutions.
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<td>• Copy the API key of the application. This is the API key that will be used as part of the vendor API calls in order to identify your institution.</td>
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<td>• We recommend defining an API restriction profile. For more information, see <a href="#">Working with API restriction profiles</a>.</td>
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</tr>
<tr>
<td>The vendor can use the <a href="#">retrievelocations API</a> in order to get the list of locations.</td>
<td></td>
</tr>
<tr>
<td><strong>Fund code(s)</strong> – The fund from which the payment is generated.</td>
<td></td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td></td>
</tr>
<tr>
<td>The vendor can use the <a href="#">Retrieve funds API</a>.</td>
<td></td>
</tr>
<tr>
<td>For more information, please see <a href="#">Real Time Acquisitions Setup for Institutions</a>.</td>
<td></td>
</tr>
</tbody>
</table>

<p>| Create <strong>New order integration profile</strong> | New Order API Integration Profile determines the matching rules that you want to apply. For more information, see <a href="#">How the bibliographic record is determined</a>. Validations for fund related issues can also be configured as documented <a href="#">here</a> (docx). |
| Activate the | To successfully create an electronic resource (portfolio) within a collection in Alma, the institution must have the relevant |</p>
<table>
<thead>
<tr>
<th>Configuration action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>relevant collection from the community zone</td>
<td>collection in their Institution Zone activated from the Community Zone. Currently, the functionality of creating the resource within a collection during the order process is available only for orders originating from OASIS and GOBI from their supported eBook platforms. See Activating Electronic Resources</td>
</tr>
</tbody>
</table>

**Explanation of Purchase Types Workflow and Inventory**

Once a PO line is created with a certain purchase type, the workflow and data implications are fixed and cannot be changed. It is therefore important to understand the impact of the various purchase types on both the purchasing workflow and the resulting inventory.

**Note**

The material type is the type of material, such as a book, electronic journal, or CD-ROM, from which an item takes its form. The material type is part of the item record that is created, but does not control the PO line workflow. The material type can be modified when creating/editing a PO line.

Purchase types can be either physical or electronic and of one of the following continuity types:

- **One-time** – One-time or infrequent orders, such as a printed book, an e-book, or a musical score that is not published repetitively. Physical material is received on the One Time tab on the Receive New Material page. Holdings and items are created automatically, with one holdings being created for each unique location, and one item for each copy. Electronic material goes through the standard activation process and remains activated indefinitely. Once the PO line is invoiced and received/activated, it is closed.

- **Continuous** – Orders that are repeated on a regular basis, for example, monthly subscriptions to physical or electronic material such as journals. Physical material is received on the Continuous tab on the Receive New Material page. Holdings are created upon PO line creation (for each run of the series in a location) and items are created:
  - When using a prediction pattern: After selecting Open predicted item in the MD Editor. See Prediction Patterns.
  - Otherwise: Upon receipt of the issue or bound volume.

Electronic material goes through the standard activation process and may be deactivated during the evaluation process. The PO line remains open once it is invoiced and received/activated (although it can be closed manually).

Additional examples and workflow information:

- A serial for which you will receive items quarterly – The issues are described by the bibliographic record of the journal attached to the order. You must create an item for each issue; they are independent items until they are bound. Issues may or may not circulate, but you will still want to record information about each issue, such as whether it is lost or special in-house rules for certain issues. You should either create a prediction pattern for the delivery of the issues or receive new issues in the Continuous tab on the Receive New Material page.

- A multi-volume monograph for which you will receive volumes at unpredicted intervals, such as encyclopedia volumes – The volumes are described by the bibliographic record of the encyclopedia attached to the order. You must create items for each volume, since volumes may circulate independently. You should receive new volumes in the Continuous tab on the Receive New Material page.
• **License Upgrade** – You can record purchases which reflect the license upgrades purchase model. Additionally, a PO line can be created without a fund and price for the scenario where a License upgrade has no charge and needs to be recorded in the system. The option to set a PO line as no charge is compatible with the following acquisition methods: Purchase, Approval Plan, and Purchase at Vendor System. When selecting any of these values in the Acquisition Method of the PO line, the **No Charge** check box appears. When this check box is selected, the Funding and Pricing sections are hidden.

• **Standing order** – Orders that are not repeated on a frequent or regular basis. Used, for example, for purchasing all the printed books by a particular author when they are published, or where a series of books are being published, but not necessarily on a regular basis. Physical monograph material is not received on the Receive New Material page. Instead, it is created manually by creating or choosing a bibliographic record, creating a holdings record, and then creating an item record, which you associate with the standing order PO line. You set a receipt date for the item in the Physical Item Editor.

---

**Note**

For more information on managing standing orders in Alma, see [Acquisitions - Standing Orders in Alma](#) [PPT].

---

Non-monograph material is processed in the same manner as physical continuous material, although without a fixed sequence or frequency. Electronic material goes through the standard activation process and may be deactivated during the evaluation process. The PO line remains open once it is invoiced and received/activated (although it can be closed manually).

Additional examples and information:

- A monograph series for which you receive new titles at unexpected intervals – Each title may be published by a different author, but all are under the same series, and you are subscribed to the series. The order is linked to a suppressed bibliographic record for the series; items are not described by this bibliographic record. Each item is issued under a different title and should be cataloged separately with its own bibliographic record that is linked to the series order. Each item circulates independently.

- An organization of which you are a member sends you material, such as journal issues, annual directories, and so on – Since you pay for the membership, and not for the subscription, you should create an order with a suppressed record for the membership. The received materials are not described by this record. You might not need to create items for all of the received material, but you might create items for some of them. The PO line type Technical is used for the journal in order to check the issues. The price is left off and the order is associated with the parent PO line – the membership order. If other materials are received regularly, such as an annual directory, use the same logic for them. You can catalog other received one-off materials independently, linked to the membership order.

- A subscription to an integrating resource, such as loose-leaf law materials that are delivered and then added to an existing physical item – The materials are described by the bibliographic record of the physical item attached to the order; each one is an update to this item. You do not have to create new items for each material that is delivered, since they are not circulated independently. If the materials are received in a predictable interval, update the expected receiving date on the order each time the material is received.

The table below presents the recommended purchase types that are available for each type of repository search (see [Manually Creating a PO Line](#) for an explanation of the search and PO line creation process).

<table>
<thead>
<tr>
<th>Repository Search, Recommended Purchase Types, Workflow &amp; Inventory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find</td>
</tr>
<tr>
<td>All Titles</td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>(ISSN)</th>
<th>Print Journal</th>
<th>the PO line is sent</th>
<th>Continuous</th>
<th>An <strong>Activate</strong> task is created when the PO line is sent</th>
<th>Standalone Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>One-time</td>
<td>Received on Receive New Material page</td>
<td>Item type - Journal</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Continuous</td>
<td>Received in Continuous tab on Receive New Material page. Item is created upon receipt.</td>
<td>Holdings</td>
</tr>
<tr>
<td>Book (ISBN)</td>
<td>Electronic Book (Title)</td>
<td>One-time</td>
<td>An <strong>Activate</strong> task is created when the PO line is sent</td>
<td>Standalone Portfolio (E-book)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Continuous</td>
<td>An <strong>Activate</strong> task is created when the PO line is sent</td>
<td>Standalone Portfolio (E-book)</td>
</tr>
<tr>
<td></td>
<td>Print Book</td>
<td>One-time</td>
<td>Received on Receive New Material page</td>
<td>Item type - Book</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Standing Order (monograph; non-monograph acts as continuous)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Material is not received on the Receive New Material page, but rather through a unique workflow. For details, see Receiving Standing Order Monograph Material.</td>
<td>Holdings</td>
<td></td>
</tr>
<tr>
<td>Electronic Collection</td>
<td>Journal Package</td>
<td>Electronic Collection</td>
<td>One-time, Continuous</td>
<td>An <strong>Activate</strong> task is created when the PO line is sent</td>
<td>Electronic Collection (Central Knowledge Base-based)</td>
</tr>
<tr>
<td></td>
<td>Book Package</td>
<td>Electronic Collection</td>
<td>One-time, Continuous</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mixed</td>
<td>Electronic Collection</td>
<td>One-time, Continuous</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service order (without inventory)</td>
<td>Access service</td>
<td>No inventory is created. The PO line workflow depends on the continuity (a renewal is needed for subscription type orders).</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Database service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note**

- Use the Electronic Collection - One-Time/Continuous purchase types. (You can define the **Collection type** as **Database** in the Electronic Collection Editor.)
- These PO line types cannot be the main PO line of inventory, but can be added as additional PO lines to inventory. See Manually Creating a PO Line for more information.
Watch the Purchasing Workflows video series (3 videos).

For information about the PO line types that can be created for each material type and context in Alma, see Enabling/Disabling PO Line Types.

---

**Note**

If you order an item on the title level, it will only display the order link for that item in all title search. If you order an item on the electronic collection level, it will only display the order link for that item on a electronic collection search.
Creating PO Lines

To create PO lines, you must have one of the following roles:

- Purchasing Manager
- Purchasing Operator

Creating a PO line is the first step in the Purchasing Workflow.

You can create a PO line using any of the following methods:

- Importing embedded order data (EOD) in a file: see Importing Records Using an Import Profile
- **Real-Time Ordering** - Vendors can integrate their ordering system with Alma's repository and ordering features. Real-time order data is sent automatically to Alma from the vendor's system using Alma's APIs.
- **Manually Creating a PO Line** - Manually initiate a purchase for a repository item, either with or without also creating new inventory.
- **Creating Service Subscriptions Without Inventory** - Manually create a service subscription.
- **Working With Legal Deposits** - For governments or national libraries that receive copies of publications at no charge from vendors, use legal deposits to create zero-value PO lines.
- As a **Purchase Request**, or in response to purchase request made by a patron in Primo (when enabled, any user can perform this). These may also be created automatically based on certain criteria when a citation is added or edited (by a user with any role that can create a citation). See Configuring Automatic Purchasing Requests from Citations.
- As a **Patron Driven Acquisition** - When a vendor sends e-resources to an institution that may be of interest to the institution. Access is monitored by the vendor; when a predefined threshold is exceeded, the item is considered as if it is purchased and is sent as part of an EOD to Alma.
Real-Time Ordering

Alma provides for real-time ordering by enabling vendors to integrate their ordering system with Alma’s repository and ordering features. Real-time order data is sent automatically to Alma from the vendor’s system using Alma’s APIs. The list of vendors currently supported for orders originating from OASIS is:

<table>
<thead>
<tr>
<th>Provider name</th>
<th>Collection name</th>
<th>Collection ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cambridge University</td>
<td>Cambridge University Press Journals Complete</td>
<td>613680000000000019</td>
</tr>
<tr>
<td>EBSCO</td>
<td>EBSCOhost Ebooks</td>
<td>61111000211069000</td>
</tr>
<tr>
<td>Elsevier</td>
<td>Elsevier ScienceDirect Journals Complete</td>
<td>613840000000000010</td>
</tr>
<tr>
<td>Elsevier</td>
<td>Elsevier ScienceDirect Books Complete</td>
<td>613840000000000009</td>
</tr>
<tr>
<td>Karger</td>
<td>Karger Journals Complete</td>
<td>61110974978799720</td>
</tr>
<tr>
<td>Karger</td>
<td>Karger eBooks Collection</td>
<td>613810000000000333</td>
</tr>
<tr>
<td>ProQuest Ebook Central</td>
<td>EBook Central Perpetual and DDATitles</td>
<td>614330000000000002</td>
</tr>
<tr>
<td>SAGE</td>
<td>SAGE Complete</td>
<td>61111092947545000</td>
</tr>
<tr>
<td>Taylor &amp; Francis</td>
<td>Taylor &amp; Francis eBooks Complete</td>
<td>611000000000000660</td>
</tr>
<tr>
<td>World Scientific Publishing</td>
<td>World Scientific Journals</td>
<td>61110974746497576</td>
</tr>
<tr>
<td>World Scientific Publishing</td>
<td>World Scientific eBooks</td>
<td>612490000000000003</td>
</tr>
</tbody>
</table>

Real-time ordering speeds up the availability of resources, increases the efficiency of integrating records, reduces the drawbacks of manually overlaying or merging records, and enhances data enrichment in Alma.

If you would like a vendor to enable this feature, or if you are a vendor who would like to enable this feature, contact VendorIntegration@exlibrisgroup.com.

The simple setup procedure includes the following steps:

1. Create a metadata template, or ensure that a default metadata template is configured.
2. **Recommended:** Create a New Order API Integration Profile, selecting your record matching and merge preferences.
3. Provide the vendor any necessary Alma information for setup, including libraries, funds, and locations.

For a list of participating vendors and more detailed information about real-time ordering (including workflows and instructions for integrating vendors with Alma), please see the following in the Ex Libris Developer’s Network:

- Real-time overview: [https://developers.exlibrisgroup.com/blog/Real-time-Acquisitions](https://developers.exlibrisgroup.com/blog/Real-time-Acquisitions)
- PO line API, how the bib record is determined: [https://developers.exlibrisgroup.com/blog/Create-PO-line-API-how-the-bibliographic-record-is-determined](https://developers.exlibrisgroup.com/blog/Create-PO-line-API-how-the-bibliographic-record-is-determined)
- Create PO line API: [https://developers.exlibrisgroup.com/alma/apis/acq/POST/gwPcGly021rXkIgBNjmJH6pSL6v0pIP2z](https://developers.exlibrisgroup.com/alma/apis/acq/POST/gwPcGly021rXkIgBNjmJH6pSL6v0pIP2z)
When the New Order API runs, Alma uses the vendor identifier number or the ISBN/ISSN to search and match the incoming order to an existing portfolio in an electronic collection. This functionality is currently available for OASIS.

If a match is found, the PO line is associated to the portfolio as an additional PO line. The access model description, as defined in the Access Model table, is then added to the portfolio's Public Notes field for display in Primo.

If a match is not found in your institution, the Community Zone is searched, using the access provider's collection code. A portfolio is created in your institution with a link to the collection in the Community Zone. The access model is stored in the Access Model field of the PO line for electronic orders and the portfolio's Public Notes field for display in Primo.

In both cases, the access model description is only added to the portfolio's Public Notes field if the Include access model in portfolio public note check box is selected on the New Order API integration profile.
Manually Creating a PO Line

To manually create PO lines, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager

To manually create a PO line (the first step in the Purchasing Workflow) for both physical and electronic resources, search for the resource in the bibliographic record (see Searching in Alma), then create the PO line. For an explanation of the physical and electronic purchase types that can be created from your search results, see Explanation of Purchase Types Workflow and Inventory.

Normally, when you create a purchase order line (PO line) for a physical item or electronic resource, Alma automatically creates new inventory for the purchased resources. Alternatively, you can choose to not create new inventory for the manually created PO line, if for example, you earlier created the inventory manually (see Assign Inventory Manually). You can also manually create a PO line for a service (such as access to a web site or a subscription to a computer program), either with or without adding inventory. A purchase can be for a copy of an item or portfolio, or for an item without holdings that is indexed in the Institution, Community, or Network Zone.

For electronic resources, a new purchase request can be either a main PO line - the first PO line linked to the inventory - or an additional PO line - such as to upgrade the number of users or for new titles in a collection. A main PO line creates inventory for the resource; when you attempt to delete a main PO line, Alma attempts to delete the inventory. Deleting an additional PO line does not affect the inventory.

Note

A single PO line can be the main PO line for only one electronic resources and the additional PO line for one or more other electronic resources.

The procedure for creating a PO line for physical and electronic material is the same, with the exception of specific PO line information that is unique to each material type (noted below).

By default, when creating a PO line (a main PO line, for electronic resources), Alma automatically creates a new inventory item and associates it with the PO line. You can prevent Alma from creating a new inventory item when creating many kinds of PO lines. This is useful where you want to add the inventory later or connect existing inventory to the PO line. For example:

- You have migrated many inventory records and want to create the PO lines for them.
- You want to switch suppliers for a standing order.

For more information about preventing Alma from automatically creating an inventory item when creating a PO line, see the Enhanced Staff Control on PO line Inventory Creation video (2:11 mins).

Note

To add service subscription PO lines without inventory, see Creating Service Subscription PO Lines Without Inventory.

To create a PO line:
• You create PO lines for bibliographic records: something in the repository (a title, an item, a portfolio, and so forth). If the entity is not yet in the repository, you must first create a bibliographic record for it and add it to the repository; see Working with Bibliographic Records.

• You must add an inventory item to the PO line before the PO line can be sent for packaging.

• The **PO line owner** refers to the library creating the PO line, while the **intended locations/access** refers to the library for which the order is being placed.

• Once a PO line is created with a certain purchase type, the workflow and inventory/data implications are fixed and cannot be changed. This is therefore a critical step in the PO line creation process.

• Select to see how to handle one order to a vendor for both physical and electronic material and link them together.docx

1. Search for the title for which you want to create a PO line; see Searching in Alma.

   Note that you may also use Search External Resources (Resources > Cataloging > Search External Resources) to locate a title such as one from OCLC or the Library of Congress (see Search External Resources). From the Search External Resources results list, select **Import** to open the record in the MD Editor. In the MD Editor, select **Create PO Line & Exit** (Ctrl+Alt+O) and the PO Line Owner and Type page opens.

2. Select **Order** in the row actions list to create a main PO line. If the item is an electronic resource and it already has a main PO line attached to it, select **Additional Order** to create an additional PO line, instead. The PO Line Owner and Type page opens.

   ![PO Line Owner and Type Page](image)

   **PO Line Owner and Type Page**

   **Note**

   This is also the page that opens when you select the **Create PO Line & Exit** icon in the MD Editor.

3. Complete the fields on the PO Line Owner and Type page using the explanation of options provided in the table below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Type</td>
<td>Select the <strong>Purchase type</strong> for the PO line. The options at the top of the list are recommended types, which depend on the item you selected to get to this page. Other than for electronic collections and portfolios, all enabled purchase types are available no matter what item you selected in the inventory to get to this page (of course, just because you try to order an item in a particular format doesn't mean that any vendor actually has the item in that format, in which case the vendor will probably reject your order). For an explanation on each type and how an administrator can enable/disable these types, see Enabling/Disabling PO Line Types. Also see Explanation of Purchase Types Workflow and Inventory.</td>
</tr>
<tr>
<td>PO Line Owner</td>
<td>In <strong>PO line owner</strong>, select the library to own the PO line. This may be different from the library/location for which you are</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>ordering the resource (see step 5). This list is defined by a system administrator; see Adding/Editing Institution Libraries. Only options relevant to your scope as a Purchasing Operator/Purchasing Manager appear in the list.</td>
<td></td>
</tr>
</tbody>
</table>

This option appears when the title that you have selected to order has multiple 856 $u entries (URLs) in the bibliographic record, and you have selected an electronic Purchase Type option.

When you select this option, a Portfolios List section appears where you can choose specifically which portfolios to order (from the URLs shown in the Portfolios List section). You may select any or all of the portfolios in the Portfolios List section. The portfolios that you select will be associated with the same PO line. See the series of figures below that show an example bibliographic record with multiple 856 $u entries and ordering multiple portfolios by selecting this option.

For more information about creating multiple portfolios, see the Manual Orders: Create Multiple Portfolios video (5:44 mins).

If you do not select Create multiple portfolios, and there are multiple 856 $u entries in the bibliographic record from which you are ordering, Alma randomly chooses one of the 856 $u entries for which to create a PO line.

Optionally, select a template from which to load the PO line.

Templates are created when you select Save as template when creating a PO line (see the last step in this procedure). For more information, see Working with PO Line Templates.
### Field Description

When Alma is configured to automatically generate barcodes (see [Configuring Barcode Generation](#)) and you select a one-time print **Purchase Type** and a library for **PO Line Owner**, the **Generate Barcode Using Sequence** field appears.

**Note**

This field appears for any physical PO line that creates item inventory. These are types enabled on the PO Line Type mapping table (see [Enabling/Disabling PO Line Types](#)) with **Continuity** = **One-Time** and **Inventory Format** = **Physical**.

Select one of the following for this field:

- A library-level barcode sequence profile selected for PO Line Owner (see [Configuring Barcode Generation](#)). The institution default is taken if there is not a library-level sequence.
- The default institution-level barcode sequence profile.
- No selection

If you selected a sequence, then, after you create the PO line, Alma creates an item with the automatically generated barcode.

**Automatically Generated Barcode for the Item**

**Note**

For orders created with one of the following methods, Alma uses the institution-level default or the library-level default configured for automatic barcode generation depending on the library information identified for the order:

- EOD
- From an API (real-time order)
- Approving a purchase request
- Receive New Items from the continuous order receiving process

### Assign Inventory Manually

Select this field to prevent Alma from automatically creating an inventory item for the new PO line.

This check box does not appear if you are creating a PO line for any standing order (except for **Physical - Standing Order Non Monograph**), any service, or the options **Digital - Non Archiving** or **Physical - Archiving** (both of which imply an order without inventory).

If you prevent Alma from creating an inventory item for the PO line, the PO line is created, but new inventory is not created. To attach inventory to the PO line (after step 7), do not select **Save and Continue** in the last step. Instead, select **Save** and attach the inventory, as follows:

- For electronic orders, edit the **PO line** field of a portfolio in the Electronic Portfolio Editor. For more information, see...
4. Select **Create PO Line**.

If you selected **Assign Inventory Manually**, a confirmation dialog box appears, asking you to confirm that the PO line will be created but inventory will not be created. Select **Confirm** to continue.

The PO Line Summary page appears on the **Summary** tab. The page is slightly different for physical and electronic orders, mostly with regards to fields in the Ordered Items and Vendor Information sections.
The PO Line Summary page header displays basic details about the PO line, including its status, type, and number. If there are any alerts for the PO line, they appear at the top of the page. If the status is Under Evaluation or Under Evaluation (Renewal), the status is selectable. When selected, it displays the associated trial. You can see the complete list of alerts in Configuring Purchasing Review Rules. The creation and update users and dates are displayed when selecting the information icon in the top right corner of the summary box.

5. In the Summary tab, enter the PO line information follows and as required. The table includes the fields for both physical and electronic items.

**Note**

A PO line can be associated with either an item or a holdings record. For details on associating a PO line with a holdings record, see Working with the List of Holdings.

<table>
<thead>
<tr>
<th>Summary Tab Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Section</strong></td>
</tr>
<tr>
<td>Ordered Items (for physical items)</td>
</tr>
<tr>
<td>Section</td>
</tr>
<tr>
<td>---------</td>
</tr>
</tbody>
</table>
| Library/Location | | Select the library location (from a list predefined by an administrator) for which you want to order the specified quantity of the item. This may be different from the PO line owner (see step 3).

To order the item for an additional library location, select Add or press Enter. Select the additional location for which you want to order the item and define the quantity you want to order for the location in the **Number of items to create** field. Repeat this procedure for each library location for which you want to order the item.

**Note**

When selecting a new location, you must first select the library in which the location is situated.

You can create relationships between libraries to enable the libraries to acquire items for each other (see Configuring Fulfillment Services Between Libraries Within an Institution).

| Item Policy | | Defines the conditions under which a request for this item can be fulfilled. For more information, see Updating Item-Level Information. |
| Receiving note | | Add text to indicate to the Receiving Operator the intended location of serial or standing order items in which no inventory items are created.

When migrating PO lines without inventory, this field contains the library/location information for the permanent location of the item.

**Note**

You can enter multiple lines of text for this field, however note these lines appear as one block of text, without line breaks.

<p>| Routing during receiving | | If selected, a confirmation message appears when receiving the PO line, informing the librarian that the order is marked for routing and the librarian must print the list of interested users. For details on receiving physical material, see Receiving Physical Material. |
| Binding during receiving | | If selected, a confirmation message appears when receiving the PO line, informing the librarian that the order is marked for binding and must be sent for binding. For details on receiving physical material, see Receiving Physical Material. Also see Binding (Merging) Items. |
| Ordered Items (for electronic items) | eResource | The electronic resource to which the PO Line is linked as a main PO line. |</p>
<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>License</td>
<td>Select a license</td>
<td>Select a license from the quick pick list to associate with the resource, displayed in the inventory list. For more information on licenses, see Managing Licenses and Amendments.</td>
</tr>
<tr>
<td>Vendor Information</td>
<td>Material supplier (required)</td>
<td>The vendor supplying the material being ordered; select from the quick pick list.</td>
</tr>
<tr>
<td></td>
<td>Access provider</td>
<td>The vendor interface of the material being ordered; select from the quick pick list. See Editing Vendor Interface Information.</td>
</tr>
<tr>
<td></td>
<td>Claiming grace period (days)</td>
<td>A grace period (in days) after the expected receipt/activation date, after which the PO line is sent to the claims task list (see Processing Claims). The default value is taken from the Claiming grace period field on the Vendor Account Details page (Acquisitions &gt; Acquisitions Infrastructure &gt; Vendors) for one-time PO lines, and from the Subscription grace period field on the Vendor Account Details page for continuous PO lines.</td>
</tr>
<tr>
<td></td>
<td>Expected receipt/</td>
<td>Either select the number of days after ordering that you expect physical orders to be received or electronic orders to be activated, or select the expected receipt/activation date from the Calendar pop-up. This value is used to calculate the claim date (see Processing Claims). The default value appearing for the Expected receipt/activation after ordering (days) field is taken from the Vendor Account Details page (see Adding a Vendor and Vendor Account ).</td>
</tr>
<tr>
<td></td>
<td>activation after ordering</td>
<td>(days)</td>
</tr>
<tr>
<td></td>
<td>or Expected receipt/activation date</td>
<td></td>
</tr>
</tbody>
</table>

**Note**

When migrating PO lines without inventory, use this section to create new inventory.

To attach existing inventory, see step 6 above.

This field does not appear when creating PO lines without inventory.

When a value is entered in this field, the `c.uresolver.getit2.item_list..ACQ.with_expected_date` label is invoked in the Primo Get It tab and appears as `On order until <date>`. When no value is entered in this field, the `c.uresolver.getit2.item_list..ACQ.with_no_expected_date` label is invoked in the Primo Get It tab and appears as `On Order`.

You can customize the values that appear by using the Discovery Interface Labels Code Table page (see Configuring Labels).
<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Activation after ordering (days)</strong> field is ignored.</td>
<td>To invoke the labels for continuous orders, create a holdings record with a prediction pattern. See Prediction Patterns.</td>
</tr>
<tr>
<td></td>
<td><strong>E-Activation due after ordering (for electronic items only)</strong></td>
<td>The number of days after ordering that the activation task is due. When the due date passes, the Notify E-Activation Due letter (letter code: EactivationtaskOverdueLetter) is sent to the user that is assigned the e-resource activation task and an alert is displayed in the user’s list of tasks. For information on creating a default due date, see Configuring Other Settings. For more information, see Managing Electronic Resource Activation. For more information, see the Due Date Added to Activation Tasks List video (6:35 mins).</td>
</tr>
<tr>
<td></td>
<td><strong>Subscription interval (for continuous physical items only)</strong></td>
<td>When prediction patterns are not in use, the receipt interval, in days, of the continuous order (such as 30 for monthly, 90 for quarterly, and so forth.) When prediction patterns are in use, the estimated number of days after the issue date that the issue arrives in the library. If the issue arrives in the library before the issue date, enter 0. This value is used to calculate the claim date (see Processing Claims). For information on handling items with different receiving intervals, see the explanation for the Technical acquisition method in the table below (Acquisition Methods).</td>
</tr>
<tr>
<td></td>
<td><strong>Reclaim Interval (days)</strong></td>
<td>When populated, Alma will send reclaim letters at the defined interval after the initial claim letter is sent. If the field is not populated, a reclaim letter will not be sent. When this field is populated on the Vendor Account Details page it is copied to the corresponding field in the PO line page when the specific vendor account is selected, any change on the Reclaim Interval (days) field in the PO line details page will take effect and will be the actual value.</td>
</tr>
<tr>
<td></td>
<td><strong>List price (required)</strong></td>
<td>The list price for a single copy of the item, and select the currency from the field to the right of this field. For values less than 1, enter a leading 0. For example, 0.44, not .44.</td>
</tr>
<tr>
<td>Pricing</td>
<td><strong>Discount (%)</strong></td>
<td>The discount, if any, to be applied. Alma automatically calculates the total price for the PO line based on the list price for each copy, the discount, and the number of copies being ordered. The total price of the PO line is displayed in the Net price field. This value is pre-filled if the vendor has a defined Account discount percent. See Adding a Vendor and Vendor Account.</td>
</tr>
<tr>
<td>Section</td>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Funding**  | Quantity for pricing                | The number of items to be paid for. Indicate a number between 1 and 100. The total price for the PO line equals the quantity for pricing multiplied by the list price.                                                                                              Note that the **Quantity for pricing** and the **Number of items to create** (for physical items) may be different if you have obtained discounted pricing through a deal such as “buy two items and get a third item at no additional charge”.
Note
Learn more about this feature in the [PO Line Pricing for Multiple Items](#) video (2:27 mins).
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Amount Paid in Current FP</td>
<td>The total amount paid so far during the current fiscal period. This field appears only when viewing or editing the PO line after it was created, and only for subscription orders. It is a calculated value at the time of editing and is therefore not searchable.</td>
</tr>
</tbody>
</table>
|              | Fund (required)                     | The fund; select **Add Row** to select from the quick pick list and enter the other values.                                                                                             While the default option is one fund with 100 percent allocation, you can distribute the cost of a PO line among several funds. To add a fund to the list, select the fund, stipulate the percentage of the cost to be covered by the fund, and select **Add Fund** or press **Enter**. The funds are displayed as links in the **Fund Name** column and can be selected to open transactions related to the PO line for that fund. Note
A fund is available for a PO line if it serves the library of the PO line owner, is active, allocated, and is covered by the current fiscal period, or if fund rules allow encumbrance outside of the fiscal period. The fund may not necessarily have money in its balance at the time of ordering. When the PO line is saved, an encumbrance transaction is created. If an amount other than 100% is allocated to funds, select **Redistribute Lines** to re-allocate the fund amount percentages, based on each fund’s respective amount. |
<p>|              | Percent                             | The percentage of the <strong>List price</strong> value still available for fund allocation. When the <strong>Amount</strong> field is updated, the value of this field updates accordingly.                                                                                                                                                                                                                                 |
|              | Amount                              | The amount of the <strong>List price</strong> value still available for fund allocation. When the <strong>Percent</strong> value is updated, the value of this field updates accordingly.                                                                                                                                                                                                                       |
|              | Acquisition method                  | The type of acquisition method for the PO line. For details on the available acquisition methods, see the following table (<a href="#">Acquisition Methods</a>). To enable or disable methods, or to configure the default method, see <a href="#">Configuring Acquisition Methods</a>.                                                                                                                                                                                                                       |
|              | Material type                       | The type of material—such as book, electronic journal, or CD-ROM—that the item represents. The available options differ depending on whether the item is physical or electronic. For information on customizing material type labels, see <a href="#">Configuring Physical Item Material Type Descriptions</a>. When the material type in a PO line is updated, all items are updated with the material type. This field does not appear when creating PO lines without inventory. |</p>
<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No Charge</td>
<td>If you need to create a PO line without any charge, but the Acquisition method, such as License Upgrade, still requires one, this check box appears. When selected, the Funding and Pricing sections are hidden. When the PO line is saved with the check box selected, any ENC transactions on the PO line are deleted, or the transactions will not be created for new orders. The field is visible when the PO line has any of the following acquisition methods: License Upgrade, Purchase, Approval Plan, or Purchase at Vendor System.</td>
</tr>
</tbody>
</table>
|         | Invoice Status | This field is set by default to No Invoice and should not be modified. Alma automatically updates this field as required. When an invoice arrives and the invoice line is associated with the PO line:  
  ◦ If the PO line is a one-time PO line, the invoice status is set by default to Fully Invoiced, assuming that this is the only invoice for the PO line. However, you can modify the invoice line status using the Fully invoiced field in the Add Invoice Line dialog box (see Add Invoice Line Dialog Box Fields) and thereby modify the PO line invoice status.  
  ◦ When an EDI invoice is loaded, if the total number of items in an invoice line (added to the number of items in all previously linked invoices to this PO line) is less than the number of items in the associated PO line, the PO line is marked Partially Invoiced.  
  ◦ If the PO line is continuous, the invoice status is always Partially Invoiced because it is assumed that invoices are received periodically and the continuous PO line is never fully invoiced.  
  This impacts the PO line workflow as follows: If a one-time PO line is set to Fully Invoiced and items are received/activated, the PO line is closed. If the PO line is set to Partially Invoiced, it remains in the Waiting for Invoice Status until it is changed (manually or by receiving a new invoice) to Fully Invoiced.  
  The invoice status is set to Fully Invoiced when the ordered items is equal to or less than the invoiced items in all related invoice lines.  
  When an invoice/invoice line is deleted, or a PO line is removed from the invoice line, Alma checks if the PO line has another invoice line related to it and the PO line status. If the status is active and there are no more related invoice lines, the invoice status is set to No Invoice. |
|         | Reporting code | Additional classifications of fund attributes. To configure these codes, see Configuring Reporting Codes. |
|         |        | Note
Deleting an invoice removes the expenditure and recalculates the disencumbrance. To remove the disencumbrance (when removing the only invoice associated with the PO line), manually set the PO line's Invoice Status to Partially Invoiced. See Creating an Invoice From a PO or Manually. |
<p>|         | Rush     | Whether you want to rush the order of this item. The rush icon |</p>
<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Manual packaging</td>
<td>Whether to enable manual packaging of the PO line into a PO. For details on packaging PO lines, see Packaging PO Lines into a PO</td>
</tr>
<tr>
<td></td>
<td>Cancellation restriction</td>
<td>Whether to display a cancellation restriction note containing a warning upon the cancellation of a PO line. (To then continue with the cancellation of the PO line, the user must select Confirm.) The Cancellation Restriction icon appears next to the relevant items on the PO line details pages.</td>
</tr>
<tr>
<td></td>
<td>Cancellation restriction note</td>
<td>The text of the warning to be displayed when canceling a PO line.</td>
</tr>
<tr>
<td></td>
<td>Identifier</td>
<td>The ISBN/ISSN of the item to be ordered. By default, this field is populated by the first identifier listed in the bibliographic/imported record’s ISBN/ISSN (020/022) field. You can select a different value. If the ISBN number is 13 digits and the display_isbn_13_in_predefined_result parameter is enabled, all 13 digits are displayed. If the parameter is disabled, the identifier will display 10 digits. See Configuring Other Settings.</td>
</tr>
<tr>
<td></td>
<td>Proposed Identifier</td>
<td>An identifier indicating which ISBN/ISSN of the item to order.</td>
</tr>
<tr>
<td></td>
<td>Vendor reference number</td>
<td>A reference number for the PO line in Alma, as provided by the vendor. Serves as a matching point for identifying a PO line in Alma. When communicating with an EDI vendor, the SLI field is the Vendor reference number matching point. The LI field is the matching point for the PO line reference number. This field is also used as a matching point for Update Inventory import profiles.</td>
</tr>
<tr>
<td></td>
<td>Vendor reference number type</td>
<td>The types of vendor reference number. The available options are predefined by Ex Libris.</td>
</tr>
<tr>
<td></td>
<td>Note to vendor</td>
<td>Any notes for the vendor. Notes entered in this field are moved to the Notes tab when the PO line is saved.</td>
</tr>
<tr>
<td></td>
<td>Vendor invoice number</td>
<td>Appears when the PO line was uploaded from an EOD file. See Importing Records Using an Import Profile.</td>
</tr>
<tr>
<td>Renewal</td>
<td>For more information, see Editing PO Line Information – Renewals.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Additional (this section appears collapsed by default)</td>
<td>A target PO line, or select Find to the right of the field to select a PO line from a displayed list.</td>
</tr>
</tbody>
</table>

**Note**

When canceling a PO line, a warning message appears if the line has associated PO lines. The relationship in this field is a one-way relationship: this PO line is associated to the
### Section

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source type</td>
<td>The source from which the current PO line originated. For imported lines, select the link to open the relevant page containing the source details; for example, the <a href="#">MARC Record Simple View</a> page, or the <a href="#">Import Job Details</a> page.</td>
</tr>
<tr>
<td>Additional PO line reference</td>
<td>The reference code by which you want to identify the current PO line. <strong>Note:</strong> Additional here refers to the reference; this field has nothing to do with whether the PO line is a main PO line or an additional PO line.</td>
</tr>
</tbody>
</table>

#### Acquisition Methods

<table>
<thead>
<tr>
<th>Acquisition Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval Plan</td>
<td>An agreement is in place that the vendor sends whatever the vendor determines is necessary to the institution, in EOD format. Such PO lines are not sent to the vendor, but they are packaged into POs and marked as sent until they are received/activated. Pricing and fund information is mandatory for this method. The behavior of this method is identical to that of the <a href="#">Purchase at Vendor System</a> method, with the exception of its display in a report.</td>
</tr>
</tbody>
</table>
| Depository         | The institution agrees to host government publications and make them freely available.  
  ◦ The behavior of this method is identical to that of the [Exchange](#), [Gift](#), and [Technical](#) methods, with the exception of its display in a report. (Such PO lines are not sent to the vendor, but they are packaged into POs and marked as sent until they are received/activated.)  
  ◦ Pricing and fund information are not mandatory for this method.  
  ◦ The **Material supplier** value can be a governmental organization. |
| Exchange            | The institution agrees to exchange resources with another institution.  
  ◦ The behavior of this method is identical to that of the [Depository](#), [Gift](#), and [Technical](#) methods, with the exception of its display in a report. (Such PO lines are not sent to the vendor, but they are packaged into POs and marked as sent until they are received/activated.)  
  ◦ Pricing and fund information are not mandatory for this method.  
  ◦ The **Material supplier** value can be another library. |
<table>
<thead>
<tr>
<th>Acquisition Method</th>
<th>Description</th>
</tr>
</thead>
</table>
| Gift               | The resource is granted as a gift from the vendor to the institution.  
  ◦ The behavior of this method is identical to that of the Depository, Exchange, and Technical methods, with the exception of its display in a report. (Such PO lines are not sent to the vendor, but they are packaged into POs and marked as sent until they are received/activated.)  
  ◦ Pricing and fund information are not mandatory for this method.  
  ◦ The Material supplier value can be a private individual or a non-commercial organization. |
| Legal Deposit      | Legal Deposits allow a zero value for a PO to coexist with a notification to the vendor, requiring neither funds nor a price to send out different versions of the PO line order letter. See Working With Legal Deposits. |
| Purchase           | The institution purchases the resource and, when the PO is approved, sends the order and renewals to the vendor by EDI or email.  
  For details on managing vendors and vendor accounts, see Managing Vendors.  
  If the parameter **po_line_send_notification_to_vendor_on_renewal** is set to **true** on the Mapping Table page for Other Settings (in Acquisitions Configuration), notification is sent to a vendor when a subscription is renewed (see Configuring Other Settings). |
| Purchase at Vendor System | A purchase is handled using an external vendor system. Such PO lines are not sent to the vendor, but they are packaged into POs and marked as sent until they are received/activated. Pricing and fund information is mandatory for this method.  
  The behavior of this method is identical to that of the Approval Plan method, with the exception of its display in a report. |
| Technical          | Relevant for service subscription orders without inventory or items that have migrated from an external system. Often used for multi-part orders where you pay once and receive multiple resources.  
  If you are ordering multi-part serials, it is recommended that you have one, main PO line (with fund information) for the subscription and an additional Technical PO line for each item that you are to receive at a different interval. You then associate each Technical PO line with the main PO line.  
  If you are working with a mixed print and electronic order, it is recommended that you have one, main PO line (with fund information) for the electronic inventory and an additional Technical PO line for the printed material (so that you can receive this material). You then associate the Technical PO line with the main PO line.  
  ◦ The behavior of this method is identical to that of the Depository, Exchange, and Gift methods, with the exception of its display in a report.  
  ◦ Pricing and fund information are not mandatory for this method. |

6. In the **Description** tab, modify the fields as required. All fields (except **Identifier Type**) are free text and for informational purposes only.
Note

The PO line description is an entity that is created at the time of the PO line creation and is not connected to, or influenced by, the bibliographic information of the related record. This means, for example, that if a PO line is created for a title *Introduction to Chemistry*, the PO line description title will be *Introduction to Chemistry*. If, at a later point in time, the title changes to *Introduction to Organic Chemistry*, the PO line description title will not automatically change. If you want to have the PO line description title updated as a result of a changed bibliographic record title, you may do so using the PO line's Change Bib Reference link or selecting the Reload Bib Data button.

- For Access Service Subscription, Database Service One Time, Digital Non Archiving, Other Service One Time, Other Service Subscription, and Physical Archiving orders, the only field is **Description**.
- For Electronic Book One Time, Electronic Book Standing Order, Electronic Book Subscription, Electronic Title One Time, Electronic Title Standing Order, Map, Musical Score, Physical One Time, Physical Standing Order Monograph, Physical Standing Order Non Monograph, Print Book One Time, and Print Book Standing Order orders, the fields are:
  - Title
  - Author
  - Identifier
  - Publication Place
  - Publication Date
  - Series
  - Binding
  - Vendor's Title Number
  - Identifier Type
  - Publisher
  - Edition
  - Volume/Part/Number
  - Language
- For Electronic Journal One Time, Electronic Journal Subscription, Print Journal Subscription, Print Journal One Time, Physical Subscription, and Electronic Title Subscription orders, the fields are:
  - Title
  - Identifier
  - Vendor's Title Number
  - Publisher
  - Frequency
  - Language
  - Identifier Type
  - Publication Place
  - Publication Date
- Start/End
- For Microform and Mixed Material orders, the fields are:
  - Title
  - Author
  - Identifier
  - Publication Place
  - Publication Date
  - Series
  - Vendor's Title Number
  - Identifier Type
  - Publisher
  - Language
  - Volume/Part/Number
- For Electronic Collection One Time and Electronic Collection Subscription orders, the fields are:
  - Title
  - Vendor's Title Number
  - Publisher
  - Language
  - Publication Place
  - Publication Date
- For Manuscript orders, the fields are:
  - Title
  - Vendor's Title Number
  - Identifier
  - Publication Place
  - Publication Date
  - Author
  - Identifier Type
  - Publisher
  - Language
- For Physical Computer File One Time, Physical Computer File Subscription, Remote Computer File One Time, Remote Computer File Subscription, and Visual Material orders, the fields are:
  - Title
  - Author
  - Identifier
  - Publication Place
  - Publication Date
  - Series
7. In the **Alerts** tab, view the alerts that were generated for the PO line.

![Example of Alerts](image)

The following is a list of the most common alerts generated by Alma. You can see the complete list of alerts in Configuring Purchasing Review Rules.

- **Waiting for Renewal** – This alert is generated when the calculated **Renewal date** for an automatic renewal is later than the **Subscription to date**. The PO line for the renewal appears in the Waiting for Renewal task list with this alert.
- **There is an active, duplicated order # for this ordered resource** – This alert is generated when there is a duplicated order for the resource.
- **Mandatory information is missing or erroneous** – If mandatory information is missing or is erroneous, select **Edit** in the row actions list to complete or correct the information.
- **Order already exists in the inventory** – If the ordered resource already exists in your inventory, you can view the items in your inventory that match the ordered item.
- **Overdue PO line** – The PO line has not been received/activated within the expected number of days after placing the order or by the expected receipt/activation date (see Processing Claims).
- **Open claims exist for this PO line** – The PO line has been sent to the claims task list (see Processing Claims).

8. In the **Invoice Lines** tab, view, add, or edit any invoice lines associated with the PO line. For information on invoice lines, see Creating an Invoice From a PO or Manually.

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**Note**

- The available options depend on your privileges.
- A PO line may be associated with many invoice lines, but an invoice line may not be associated with more than one PO line.

9. In the **Associated PO Lines** tab, you can view the PO lines that are associated to the current PO line.

PO lines appearing in this tab were:
Associated automatically to this PO line by Alma.

Manually associated to the current PO line in the Associated PO line field in the Additional section of the Summary tab of the other PO line.

**Note**

If the current PO line is associated to a target PO line (which is the reverse of the relationship of the PO lines appearing on this tab), the target PO line appears in the Associated PO Lines field in the Additional section of the Summary tab of this PO line.

The filter on this tab is for the Association Type column; the filter can have one of the following values:

- **All** - Display all associated PO lines.
- **Same title** - Display PO lines associated to resources with the same title as the resource as this PO line.
- **Same Inventory Resource** - Display PO lines associated with the same item (or portfolio or representation) as this PO line.
- **User defined relation** - Display PO lines manually associated to this PO line by a user.

10. In the Communications tab, start a new communication with the vendor or, if a communication already exists, you can enter details of the reply from the vendor and/or follow up on the communication with your reply to the vendor. For details on this tab, see Communicating with Vendors.

11. In the Interested Users tab, you manage users interested in the acquisition. Interested users are always notified about changes in the PO line. You can also select that an interested user is notified when the item is received, activated, or renewed, canceled, and/or that a hold is placed on the item for the user. The notification is sent with the Interested In letter (letter code: InterestedInLetter). The requester for the purchase request is automatically defined as an interested user.

To add an interested user, search for the user, select Add interested users, optionally select any of the following options (when available), and select Add User. The user is added as an interested user.

**Note**

- The interested users tab appears only in PO lines that have inventory. PO line types defined with a material type of Generic in the PO line type mapping table will not have an interested users tab. For information on the PO line type mapping table, see Enabling/Disabling PO Line Types.
- You can delete interested users on closed and canceled PO lines by using the po_line_remove_interested_users parameter (see Configuring Other Settings (Acquisitions)). When the weekly PO Line - Delete interested users system job runs, all applicable interested users are removed (see Viewing Scheduled Jobs).

- **Notify user upon receiving/activation** – When selected, Alma sends an email to the user when the item arrives...
at the library’s receiving department. An email is sent only if this is selected and an email address is configured for the user.

- **Hold item** – This option appears only when working with physical items. When selected, Alma creates a hold request on the item for the user. If you select this option for more than one user, Alma randomly selects only one of the users and creates a hold request for this user. The hold request is created only during receiving (when selecting **Receive**), even if the item is kept in the department.

- **Notify upon renewal** – This option appears only for continuous orders. When selected, Alma sends the Notify Upon Renewal letter (letter code: NotifyUponRenewalLetter) to the user when the order is sent to manual renewal. An email is sent only if this is selected and an email address is configured for the user.

- **Notify upon cancelation** - When selected, Alma sends an email to the user when the order is canceled. An email is sent only if this is selected and an email address is configured for the user.

The item’s request date is the same as the order date. If other requests exist for the item, request priority is handled according to role, as configured by the institution. The pickup location is the circulation desk of the item’s location, as specified in the PO line.

12. In the **History** tab, view the audit trail of changes performed to the PO line. These include changes in status, price, and fund distribution. For details, see **History Tab**.

Changes to a fund, price, fund percentage, or anything else that affects the transaction (encumbrance, expenditure, disencumbrance) appear with the value **Transaction Item** in the **Field Name** column. This may be the result of a system process, such as a rollover.

13. In the **Notes** tab, add, update, or delete notes for the PO line. For details, see **Notes Tab**.

14. In the **Attachments** tab, add, update, or delete attachments for the PO line. For details, see **Attachments Tab**.

15. After you enter the PO line information, select one of the following from the top actions. If you save the PO line and the ordered item’s record is brief, you may receive a warning and a confirmation dialog box. See **Working with Brief Record Levels** for more information about brief records.

- **Save and continue** – The information you entered is saved and the PO line continues to the following stage of the workflow (review rules are not checked). For more information on the purchasing workflow, see **Purchasing Workflow**. If there are any alerts for the PO line, they appear in a confirmation dialog box. You can see the complete list of alerts in **Configuring Purchasing Review Rules**.

  If you selected **Assign Inventory Manually** when you started this process, select **Save** to store the PO line, attach the inventory to the PO line, re-edit the PO line, ensure that all remaining fields are complete and correct, and then select **Save and continue**.

- **Save** – The information you entered is saved, and the PO line remains in its current workflow stage (if you just created the PO line manually, it remains **In Review**). Use this option if you are assigning inventory manually, if you are unsure if you want the PO line to continue to the following stage of the purchasing workflow, or if you are editing PO lines from the Claims page.

  If you are editing PO lines from the Claims page, select **Save** to store the information you modified.

- **Save and Request Evaluation** – The information you entered is saved and a trial is requested. Use this option if the PO line is assigned to you but you do not have the Trial Operator/Trial Manager role. The PO line’s status changes to **Under Evaluation** and moves to the Manage Trials page with the status **Requested**, where the Trial Operator/Trial Manager can access it and continue with step 3 in the evaluation workflow. This option is available only for electronic PO lines that create inventory.

- **Save and Start Trial** – The information you entered is saved and a trial is started. Use this option if you have the
Trial Operator/Trial Manager role, the PO line is assigned to you, and you want to start the trial. The PO line’s status changes to **Under Evaluation** and the Trial Details page opens (continue with the evaluation workflow at step 3). This option is available only for electronic PO lines that create inventory.

- **Order now** – Enables you to process an order for a PO line, which moves the PO line to the purchasing workflow where it is normalized and validated before being packaged (step 4 in the Purchasing workflow) and sent. For more information on packaging PO lines, see [Packaging PO Lines into a PO](#). If you select **Order Now**, an Order Now letter (letter code: OrderNowLetter) is sent after the order is sent for processing. The vendor receives the order using the Order List letter (letter code: OrderListLetter). For information on these letters, see [Configuring Alma Letters](#).

- **Cancel line** – The PO line is canceled (see [Canceling PO Lines](#)).

- **Defer** – The PO line is deferred and appears in the Review Deferred task list until it is either reactivated (moved back to step 2 of the regular purchasing workflow) or canceled. For more information on deferring PO lines, see [Deferring PO Lines](#).

- **Integrate with OASIS** - For a PO line that has OASIS in the **Material Supplier** field, you can select this button to automatically send the order to OASIS. See [Check Availability and Pricing](#).

- **Relink** – Changes the bibliographic record to which the PO line is linked (see [Relinking PO Lines](#)).

- **Delete** – Deletes the PO line (see [Deleting PO Lines](#)).

- **Change Bib Reference** – Changes the bibliographic record of the PO line. See [Changing Bibliographic Reference](#).

- **Save as template** —The entered field values are saved as part of a template. See [Working with PO Line Templates](#).

---

### Working with PO Line Templates

PO line templates are saved sets of PO line configurations that you can apply to a new PO line. This saves you time when creating the PO line, since you don’t have to enter these configurations each time. When saving a template, you can choose to delete an existing template (if you are the creator of the template). Templates can be saved as either public or private. When loading templates, you can choose from your private templates and all public templates.

The following fields on the PO Line Summary Tab page are saved as part of a template:

- **Ordered Items section:**
  - Number of items to add (Physical items)
  - Library/Location (Physical items)
  - License (Electronic items)
  - Item policy (Physical items)
  - Receiving Note (Physical items)

- **Vendor Information section:**
  - Material supplier (Physical and Electronic items)
  - Or expected receipt date (Physical items)
  - Expected activation after ordering (days) (Electronic items)
  - Or expected activation date (Electronic items)

- **Pricing section:**
To add or edit a PO line template:

1. Follow the procedure for manually creating a PO line (see above; to edit a template, select a template in the Load From Template field, as described in step 6). Enter (or edit) the relevant fields.

2. When saving the PO line, select Save as template. The Save as Template pop-up window appears.

3. Enter a template name. To replace an existing template, select the current template in Existing Template. Note that the template name should not include a semicolon, comma, or slash (otherwise, it cannot be properly retrieved later).

4. Select Save. If you are replacing an existing template, select Confirm in the confirmation dialog box. The template is saved. Note that a PO line is NOT created in this case.

Note

A public template can be used by everyone, but only the template owner or an Acquisitions Administrator can edit or delete the template.
Communicating with Vendors

To communicate with vendors, you must have one of the following roles:

• Purchasing Operator
• Purchasing Manager
• Vendor Manager

You can communicate with the vendor on the **Communications** tab of the PO Line Details page. Communication can consist of any of the following:

• Sending a new email to the vendor
• Entering a response from the vendor
• Sending a reply to the vendor

Communication with the vendor from this tab are sent by email. You must manually enter all responses from the vendor, including those received by email.

When working with claims, Alma automatically sends an email notification message to the vendor if all of the following conditions are met:

• The **auto_claim** parameter (for one-time physical PO lines) or the **auto_claim_co** parameter (for continuous physical PO lines) is set to **Y** (see Configuring Other Settings).
• The email PO Line Claims letter is enabled (see Enabling/Disabling Letters).
• The vendor’s email address is configured.
• One day has elapsed since the Expected Receipt Date + Claiming grace period of a PO line (see Processing Claims) and the material has not been delivered by the vendor.

**Note**

• As long as the above conditions are met, a message is automatically sent to the vendor for physical PO lines. Messages may be sent to a vendor multiple times for a single item. For more information, see Processing Claims.

• If the vendor is configured for EDI claims (see Electronic Data Interchange (EDI)) and the EDI PO Line Claims letter is enabled, automatic claims are sent using EDI for all PO line types (see Processing Claims) as long as the above conditions are met. Claims sent using EDI do not appear in this tab. Responses to claims that are received from vendors using EDI appear in the **Notes** tab.

• When manually sending a claim from this tab, the claim is sent by email regardless of whether the vendor is configured for EDI claims.

• When a claim notification is sent to the vendor by email, if the organization unit (owning library) has a **Claim Response** email type, this email is used in the claim notification email’s **From** address. To use the **From address** in the PO Line Claim Letter (letter code: POLineClaimLetter), and not the library’s email address, remove the Claim response email type from the organization emails (see Configuring Institution/Library Contact Information) and edit the email addresses under **Contact Information**, clearing the **Claim response** email type. For information on configuring the letter, see Configuring Alma Letters.

• When a purchase order is sent to the vendor by email, if the organization unit (owning library) has an **Order Response** email type, this email is used in the email’s **From** address.

If the custom parameter is not set to **Automatic**, you can, if required, manually send an email to the vendor.
Sending Emails to Vendors

The following procedure describes how to communicate with a vendor by email.

To send an email to a vendor:

1. Search for and edit a PO line.
2. In the Communications tab of the PO Line Details page, select one of the following options:

   ◦ Start Communication in the top actions list — Start a new communication with the vendor. The Start Communication dialog box appears. This option is available only when a vendor is specified on the Summary tab of the PO Line Summary page.
   ◦ Reply in a row actions list — Reply to a communication from the vendor. The Reply dialog box appears.

3. The body of the letter is automatically populated with information concerning the PO line. Select Claim as the Type to add the last item received details to the letter. Claim also sends the letter using the vendor’s claim address. All other communication types use the vendor’s preferred email address. For a video demonstrating PO line information in the letter to the vendor, see the PO Line Info in Communication to Vendor video (3:40 mins).
4. In the Subject field, it is recommended to enter the PO number and/or PO line number. While any text can be entered, a subject that includes the PO number and/or the PO line number makes communication with the vendor clearer.
5. In the Body field, enter the text of the email. This field is also pre-populated with the following fields, when available:
   ◦ Order Line Reference Number
   ◦ Title
6. If you are sending an attachment with the email, select the file name.

7. Optionally add a relevant URL and any notes (to be included in the attachment, not in the letter XML).

8. Select Send. The email is sent to the vendor and appears in the list of communications.

To view the messages associated with a communication, select the relevant entry in the Subject column. The Messages tab appears, with the correspondence that was sent to the vendor.

The letter sent to the vendor is based on the Conversation Letter (letter code: ConversationLetter). The letter uses the preferred email of the vendor. If no preferred email is available, the Order email is used. To customize this letter, see Configuring Alma Letters.

To delete a conversation and all of its replies, select in the row actions list.

**Entering Vendor Responses to Emails**

Vendor responses to communications are not automatically recorded in the Communications tab and must be entered manually. The following procedure describes how to enter vendor responses to emails.

**To enter vendor responses:**

1. In the Communications tab, select one of the following options:
   ○ Select the email to which you want to enter a response. The text of the sent email appears in the Messages tab. Select Add a Response.
   ○ Select Add a Response in the row actions list.

   The Add a Response pop-up window opens.
2. In the **Body** text box, enter the response from the vendor.

3. If you received an attachment with the email, save it to a file and then select the file name of the response.

4. Optionally add any relevant URL and notes.

5. Select **Response**. The email response from the vendor is saved to Alma.

   Select the **Attachments** tab to view details of the attachments associated with a communication. You can also add new attachments from this page by configuring information in the displayed fields and selecting **Add Attachment**.

   To view an attachment in the **Attachments** tab, select **Download** in the row list actions.
Creating Service Subscription PO Lines Without Inventory

A service subscription (a purchase type) PO line (the first step in the Purchasing Workflow) does not create inventory. If required, these PO lines can be added as additional PO lines to inventory. A service subscription is used to create an order which is not associated to a resource (item) but is set to cover a certain fee for an outstanding service provided by the vendor which does not specifically relate to a physical or electronic resource.

To create a service subscription PO line without inventory:

1. On the Order Without Inventory page (Acquisitions > Purchase Order Lines > Order Without Inventory), configure the following:

   1. Enter a heading for the PO line in the Order heading field. For example, "US Civil War", or "New York Times Website Access".
   2. Enter an alternative heading for the PO line in the Alternative heading field.
   3. Enter a description for the PO line in the Description field.
   4. Configure the remaining fields, as described in steps 3 through step 6 in Manually Creating a PO Line.

2. Select Create PO Line. The PO Line Summary page appears.
The PO Line Details page header displays details of the PO line, its PO line type, the library for which the item is being ordered, and the order and line numbers. You can edit the basic description information on the Description tab.

The page is the same as for regular PO lines, but without the Ordered Items section. For details on the PO Line Details page tabs, see step 10 through step 20 in Manually Creating a PO Line
Working With Legal Deposits

If you are a government or national library that receives copies of publications at no charge from vendors, you can use the Legal Deposit acquisition method to carry out transactions with vendors. Legal Deposits allow a zero value for a PO to coexist with a notification to the vendor, requiring neither funds nor a price to send out different versions of the PO line order letter.

The Legal Deposit method is delivered with Alma and enabled for institutions that require it. When a new PO line is created, Alma checks if Legal Deposits are enabled. If so, Alma displays the acquisition method as an option.

How It Works

Libraries receive one or more copies of every item published within their jurisdiction. (This includes monographs and serials, print and electronic.) Libraries can claim a zero purchase price and, in the same transaction, send an acknowledgment of receipt to vendors or publishers. Acknowledgments are system-generated with the following rules:

- For each item (for monographs)
- According to event (claim, order, receipt).

Note

Claims letters are not sent automatically for continuous order items (serials).

Alma delivers the following Legal Deposit notification letters that can be customized:

- Legal Deposit Annual Receipts Letter (letter code: LegalDepositAnnualReceiptsLetter)
- Legal Deposit Claim Letter (letter code: LegalDepositClaimLetter)
- Legal Deposit Order Letter (letter code: LegalDepositOrderLetter)
- Legal Deposit Receipt Letter (letter code: LegalDepositReceiptLetter)

For detailed information about editing form letters in Alma, see Configuring Alma Letters.

Once the Legal Deposit method has been enabled and the letters reviewed and edited, you can create a PO line with the Acquisition method of Legal Deposit. See Manually Creating a PO Line.

Legal Deposit Workflow

1. An administrator enables Legal Deposit as an acquisition method for the institution. See Configuring Acquisition Methods.
2. The user creates a PO line with an acquisition method of Legal Deposit. See Manually Creating a PO Line.
3. Alma sends a request notification to the vendor.
4. When the operator creates an order using the Legal Deposit acquisition method:
Price and fund are not mandatory

The PO line is packed and sent to the vendor

The PO line is not invoiced

The PO line is redirected to the claims task list when appropriate

5. The vendor sends the Legal Deposit monograph or serial requested by the library.

6. The library sends an acknowledgment to the vendor on the following schedule:

   - For Legal Deposit monographs, at the time of receiving.
   - For Legal Deposit serials, Alma creates an out-of-the-box annual Analytics report, and you can create other reports, but Alma does not automatically send them. If required, you can run a job to send these reports to the required set of vendors. To do this:
     1. Create a set of vendors. See Vendor Sets.
     3. Configure the required Analytics report and enter its path. See Configuring Legal Deposit Report Paths. Also add the report as an Analytics object of type Report (see Scheduling).
Purchase Requests

The following roles are required to perform purchase request tasks:

- Create request from Alma/Primo with the user as the requester: Any role
- Create request from Alma on behalf of another user: Purchase Request Operator/Manager (the right to perform this task can also be enabled for other users by Ex Libris customer support)
- Create request from reading list: Course Reserves Operator/Manager (when enabled by Ex Libris for your institution)
- Manage requests: Selector, Purchase Request Operator, Purchase Request Manager
- Delete rejected requests: Selector + Selector Extended, Purchase Request Operator + Purchase Request Operator Extended or Purchase Request Manager + Purchase Request Operator Extended
- Assign requests: Purchase Request Manager

Purchase requests enable librarians using Alma and instructors or patrons using Primo or Leganto to request that a library purchase a resource. The requester can request an item for any reason, for example: the library does not have a copy (there is no bibliographic record, or there is a bibliographic record but no inventory), or the library does not have enough copies or in the right format or edition, or the existing copy is damaged. The requester, or a librarian on behalf of a requester, fills in as many details of the item as possible and then sends the request to Alma for review. Creating a request on behalf of another user can be performed by a Purchase Request Operator or Purchase Request Manager by default. To also allow users with other roles to create requests on behalf of other requesters, contact Ex Libris customer support.

An Alma user with the Purchase Request Operator role can see only requests assigned to them or requests that are unassigned. If their role is defined for a specific library they can create and see only those requests that belong to their library or those that don't belong to any specific library (the owning library field is empty). An operator that does not have Purchase Request Operator access will not have access to edit the requester in the purchase request form. The operator can reassign purchase requests to other purchase request operators. For customers that went live prior to the October 2018 release, this privilege is disabled by default. For all others, this privilege is enabled by default. To change this setting, contact Ex Libris support.

An Alma user with the Purchase Request Manager role can see and assign purchase requests for all operators and managers. If the role is defined in a library scope, they may only see and assign requests in that library or that do not belong to a specific library (the owning library field is empty). At the time that the purchase request manager assigns a request, it is checked to verify that the assignee is either an operator or manager for this scope or in the institution scope. An operator or manager that needs to delete purchase requests must also have the Purchase Request Operator Extended to do so.

When a user with one of these roles creates a purchase request, if the user is in the scope of a library, the library is added to the request as the Owning Library. If the user is in the institution scope, a pop-up will be presented to ask the user to select the owning library. If the user is not a purchase request operator or manager, the owning library will be empty. In this case, only the purchase request operator or manager can select an owning library when editing. The list of available libraries to assign will be determined by the editing user's scope.

An Alma user with the Selector role (Selectors) can view the list of requests and assign each one to users. Selectors can edit a request, email a requester for more information, and approve or reject requests. Approved requests become PO lines.

To support this feature, two letters are used:

- Purchase Request Status Letter (letter code: PurchaseRequestStatus) – Sent to requester when the request is...
approved or rejected.

- **Query to Requester** (letter code: QueryToRequesterLetter) – Sent to the requester when the librarian queries him or her for more information.

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**Note**

- Bibliographic records created using purchase requests are subject to normalization processes (see [Working with Normalization Processes](#)).
- Purchase requests is a service exposed from Alma to Primo. Like any other service, it can be hidden from groups of users using Alma's Display Logic Rules. This service is initially hidden from users by default with the rule **Hide Service Purchase Request**.

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**Purchase Request Link in Primo**

- To enable the service for all Primo users, remove this rule.
- To hide the service only for specific groups, remove this rule and then add a rule/rules to hide the service for those groups.
- You can also configure all labels used for this feature.
- To create a direct link to the purchase request form from Primo, see [Direct Linking to the Purchase Request Form](#).

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For more information about configuring display logic rules and configuring labels, see [Discovery Interface Display Logic](#).

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**Creating a Purchase Request**

A patron can create a purchase request in Primo. Requests made by patrons in Primo are submitted to Alma with the status **In Review**. A brief bibliographic record is created for the requested item, if required (and if the metadata is added manually, as stated in the note below).
You can also create a purchase request on behalf of a user in Alma. You can do this:

- When managing citations in a reading list (see Managing Citations), if the Submit Purchase Request privilege has been added by Ex Libris Support to the Course Reserves Operator/Manager roles. Note that simply adding or editing a citation may automatically trigger a purchase request; see Configuring Automatic Purchasing Requests from Citations.

- On the Purchase Request page (see below).

To create a purchase request on the Purchase Request page:

1. On the Purchase Request page (Acquisitions > Purchase Requests > Create Purchase Request), fill in as much information as you can.

Alma: Purchase Request Page

Select either Create new record or Use existing record on the Bibliographic Information field. When selecting Use existing record, a quick pick list is available for the Title field while the other item fields are restricted. Once you select an existing record, you can create the purchase request from this record. Alternatively, if you want to create an item from an existing similar item, you can search on the title of the existing record to populate the item's fields, then change the Bibliographic Information radio button to Create new record. The remaining item fields are not restricted while creating a new record, so the values can then be changed.

For a description of the fields in the Resource Information area, see Adding a New Book or Journal Article. The fields in the Request Attributes area are as follows:

- Requester – The user who is making the request
Request Status – The initial status of the request, which is always In Review

Owning Library – The library that should receive the item

Estimated Cost – An estimated cost for the item, including the currency

Fund – The fund from which to purchase the item. This field is only active after a library is selected. Note that it is recommended that you add the fund immediately before the purchase request is approved.

Vendor/Account – The vendor and vendor account from which to purchase the item

Approved By – This field is initially empty. It will later contain the name of the user who approved the item, if any.

Requester Note – Any note to send to the user who will be approving or rejecting the request.

Rejection Reason – This field is initially empty. This field will later contain the reason the request was rejected, if any.

The fields Title and Requester are mandatory.

When a purchase request is created using Create new record, Alma looks for a potential match to the record. The matching routine first looks for an import profile to determine the matching process. The import profile can be type Repository or New Order, must be active, and its profile name stored in the purchase_request_import_profile parameter (see Configuring Other Settings (Acquisitions)). The import profile can define which match routine will be used for books and which match routine will be used for journals. If no profile is specified in the parameter, the matching is based on the ISBN/ISSN in the purchase request (using a hard-coded matching routine that cannot be modified). If a matching record is found in the repository, the purchase request is linked to this bibliographic record. If no match is found, a new bibliographic record is created. Note that the bibliographic details of the matching or new record can be edited using the MD Editor. They cannot be edited by editing the purchase request (only request attributes, such as requester and owning library can be edited this way). When editing the purchase request, the bibliographic information can be changed by selecting the Create New Record radio button. When changing the radio button, the user will be prompted with the following confirmation message: You are about to change the linked bibliographic record. The existing bibliographic record data will be replaced. Are you sure you want to continue?

For more information, see the Configure a Preferred Match Method for Purchase Requests video (3:28 min.)

2. The citation type for a searched item comes from the ISBN or ISSN. If there is an ISBN number, the citation type is Book. If there is an ISSN number, the citation type is Journal. If neither number exists, the citation type is the type that was chosen when the purchase request was created. As an example of how this is applied, if the MD Editor is used to add an ISSN number to a bibliographic record, and the purchase request is then edited and saved, after the purchase request is saved, the citation type of the purchase request becomes Journal.

3. Select the Material Type, which can be Physical or Electronic. New for June! The default is determined by the value set in the Purchase Requests Material Type table. When the value is Physical, the type is determined by the default value in the Physical Material Type Descriptions table (see Configuring Physical Item Material Type Descriptions). When the value is Electronic, the type is taken from an internal table of electronic types, and is Book. The table of electronic material types is internal and cannot be modified.

4. Instead of entering the information manually, you can search for and select an item in the repository, and select Select. The item’s information is pre-filled in the page’s fields. See Searching in Alma.

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Note

When creating a purchase request associated with a bibliographic record, the bibliographic metadata cannot be edited on the purchase request page. This is to avoid either changing the existing record or creating a new one.
5. (When editing a request only) If you entered a Library, you can add locations and the number of requested copies for each location; select Add Location. If you do not specify quantities and locations, one copy in the default Acquisitions location is assumed.

6. Add any notes in the Notes tab, as required.

7. When you are done, select Save.

The request is submitted with the status In Review. A brief bibliographic record is created for the requested item, if required.

Managing Purchase Requests

The following tasks are available to manage purchase requests:

- Viewing Pending Purchase Requests
- Assigning a Purchase Request
- Editing a Purchase Request
- Emailing a Purchase Request
- Approving or Rejecting a Purchase Request

Viewing Pending Purchase Requests

To view pending purchase requests, select Acquisitions > Purchase Requests > Manage Purchase Requests from the Alma Main Menu. Alternately, if there are any unassigned requests, or there are any requests assigned to you, select one of the following tasks from the Tasks List in the persistent menu (see Tasks in the Task List):

- Purchase requests - assigned to you
- Purchase requests - unassigned

Manage Purchase Requests Page

Use the tabs to see requests assigned to you or to others, or to view unassigned requests. Use the facets and the Find tool to filter the list of requests on the page.

Note

For information on searching using special characters/diacritics, see Searching for Special Characters.
To view more details about the requested item:

- Select a request title to view the request in the MARC Record Simple View page.
- In the Unassigned or Assigned to Other tab, select View beneath a request to view the request details. The View link only appears in the Unassigned tab if the request was ordered or rejected.

Assigning a Purchase Request

You can assign a purchase request to a user or release an assignment. The user to which the request is assigned should approve or reject the request.

To assign requests to a user:

1. Select Assign to in the row actions list. A dialog box appears.

   ![Assign To Dialog Box](image)

2. Select the user to whom to assign the request. Only users with the relevant role appear in the drop-down list.
3. Optionally add a note and select whether to send an email to the user.
4. Select Assign To.

   The request is assigned to the selected user.

To move a request back to unassigned:

In the Assigned to Me or Assigned to Others tab, select Release Assignment in the row actions list. The request is moved back to the Unassigned tab.

Editing a Purchase Request

You can edit a purchase request.

To edit a request:

1. In the Assigned to Me or Unassigned tab, select Edit in the row actions list. The Purchase Request page appears. For more information, see Creating a Purchase Request.
2. Change any non-metadata fields as required.
3. You can select the Relink button to change the bibliographic record for this purchase request. When relinking, the value of the ISBN and citation fields are overridden with the value from the new bibliographic record. For more information, see the Relink a Purchase Request to Another Bibliographic Record video (1:41 min.)
4. When you are done, select Save.
Emailing a Purchase Requester

You can email the requester for more information about a purchase request.

To send email to the requester:

1. Select Send Query to Requester in the row actions list. An Email Message dialog box appears.

   ![E-Mail Message Dialog Box](image)

   E-Mail Message Dialog Box

2. Enter information in the fields. The **From**, **To**, and **Subject** fields are mandatory. Note that if the requester’s email is not prefilled, you must enter it manually.

3. When you are done, select Send E-Mail. A Query to Requester letter (letter code: QueryToRequesterLetter) is sent to the requester. For information about configuring the letter, see Configuring Alma Letters.

Approving or Rejecting a Purchase Request

Approving a purchase request creates a purchase order line. Whether you approve or reject the request, Alma sends an email to the requester.

To create a purchase order line for (approve) the request:

Before ordering the item, ensure that a library and/or location is selected in the request. If one is not selected, edit the request; see Editing a Purchase Request.

Select Approve and Order in the row actions list. A PO line is created with the status **In Review**; it then proceeds through the purchasing process, as usual. The PO line number appears in the confirmation message at the top of the page. Alma sends the requester a confirmation letter, the Purchase Request Status letter (letter code: PurchaseRequestStatus).

To reject a request:

1. Select Reject in the row actions list. A confirmation dialog box appears.
Alternately, you can reject multiple requests at once: Select the check boxes next to the requests that you want to reject and select **Reject Selected** at the top or bottom of the page. You can select all the requests on the page by selecting **Select All** at the top of the list of requests. Note that you cannot reject requests that were already approved.

2. Select **Confirm** in the confirmation dialog box. A reject reason dialog box appears.

![Reject Reason Dialog Box](image)

**Reject Reason Dialog Box**

This list of reasons can be configured by an administrator.

3. Select the reason for the rejection and select **Reject**. The request is rejected. If the request created a brief bibliographic record, it is also deleted. Alma sends the requester a Purchase Request Status letter (letter code: PurchaseRequestStatus) to inform him/her of the request rejection. For information about configuring the letter, see [Configuring Alma Letters](#).

An administrator can configure the reasons for rejecting a request; see [Configuring Purchase Request Reject Reasons](#).

After a request is rejected or approved, it appears in the list of requests with the option to delete the request. To delete the request, select **Delete** in the row actions list.

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**Note**

To delete a purchase request, you must have the **Selector Extended** role.

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## Managing Purchase Requests Created From Citations

You can create purchase requests manually or automatically using the processing rules (see [Configuring Automatic Purchasing Requests from Citations](#)).

The **Purchase Request** form displays basic information about the course.

![Course Information Table](image)

**Course Information Table**

The **Requester note** is displayed in the **Request Attributes** section of a purchase request.
The requester note contains information about the course, instructor, number of copies, and number of participants. The information in the requester note is pulled to PO lines and orders.

The following facets are available from the Manage Purchase Requests screen (Acquisitions > Manage Purchase Requests):

- Processing department
- Academic department
- Campus
- Course year
- Course term
- Citation tag

The following search criteria can be used when performing a search:

- Course Code
- Course Instructor
- Requester

Added Search Criteria
Check Availability and Pricing

The following role is required for the Check Availability and Pricing page:

- Purchasing Operator/Manager
- Purchase Request Operator/Manager

The Check Availability and Pricing tool enables purchasing operators/managers and purchase request operators/managers to search vendors, currently ProQuest OASIS (Online Acquisitions and Selection Information System) and Askews and Holts, for resources, and to view pricing information for the retrieved records.

Purchasing operators/managers can also place an order in two new ways:

- From the Check Availability and Pricing page, selecting the **View in External Vendor** button takes you directly to the vendor’s website where you can create an order. If the API is configured, the external order creates an accompanying PO line in Alma.

- From the Check Availability and Pricing page, selecting the **Create Order** button creates an Alma PO line. The price and currency of each item are automatically copied into the PO line. If the PO line is created in another currency, an exchange rate is calculated using the current date as an exchange rate date. Once the PO line details have been updated, an OASIS order can be sent directly to OASIS by selecting the **Integrate with OASIS** button on the Purchase Order Line Details page (see [Manually Creating a PO Line](#)).

Watch the [Check Availability and Pricing at Select External Vendors (OASIS and More to Come)](#) video (3:32 min).

In order to use this feature, you must first define a vendor in the System Integration tab of the Vendor Details page (see [Managing Vendors](#)).

![Vendor Details - System Integration Tab](image)

To define an OASIS vendor:

1. Select the **Availability and Pricing** check box.
2. Select OASIS in the **System Type** drop-down list.
3. Enter the **API Key** as supplied to you by OASIS.
4. Save the vendor.

To define an Askews and Holts vendor:

1. Select the **Availability and Pricing** check box.
2. Select Askews and Holts in the System Type drop-down list.

3. Enter the Customer ID, User Name, and Password as supplied to you by Askews and Holts.

4. Save the vendor.

Select Check Availability and Pricing from the Acquisitions > Purchase Requests menu. You can use the Search in repository button to first verify whether the title is already owned by your library. Type in your search term and select Go.

In the Request Results list, select Review results in the row action menu.

Select Create Order to create a PO line in Alma, or use the View in external vendor option to view the record in the vendor’s interface.

You can use the Rota tab to add resource sharing partners into your search. In addition to searching OASIS or Askews and Holts, this allows Alma to alert you if the selected partners have matching resources that can potentially be used for a resource sharing request. Select the Rota tab to define which partners to use in the availability and pricing check.
Select one or more partners from the **Partner** pick list. Select **Add partner** to include these partners in your rota. To remove a partner from the rota, select **Remove** from the row action menu.

Returning to the **General Information** tab, search by title or ISBN and select **Go**. The resources are listed in the request results:

![resources](image)

**Check Availability and Pricing - Resources Found**
Searching for PO Lines

To search for PO lines, you must have one of the following roles:

- Invoice Manager
- Invoice Operator
- Invoice Operator Extended
- Purchasing Manager
- Purchasing Operator
- Selector
- Trial Manager
- Trial Operator

When searching for PO lines, the search list is ordered alphabetically to help you find the search value quickly, while the recent history displays the most used fields. For more information on most of these fields, see Manually Creating a PO Line and PO Line Search Fields.

Search results for PO lines (see Searching in Alma) appear on a results page.

When the filter is set to All, closed PO lines are included in the search results. The available PO line statuses are:

- **In Review** – The initial status of a newly created PO line. Remains in this status if:
  - The operator/manager does not select **Order Now** or **Edit > Save and Continue** for the PO line.
  - Validation for the PO line fails
  - Criteria for configured Purchasing Review Rules have been met (see Configuring Purchasing Review Rules)

PO lines with the **In Review Status** are displayed on the Purchase Order Lines in Review page (see Reviewing PO...)

Note

- In the results, the **Assigned To** field indicates the user who is assigned to review the PO line. This user is not necessarily the same as the user who is assigned to handle the resource (for example, activate the PO line’s associated electronic resource).
- Articles (a, an, the) are factored in to an alphabetical sort.
• **Manual Packaging** – The PO line passed normalization, validation, and alert processing, and is ready to be manually packaged into a PO (see Packaging PO Lines into a PO)

• **Auto Packaging** – The PO line passed normalization, validation, and alert processing, and is ready to be automatically packaged into a PO (see Packaging PO Lines into a PO)

• **Ready** – The PO line was packed into a PO and is ready to be sent. For a PO to be sent to a vendor, all of its PO lines must have a status of **Ready**.

• **Sent** – The PO in which the PO line is packed was approved and sent to the vendor (see Approving and Sending POs). This status is relevant for both electronic and physical one-time PO lines and for inactive electronic continuous PO lines. For more information, see Approving and Sending POs.

• **Closed** – The PO line was closed (see Closing PO Lines)

• **Waiting for Manual Renewal** – The manual PO line was fully processed and received/activated and its renewal date is the same as the current date, and is to be renewed manually (see Renewals). These PO lines appear in the PO Lines to Review page. PO lines with the status **Waiting for Renewal** change to **Waiting for Manual Renewal** if they are marked for Manual Renew and the time to notify about the renewal arrives (this is configured as a certain number of days before the renewal date).

• **Waiting for Renewal** – The PO line was fully processed and received/activated and will be renewed automatically. Continuous physical PO lines that are sent to the vendor have **Waiting for Renewal** status even if the renewal is done manually but the renewal date has not yet arrived (see Renewals). Continuous electronic PO lines receive this status once they are activated and the user selects **Done** in the task list.

• **Waiting for Invoice** – All of the PO line's associated items were received and the PO line is ready to be associated with an invoice (see Invoicing). One-time PO lines that are not fully invoiced receive this status once they have been activated or received.

• **Under Evaluation** – Indicates that the PO line is under evaluation (a trial was requested or started; see Evaluations and Trials). PO lines with this status can be edited only by a Trial Manager/Operator.

• **Under Evaluation (Renewal)** – The PO line renewal is being evaluated and has not yet been decided. PO lines with this status can be edited only by a Trial Manager/Operator.

• **Deferred** – The PO line was set aside to be handled at a later date (see Deferrals)

• **Canceled** – The PO line was canceled (see Canceling PO Lines)

• **Deleted** – The PO line was deleted from the system (see Deleting PO Lines)

Depending on the nature of the PO line, you can choose from the following actions for a PO line:

• **Go to Task List** – Opens the respective task list to which the PO line is associated. The actions that can be performed on the PO line depend on its status and the task list to which the PO line belongs. Appears when the PO line is associated with a task (that is, listed under the **Tasks** heading on the Alma home page).

  For a PO line linked to a trial, this link opens the Manage Trials page. For more information, see Managing Trials.

• **View** – View PO line information on the PO Line Summary page (see Manually Creating a PO Line).

• **Edit** – Edit PO line information on the PO Line Summary page (see Manually Creating a PO Line).

• **Delete** – Delete the PO line from the system (see Deleting PO Lines).

• **Change Bib Reference** – Change the bibliographic reference of the PO line. See Changing Bibliographic Reference.

• **Close** – Close the PO line. See Closing PO Lines.

• **Cancel** – Cancel the PO line. See Canceling PO Lines.
• **Reopen** – Reopen a closed or canceled PO line. See [Reopening a Closed or Canceled PO Line](#).

• **Download EDI File** – Download the PO as an EDI file for review. The EDI file is created ad hoc based on the current data of the order. (For this link to appear, the vendor must be configured as an EDI vendor and the POs check box must be selected.)

• **Order in Claim List** – Appears for PO lines for which claims are generated and opens the Claim task list. Claims are created for PO lines when an order does not arrive or become activated by the expected date. For information on claims, see [Processing Claims](#).

For additional actions that appear when reviewing PO lines, see [Reviewing PO Lines](#). For additional actions that appear when packing PO lines, see [Packaging PO Lines into a PO](#). For additional actions when reviewing deferred PO lines, see [Deferring PO Line Workflow](#). For additional actions that appear when processing claims, see [Processing Claims](#).

For the list of alerts that may appear in a PO line entry (above the links), see AssertionCode in the Purchasing Review Rules Input Parameters table in [Configuring Purchasing Review Rules](#).

---

### Creating an Advanced Search for PO Line Sets

This section is deprecated and will be removed. See [Searching in Alma](#).

---

**Note**

The logic of how advanced searches are built changed in Alma's new UI from Alma's classic UI. As a result, saved advanced search queries (logical sets) built in the classic UI cannot be edited in the new UI (and vice versa). See [Advanced Search Logic: Differences Between the Classic and New UI](#).

---

If you are entering criteria for a PO line set, in addition to the search criteria described in [Searching for PO Lines](#), you can enter the following additional criteria (some of these are described in [Manually Creating a PO Line](#)):

- **Workflow** - Matches a workflow step or PO line status; select one from the drop-down box
- **Material supplier** - Matches a vendor code
- **Material supplier account** - Matches a vendor account code
- **Access provider** - Matches the access provider's code
- **Acquisition method**
- **Fund code**
- **Fund name**
- **License code**
- **Rush** - Select Yes or No
- **Cancellation restriction** - Select Yes or No
- **Reporting code** - Note that you cannot search by secondary or tertiary reporting code.
- **PO line type** - Select one from the drop-down box (see [Enabling/Disabling PO Line Types](#))

After entering criteria, select **Go** to see search results (to select items for an itemized set or to view how a logical set will appear). You can switch to a simple search by selecting the Simple Search link. For more information, see [Managing Search Queries and Sets](#).
Reviewing PO Lines

To review PO lines, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager

Users with either of the above roles that also have the role of Trial Operator/Trial Manager can also manage trials, which is relevant when a trial is requested or started (see Managing Trials). To delete PO lines, you must have the following role:

- Purchase Operator Extended

PO Line Review Workflow

A PO line is sent for review if there are data issues (such as incomplete/missing or invalid information) or alerts—as a result of the Purchasing Review Rules—thereby requiring the attention of a library staff person.

Review Within the Purchasing Workflow

PO lines requiring review appear on the Purchase Order Lines in Review page (Acquisitions > Purchase Order Lines > Review). You can also open this page with a specific tab pre-selected by selecting one of the following links on the Tasks List in the persistent menu (see Tasks in the Task List):

- Order lines - review - assigned to you
- Order lines - review - unassigned
Purchase Order Lines in Review Page

This page presents a record list of PO lines. For more about the Assigned to Me, Unassigned, and Assigned to Others tabs, see Assigned to Me, Unassigned, Assigned to Others Tabs. For more information about the PO line record list, see Searching for PO Lines. Only the person assigned to the PO line can edit the PO line information. Purchasing Operators and Managers can edit unassigned PO lines in the Unassigned tab and view the PO lines assigned to other library staff in the Assigned to Others tab.

The following facets are available:

- **Alerts** – The type of alert that was generated for the PO line
- **Purchase Type** – The type of item the PO line represents
- **Vendor** – The vendor to which the PO is to be sent
- **Rush** – Indicates whether the PO line is to be rushed
- **Library** – The library that ordered the material (the PO line owner)
- **Assignment** – The user to which the PO line was assigned

**Note**
The Assignment facet is available only to the Purchasing Manager in the Assigned to Others tab.

- **Acquisition Method**—The method by which the PO line was acquired, such as purchase or gift.
- **Expected Receipt Date** – The period that the PO line is overdue

**Note**
The Expected Receipt Date facet is available only for claims.

- **Reporting Code** – The Reporting Code of the PO line

Depending on the nature of the PO line in review, you can process the line using the following actions:

- **Edit** – PO lines are edited to correct incorrect information or to add missing information (see Editing PO Line Information). When you select Save and Continue on the PO Line Summary page, the PO line returns to step 2 in the workflow, where it is revalidated (it is not normalized at this time).
If the PO line is still invalid, it is once again sent for review. If all data issues have been resolved, the PO line proceeds to the Packaging step in the workflow (see step 4 in the workflow).

- **Assign to** or **Release assignment** – PO lines can be reassigned to another user or have their assignment released, meaning that the PO line is not assigned to any specific user (see [Assigned and Unassigned PO Lines](#)). A PO line that is reassigned remains in review until its issues are rectified.

- **Start a trial** or **Request evaluation** – When a trial is requested or started, for a PO line, it is automatically sent to the review task list. The PO line must be assigned to you in order to execute either action. If you have the **Trial Operator/Manager** role, you can start the trial (**Start a trial**). Otherwise, you can request that a trial be started (**Request evaluation**). For more information on trials, see [Evaluations and Trials](#).

- **Order now**—Move the PO line to the normalization and validation stage (see step 2) of the purchasing workflow before being packaged (see step 4) and sent. For more information on packaging PO lines, see [Packaging PO Lines into a PO](#).

  If you select **Order Now**, you receive an Order Now message (letter code: OrderNowLetter) after the order is sent for processing. The vendor receives the order using the Order List letter (letter code: OrderListLetter). For information on these letters, see [Configuring Alma Letters](#).

- **Defer** – PO lines in review can be deferred for any reason. PO lines that are deferred appear on the Review Deferred page until they are either reactivated (moved back to step 2 of the regular purchasing workflow), ordered (using the **Order now** option), or canceled. For more information on deferring PO lines, see [Deferring PO Lines](#).

- **Relink** – Enables you to link the PO line to a different bibliographic record (see [Relinking PO Lines](#)).

- **Cancel** – When a PO line in review is canceled, it is removed from the review task list, but not from Alma. It can be found by searching on the page or using the facets on the left side of the page. For more information on canceling PO lines, see [Canceling PO Lines](#).

- **Delete** – Deletes the PO line, as well as any transactions and inventory resources related to the PO line (see [Deleting PO Lines](#)).

---

**Note**

To delete a PO line, you must have the **Purchasing Operator Extended** role.

---

Inventory information appears in tabs under each PO line, except for service line types. For more information on working with these tabs, see [Record Lists](#).

The **Items** tab appears for physical one time lines, and includes:

- Library
- Location
- Call Number
- Barcode
- Availability - When the item is received, the indicator is green.
- Received Date

The **Holdings** tab appears for physical continuous lines, and includes:

- Library
- Location
- Call Number
• Summary
• Items Received - Select to open the list of items.

The **Electronic One Time** and **Electronic Continuous Lines** tabs appear if the PO line includes a resource that is part of a collection, and includes:

• Collection Name
• Service Type
• Availability
• Activation Date

---

**Editing PO Line Information**

You edit PO lines on the PO Line Summary page.

The PO Line Summary page header displays details of the PO line, its status (see Searching for PO Lines), type (printed book/E-book), the library for which the item is being ordered, and the order and line numbers. For examples of the PO Lines Summary page, see PO Line Summary Page – Electronic Item and PO Line Summary Page – Physical Item in Manually Creating a PO Line.

PO lines can be edited during any stage of the PO line workflow, but certain fields may be unavailable for editing, depending on the workflow stage/packaging status. For example:

• **Acquisition method** is editable only when the PO line is in the **In Review** status.
• **Currency**, **Location**, and **Material supplier** are editable only if the PO line has not yet been packaged.

**To edit the information for a PO line:**

On the Purchase Order Lines in Review page (Acquisitions > Purchase Order Lines > Review), select **Edit** in the row actions list in the Assigned to Me or Unassigned tab. The PO Line Summary page appears.

---

**Note**

While editing a PO line from this page, the PO line is locked and cannot be edited by other library staff.

---

The tabs in which you edit PO line data are described in step 10 through step 20 in Manually Creating a PO Line.

---

**Performing Global Changes on PO Line Sets**

To perform global changes on PO lines, you must have one of the following roles:

• Purchase Operator
• Purchase Manager
• Acquisitions Administrator
• General System Administrator

To change a list of PO lines, you must first create a PO line set, which is a set of PO lines; see Managing Jobs and Sets.
To perform global changes on PO lines:

Run one of the following jobs:

- Update PO Lines Workflow – Move PO lines to a specific stage in the workflow
- Update PO Lines Transactions – Modify PO line allocation between funds
- Update PO Lines Information – Update PO line information according to specified conditions
- Change PO Lines Status – Choose a status (Cancel, Close, or Delete) to which to change a set of PO lines
- Update PO Lines Limited Attributes – Modify PO line attributes after an order is created and sent to the vendor

For more information, see Running Manual Jobs on Defined Sets.
Packaging PO Lines into a PO

To package PO lines, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager

Packaging PO lines is the process of creating the PO that will be sent to the vendor.

If the Manual packaging option was assigned during PO line creation (in the PO line Summary tab – see Creating PO Lines), PO lines must be packaged manually into POs. If manual packaging was not assigned, PO lines are packaged automatically into a single PO if the PO Line - Packaging job is enabled (see Configuring Acquisition Jobs) and all the following properties match:

- Vendor account
- Owner
- Currency
- Continuity – One-time/continuous
- Acquisition method
- Source type
- Fund (if the po_packed_by_fund parameter is set to true; see Configuring Other Settings)

Note

- If the PO line is associated with more than one fund, an error is generated and the PO line must be packaged manually.
- The maximum number of PO lines that will be added to each PO is controlled on the Acquisition Jobs Configuration page; see Configuring Acquisition Jobs.
You manage PO lines that require manual packaging on the Select PO Line page (Acquisitions > Purchase Order > Package). You can also access this page by selecting the task Order Lines - packaging in the Tasks List in the persistent menu (see Tasks in the Task List).

Select one of the following links beneath a PO line to perform its action:

- **Edit** – Edit the PO line. See Editing PO Line Information
- **Create new PO** – Package the PO line into its own PO. The PO is sent for approval (see Approving and Sending POs). If a purchase order's acquisition method is Purchase, the process stops at the approval stage.
- **Order Now** – Send the PO line to the vendor without waiting for approval (see Approving and Sending POs). The Order Now letter (letter code: OrderNowLetter) is sent after the order is sent for processing. The vendor receives the order using the Order List letter (letter code: OrderListLetter). For information on these letters, see Configuring Alma Letters.
- **Defer** – Defer the PO line. See Deferring PO Lines
- **Relink** – Relink the PO line. See Relinking PO Lines
- **Change Bib Reference** – Change the bibliographic reference of the PO line. See Changing Bibliographic Reference
- **Cancel** – Cancel the PO line. See Canceling PO Lines
- **Delete** – Delete the PO line. See Deleting PO Lines
To manually package PO lines into a PO:

1. On the Select PO Line page (Acquisitions > Purchase Order > Package), select the check box to the left of each PO line you want to include in the PO.

   **Note**

   PO lines can be included in the same PO if they are for the same library, have a common vendor and common currency, share the same order pattern (one-time/continuous), and share the same acquisition method and source type.

2. Select **Create New PO**. The selected PO lines are packaged into a PO and the PO is sent for approval (see Approving and Sending POs).

---

**Reviewing POs**

To review POs you must have the following role:

- Purchasing Operator

A PO is sent for review if mandatory information is invalid or missing when the PO is created. After correcting or adding the mandatory information, the PO is packaged and moves to the Approval and Sending stage of the workflow (see Approving and Sending POs).

You review PO lines on the Orders in Review page (Acquisitions > Purchase Order > Review). You can also access this page by selecting the task **Orders - review** in the Tasks List in the persistent menu (see Tasks in the Task List).

**To review POs:**

1. On the Purchase Orders in Review page, select **Edit** in the row actions list for the PO you want to review. The PO Summary page appears.

   ![PO Summary Page](image)

   **PO Summary Page**

2. Edit the fields on the page, as required.
3. Select one of the following:
   ◦ **Save** – The PO is saved. Use this option if you are unsure if you want the PO to continue to the next stage of the purchasing workflow.
   ◦ **Save and Continue** – The information you modified is saved, the PO is packaged, and then proceeds to the approval and sending stage of the workflow (see Approving and Sending POs).

### Note
When saving a PO line, the expected receipt date of the items associated with the PO line is updated.

---

**To view POs:**

On the Purchase Orders in Review page (Acquisitions > Purchase Order > Review), select **View** in the row actions list for the PO you want to view. The PO Summary page appears. You cannot edit the fields on the page.

**To manually add PO lines to an existing PO:**

1. On the Purchase Orders in Review page (Acquisitions > Purchase Order > Review), select **Edit** in the row actions list for the relevant PO. The PO Summary page appears.
2. In the **PO Line List** tab, select **Add PO Line**. The list of PO lines that can be added to the PO appear. Note that only PO lines that are available for manual packaging appear in the list and are available to add to the PO; see the Summary Tab Fields table in Manually Creating a PO Line.
3. Select one or more PO lines to add.
4. Select **Select**. The PO line(s) is/are added to the PO.

### Deleting POs

**To delete POs:**

On the Purchase Orders in Review page (Acquisitions > Purchase Order > Review), select **Delete PO** in the row actions list and select **Confirm** in the confirmation dialog box.
Note

You can also delete a PO from the main menu by selecting Acquisitions > Purchase Order > Delete PO (see Deleting POs).
Approving and Sending POs

To approve and send POs, you must have the following role:

- Purchasing Manager

After PO lines are packaged into a PO and the PO is reviewed and saved using **Save and Continue** ([Packaging PO Lines into a PO](#)), if the approval rules pre-configured by Ex Libris require manual approval for POs, the PO is sent for approval. You approve POs on the Approve Orders page (**Acquisitions > Purchase Order > Approve**).

The Approve Orders page displays the following columns for each PO:

- Order #
- Status
- Date - The date on which the PO received its status.
- Vendor
- Organization unit
- Total price
- # of lines

To manually approve and send POs:

1. Optionally view information for a PO, select **View** in the row actions list. The PO Summary page appears with information on the PO. The fields on this page cannot be edited. To edit the PO, select **Edit** in the row actions list for a PO to open the PO Summary page and modify the following information:
   - Additional vendor, billing, and shipping information
     - The available shipping methods are configured by a code table. See Configuring Shipping Methods.
   - A list of each PO line included in the PO
   - Attachments to the PO
   - Notes for the PO

---

**Note**

When **Integrate by ERP Number** is selected for the **Export Orders (PO)** job (see Financial Systems), a PO's **ERP number** must be filled in for the PO to proceed to the next stage of the workflow. If **ERP number** is not filled
2. On the Approve Orders page, select each PO that you want to approve and send and select Approve and Send. You can approve and send individual POs by selecting Approve and Send in the row actions list for a specific PO.

The approved POs are sent to the relevant vendors as attachments to the Order List letter (letter code: OrderListLetter). For information on the Order List Letter, see Configuring Alma Letters. You can view the attachment from the Attachment tab of the PO and the vendor.

After sending a PO line, the expected activation date of the related resource is updated to the expected activation date of the PO line.

Resending POs

For PO lines that have not been canceled and whose Acquisition method is Purchase, you can resend the PO to the vendor by selecting Resend Order for the sent PO. This option is useful when the order was successfully sent by Alma, but due to technical reasons on the vendor's side was not properly received or was lost.

If the Alma could not send an order, the order appears in the Orders in Review page with an alert. To resend the order, edit the order and select Save and Continue. See Reviewing POs.

For more information on resending a PO, see the Resend a Purchase Order video (1:50 mins).

Deleting POs

To delete a PO, select Delete PO in the row actions list and select Confirm in the confirmation pop-up window.

For instances of when you would want to delete a PO, see Deleting POs.

Note

You can also delete a PO from the main menu by selecting Acquisitions > Purchase Order > Delete PO.
Managing EDI Order Report Tasks

When an EDI Order Report is received, the summary in the report is added as a note to the relevant PO lines. The status of items in the report may indicate that a PO line requires additional attention from the user.

For more information, see Managing EDI Order Reports.
Deleting POs

To delete POs, you must have one of the following roles:

- Purchase Operator Extended
- Purchasing Manager

You can delete a PO when it does not contain PO lines that are received, activated, or linked to an invoice. When deleting a PO, all of its associated PO lines are also deleted. To delete PO lines, see Deleting PO Lines.

Deleting a PO creates a report when the job is completed, as is the case for all other jobs (see Viewing Completed Jobs).

To delete a PO:

1. On the Delete PO page (Acquisitions > Purchase Order > Delete PO) and select a PO from the quick pick list. You can also delete POs when reviewing (Packaging PO Lines into a PO) or approving (Approving and Sending POs) them.

2. Select Delete PO and select Confirm in the confirmation dialog box to delete the PO. A confirmation message appears on the Delete PO page, indicating the status of the PO.

Select Go to Monitor Jobs to view the progress of the delete request (see Viewing Running Jobs).
Receiving Material

To receive material, you must have the following role:

- Receiving Operator

The final step of the purchasing workflow is the receiving stage, in which the physical material that was ordered from a vendor is received (see Receiving Physical Material). If the PO line is for electronic material, it proceeds to the activation stage (see Activating Electronic Resources).

1. The physical material that was ordered from the vendor arrives.
2. On receipt of the material, the system checks whether the material type is continuous. If the type is continuous, it proceeds to step 3. If the type is not continuous, it proceeds to step 4.
3. The material is marked as Waiting for Renewal (see Renewals).
4. The physical material is received in the system according to its material type, either One-time or Continuous. For details, see Receiving Physical Material.
5. The final step in the receiving workflow is to await the invoice from the vendor or to create the invoice in Alma (see Invoicing).

Watch the Receiving Workflows video series (3 videos).
Receiving Physical Material

You accept new physical material into Alma by matching the PO line with the material received. You then indicate whether further work must be performed before the material is available to the library for which it was ordered.

Physical material that is received has one of the following statuses:

- **One-Time** — Receipt of material for a PO line that is not repeated on a frequent or regular basis.

  **Note**
  
  When a PO line expects multiple items, the PO line is not fully received until all items are received. If the remaining items will not be received for some reason, remove the items from the PO line and from the inventory and then re-receive the previously received items.

- **Continuous** — Receipt of material for a PO line, repeated on a regular basis. The material must be connected to an existing holding and can be magazines, periodicals, and so forth. To more easily manage receiving serials, see Prediction Patterns.

  **Note**
  
  For information on handling items with different receiving intervals, see the explanation for the Technical acquisition method in Acquisition Methods.

- **Standing order** — Receipt of material for a PO line, issued as needed on an infrequent or irregular basis. For example, a Standing Order PO line is used for purchasing all the printed books by a particular author when they are published, or where a series of books are being published, but not necessarily on a regular basis. The holdings for this type of PO line are updated upon the receipt of the material.

  When receiving standing order material, note the following:

  ◦ When receiving Standing Order non-monograph material, multiple items can be associated with a single holding, as they can with Continuous material.

  ◦ When receiving Standing Order monograph material, a unique workflow is invoked (see step 5 in To receive new physical material: below). The standard receiving workflow, performed on the Receive New Material page, is not invoked.

  **Note**
  
  For information about these statuses, see Receiving Material.

Receiving New Physical Material

To receive a physical monograph standing order, see Receiving Physical Standing Order Monograph Material. Physical standing order non-monograph material is handled the same as continuous material (see below).
Before receiving physical material, you must ensure that you are at the appropriate receiving department; see Library/Desk Selector in The Persistent Menu. If the department is at a circulation desk with a self-check in machine, you may also be able to receive the item at a self-check machine; see Self-Check Machines.

**To receive new physical material:**

1. Ensure that you are at a receiving department.
2. On the Receive New Material page (Acquisitions > Receiving and Invoicing > Receive), locate the PO line you want to receive.

![Receive New Material Page](image)

**Receive New Material Page**

Use the secondary search and the following filters to help you locate the PO line.

---

**Note**

- When searching for an invoice number, select **Invoice Number** instead of **All**.
- Searching for **Common Fields** includes the following fields: Vendor reference number, PO line (number), Additional PO line reference, Title, Standard number, and Vendor title number.

---

**Find PO Lines for Receiving Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>The status of the PO lines. For the list of statuses, see <a href="#">Searching for PO Lines</a>. Items with a status of <strong>In Transit</strong> retain their status until they are scanned at the target location. If the item’s location is the shelving library, the item retains its status until it is scanned at the primary circulation desk. You can receive items for <strong>Closed</strong> PO lines, for example for magazine subscriptions that are fully paid but for which the last issue has not yet been received. A PO line with the status <strong>Waiting for Invoice</strong> (meaning all of its associated items were received) appears on this page only if it contains items that were received with the <strong>Keep in department</strong> option selected. The default value is the value of the user’s most recent search.</td>
</tr>
<tr>
<td><strong>Locate</strong></td>
<td>The method to use (from a list predefined by an administrator). You can select:  - <strong>Entire PO content</strong> – Find PO lines that are packaged in the same PO as the PO lines that match the search criteria</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>Vendor</td>
<td>The vendor from which you anticipate receiving the material.</td>
</tr>
<tr>
<td>Note</td>
<td>The displayed list includes only the vendors that are assigned the role of <em>Material Supplier/Subscription Agent</em>.</td>
</tr>
<tr>
<td>Orders with patron requests</td>
<td>Filter search results to items that have patron requests.</td>
</tr>
<tr>
<td>Note</td>
<td>This option appears only for one-time orders.</td>
</tr>
<tr>
<td>Orders with interested users</td>
<td>Filter search results to items that have interested users. After the search is completed, items with interested users are indicated in the table by a yellow check mark in the <em>Interested Users</em> column.</td>
</tr>
<tr>
<td>Shelf ready</td>
<td>Whether no further work is required on the material and that it can be sent to the library. If you select this, scan in the barcode (see next row).</td>
</tr>
<tr>
<td>Scan item barcode</td>
<td>Enter a barcode or search for the item. See <em>Searching in Alma</em>. If you have RFID installed and an active RFID connection, you can scan the RFID. For more information about RFID, see <em>RFID Support</em>.</td>
</tr>
<tr>
<td>Note</td>
<td>This field appears only when <em>Shelf ready</em> is selected.</td>
</tr>
</tbody>
</table>

**Note**
- Select the check marks in the *Notes* or *Interested Users* column to display the Notes or Interested Users tab for the PO line (see the *Navigate to Notes During Receiving* video (1:47 mins).
- PO lines that are fully received and do not require additional tasks to be performed (on the In Process Items page) do not appear.

The table is the same in the *Continuous* tab as in the *One-Time* tab, with the following exceptions in the *Continuous* tab:
- There is no check box preceding the PO line numbers.
- There is no *Items Received* column.
- Select a row actions list action to:
  - **Manage items** — View details of the PO line and manage each of the PO line's items. For example, you may want to configure what happens to the items after they are received, mark an item as received, or change the permanent location of one of the items. See steps 3a or 4a, below.
  - **Receive** — Specify items that have been received for the PO line.
- **Print Interested Users List** — Print the Interested Users In letter (letter code: InterestedUsersInLetter), which lists interested users for the PO line. Appears only if the PO line has interested users (there is a check mark in the **Interested Users** column).

Search results appear only in the tab (**One-Time, Continuous**) that is selected at the time of the search.

3. Optionally select one of the following options that appear on this page:
   - Select the item description to view metadata for the resource; see [Viewing Metadata Read-Only in the Simple Record View Page](#).
   - In a PO line row, select the checkbox in a **Notes** or **Interested Users** column to see the notes or interested users for that PO line.
   - Select the **Receive All** button to receive all PO lines currently shown on the page. If a filter is applied, only those records that match the filter are received. The **PO Line - Receive All** job runs.
   - The **Received date** indicates the date that the item is/was/will be received. It is initially set to the current date. Change the date as required.
   - Select **Keep in department** to indicate that further work is required before the material can be made available in a library. When this option is selected, an Acquisition Technical Services work order is created (the default work order type), and the **Next step** field appears.

In the **Next step** field, select the next step for the specified PO line after it is received. The available options are the statuses configured for the Acquisition Technical Services work order, which by default are:

- Physical processing
- Copy cataloging
- Temporary storage

Items that require further processing can be viewed on the In Process Items page, using Acquisitions or Fulfillment (see [Processing Materials](#)). You can also view this page by selecting the task **Requests - Digitization - need approval** in the Tasks List in the persistent menu (see [Tasks in the Tasks List](#)).

If **Keep in department** is not selected, the item must be scanned at a circulation desk before it is placed on the shelf in the library (see [Scanning Items](#)).

---

**Note**

- If **Keep in department** is not selected, interested users are notified when the item is received.
- If **Keep in department** is selected, interested users (see information regarding the Interested Users tab in [Manually Creating a PO Line](#)) receive the Interested In email notification (letter code: InterestedInLetter) in the following scenarios:
  - After the **Next step** selection (such as physical processing or copy cataloging) is complete and the item leaves the department.
  - When selecting **Done** in the row actions list for Continuous material on the In Process Items page (see [Post-Receiving Processing](#)).

---

4. If you received the item after scanning in the barcode (see **Shelf ready**, above), select **Receive** to receive the item. The workflow is complete. Otherwise, continue as follows:

- [Receiving One-Time Material](#)
- [Receiving Continuous Material](#)
Receiving One-Time Material

... continued from Receiving New Physical Material.

5. Optionally select Manage Items in the row actions list to view details of the PO line. The Received Items List page appears. Select the Bibliographic Information tab to view bibliographic record information about the ordered item.

![Received Items List Page](image)

To edit the inventory for a PO line item, select Edit Inventory Item in the row actions list for the appropriate PO line item. The Physical Item Editor page appears, where you edit the item details as needed and select Save. For a description of the fields on the Physical Item Editor page, see Updating Item-Level Information and the New Items Details Fields table, below. For example, you may want to edit the permanent location of one of the items. Select Back to return to the Receive New Material page.

6. Select the check boxes for the PO lines you want to receive, and select Save and Receive. (If there are any warnings on the items, a confirmation dialog box appears with the warnings; an administrator can configure the validations; see Configuring Receiving Departmental Validations. Select Confirm). A message appears at the top of the page, indicating the status of the process.

**Note**

Only the check boxes for the PO lines that can be received are active. All other check boxes are unavailable.

If you selected Keep in department in the Receiving Settings section, a message appears at the top of the page confirming that further work must be performed before the material can be made available to the library.

7. For received PO line items in handling stages, select one of the following from the row actions list:
   - Edit inventory item
   - Write to RFID
     - Appears for locations with RFID and an active RFID connection. The information is written to the RFID. For additional information, see RFID Support.
   - Done
   - Send to temporary storage
   - Send to copy cataloging
   - Send to physical processing
   - Print slip – A print slip is printed on the department’s printer and sent by email to the configured user (see Configuring Allowed Emails). Notes contained in a PO line, as well as notes configured using the Receiving Slip Notification Letter configuration option (see Customizing Letter XSL Style Sheets) are sent with the print slip.
An example of a print slip that is sent to the configured user is displayed in the following image:

---

### Note

You must be in an acquisition or receiving department for the print slip option to be available.

- **Un-receive** — Revoke the received status of an item if it was mistakenly marked as received. See [Receiving Material](#).

---

### Note

In order to be able to un-receive an item, the following conditions must be met:

- The item must have been marked as received
- The item must still be marked as in the receiving department

---

For more information on these options, see [Post-Receiving Processing](#).

Watch the [Receiving One-Time Print Items](#) video (5:00 mins).

---

### Receiving Continuous Material

... continued from [Receiving New Physical Material](#). This process is also used to receive physical standing order non-monograph material. To receive predicted continuous items, see [Receiving Predicted Items](#).

5. Select **Manage Items** in the row actions list to view details of a PO line. The Received Items List page appears. Select the **Bibliographic Information** tab to view bibliographic record information about the ordered item. When enabled, holdings information may also appear; see [Viewing Holding Information](#).
If the expected receiving date of an item has passed and the item has not been received and the PO line is not already in Claim, the action **Claim Missing Items** appears. Select **Claim Missing Items** to move the PO line into Claim. The PO line moves to Claim and **Claim Missing Items** no longer appears.

Select **Analytics Issues Report** to view a Missing Issues report of non-received items for this PO line. In the report, select **Open in a new window** to open the report in a new tab, **Expand** to open the report in Analytics to change the report parameters, or **Close** to close the report.

Note

For information on configuring sort routines, see Configuring Physical Item Sort Routines.

To edit the inventory for a PO line item, select **Edit inventory item** in the row actions list for the appropriate PO line item. The Physical Item Editor page appears, where you edit the item details as needed and select **Save**. For more information, see Updating Item-Level Information.

Select **Back** to return to the Receive New Material page.

On the Receive New Material page, select **Receive** in the row actions list for a PO line to display the Receive New Items page.
Receive New Items Page

The Receive New Items page lists the last received item’s details and enables you to enter details for a new item, as required. All item details are listed in the **Items Arrived** area at the bottom of the page.

### Note

You can also access the Receive New Items page by selecting **Receive New Items** on the Received Items List page.

7. Under the page header:
   - The **Received date** defaults to today’s date. To change the date, select in the **Received date** box and select the required date from the **Calendar** pop-up.
   - Select **Keep in department** to indicate that further work is required before the material can be made available in a library. When this option is selected, the **Next step** field appears.

In the **Next step** field, select the next step for the specified PO line after it is received. The available options are **Physical processing**, **Copy cataloging**, and **Temp storage**. Items that require further processing can be viewed on the In Process Items page, using Acquisitions or Fulfillment (see **Processing Materials**). You can also view this page by selecting the task **Requests - Digitization - need approval** in the Tasks List in the persistent menu (see **Tasks in the Tasks List**).

8. In the **New Item Details** area, enter cataloging details for the new item in the **Enumeration** and **Chronology** fields, as required.

The following table shows sample values for the **Enumeration** and **Chronology** fields.

<table>
<thead>
<tr>
<th>New Items Details Fields</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enumeration A</td>
<td>Vol.1</td>
</tr>
<tr>
<td>Enumeration B</td>
<td>Qtr. 2</td>
</tr>
<tr>
<td>Enumeration C</td>
<td>Part 1</td>
</tr>
<tr>
<td>Field</td>
<td>Value</td>
</tr>
<tr>
<td>-------------</td>
<td>-------</td>
</tr>
<tr>
<td>Chronology I</td>
<td>2012</td>
</tr>
<tr>
<td>Chronology J</td>
<td>April</td>
</tr>
<tr>
<td>Chronology K</td>
<td>1</td>
</tr>
</tbody>
</table>

When these values are entered, select **Generate** to create a description in the **Description** field using the entered values, as follows:

**Vol. 1 Qtr. 2 Part 1 2012 April 1**

**Note**

- If no value is set for **Description**, the item is treated as a monograph. If a value is set for **Description**, the item is treated as a serial and is displayed as such in the Get It tab (with the Get It tab display being slightly different, in order to supply the information for the serial title). Requests are made on the description level rather than on the title level. The **Description** field is what Primo and Alma use to identify the context of a request when it is placed. Patrons placing a request from Primo (or staff placing a request on behalf of the patron in Alma), select from a list of defined descriptions for a given title’s items.

- Either the **Enumeration A** or **Chronology I** field must have a value.

- The values of each of the **Enumeration** fields appear before the values of the **Chronology** fields.

- To simplify the task of entering Enumeration and Chronology information, you can create a description template. For more information, see [Configuring Description Templates](#).

The values of the most recently received item appear in the **Last Received Item Details** area. Select **Duplicate** to automatically move these values to the respective fields in the **New Item Details** area.

9. Select **Create and Receive**.

If you selected **Keep in department** in the **Receiving Settings** section, a message appears at the top of the page confirming that further work must be performed before the material can be made available to the library. The new item then continues in the workflow according to your selection in the **Next step** drop-down list. For more information, see [Post Receiving Processing](#).

Alternatively, you can select **Receive and set barcodes** to set barcodes for the items that you are receiving. The **Set Barcodes** dialog box opens where you enter barcodes for the items and select **Submit**. Refer to Scanning Items or the Scan item barcode description in the Find PO Lines for Receiving Fields table above for more information about scanning barcodes.

---

**Set Barcodes Dialog Box**
Watch the Receiving Continuous Print Items video (5:00 mins).

**Viewing Holdings Information**

To enable viewing holdings information when receiving continuous material, set the `view_holding_in_receiving` parameter to `true` (see Configuring Other Settings).

---

**Note**

Ensure that you are at an Acquisitions department; see Library/Desk Selector in The Persistent Menu.

---

To view holdings information when working with continuous material:

2. Locate a PO line that has a value in the Locations field, and select Manage Items in the row actions list. The Received Items List page appears.
3. Select the Holdings Information tab.

![Holdings Section of Received Items List Page](image)

The metadata information for the holdings appears in this section.

4. You can select Edit Holdings to open the MD Editor page and edit the holdings (see Metadata Management).

---

**Receiving Standing Order Monograph Material**

To receive non-monograph material, see Receiving New Physical Material. You receive new items into a standing order by creating the standing order (see Manually Creating a PO Line), creating holdings for the new item, and attaching the new item to the standing order.

1. Ensure that there is a standing order PO line to attach to the new item.
2. Create a new physical holdings (Resource Management > Create Inventory > Add Physical Item) (see Adding a New Book or Journal Article).
3. Select New in the Choose holding type field, select either a book or an article in the Citation type field, and select Choose. The Quick Cataloging page appears.
4. Configure resource and item information, and select Save. The holdings and item are created, and the new item appear in a record list; see Searching in Alma.
5. Select **Items** or **View All Items** in the row actions list to view the newly created item.

6. Select **Edit** in row actions list. The Physical Item Editor appears (see [Updating Item-Level Information](#)).

7. In the **PO line** field, select the PO line of the standing order monograph to link to this item.

8. Enter the receive date in **Receiving Date**.

9. Modify any other fields as required.

10. Select **Save** to save the item and close the Physical Item Editor.
Post-Receiving Processing

To perform post-receiving processing tasks, you must have one of the following roles:

- Receiving Operator
- Purchasing Operator

Processing Materials

After you receive physical material, it may be necessary to perform work on the material before it can be made available to the library. In addition, a work order request may require you to perform work on material before other requests can be made on it.

The following additional work may be necessary:

- **Copy cataloging** – Complete the cataloging of the new material
- **Physical processing** – Add a barcode to the material
- **Temp storage** – Move the material to temporary storage for a short period
- **Digitization** – If you are at a digitization department. For more information, see Digitization Processing.

Watch the Post Receiving Process and Claims video (3:00 mins).

Additional work process statuses may have been defined by your administrator; see Configuring Work Order Type Statuses. You process new material or work orders on the In Process Items page.

In Process Items Page

The In Process Items page can be accessed in any of the following ways:

- **Fulfillment > Resource Requests > Manage In Process Items**
- **Fulfillment > Resource Requests > Scan In Items**; select Manage In Process Items
- **Acquisitions > Post-Receiving Processing > Receiving Department Items**
- Select one of the following tasks in the Tasks List in the persistent menu (see Tasks in the Task List):
  - Items - deposit
  - Items - digitization
- **Items - document delivery**

  The above tasks only appear when you are at a digitization department.

- **Items - in department**

- **Items - in department - requested by patron** - Purchase requests (see Purchase Requests)

  These tasks only appear when you are at a department that enables you to manage in process items, other than digitization.

The page is available only when you are working in a department that can manage work orders and you have the **Work Order Operator** privilege for that department, not from a resource sharing or out-of-the-box circulation department. If your circulation department was configured to manage work orders, you can navigate to the page only using the **Manage In Process Items** link on the Scan In Items page or the **Receiving Department Items** menu option. The filters, statuses, columns, and actions on this page vary, depending on your current department:

<table>
<thead>
<tr>
<th>Department</th>
<th>Filters</th>
<th>Columns</th>
<th>Actions</th>
</tr>
</thead>
</table>
| Digitization | **Step** (see Digital Inventory Profile Rules):  
  - Deposit  
  - Digitization  
  - Document Delivery  
  - Remote Digital Storage  
  **Request Type**:  
  - Electronic Digitization  
  - Physical Digitization | **Title**  
  **Requester**  
  **Status**  
  **Request/Process Type**  
  **Notes**  
  **Date Received department**  
  **End of Activity** | **Edit**  
  **Add Digital Inventory**  
  **Attach Documents**  
  **Cancel Request**  
  **Change to Electronic/Physical Digitization**  
  **View It** |
| All other departments (for example, Acquisitions Technical Services) | **Process Status**: The options depend on the work order type; see Work Orders and Departments  
  **Request Filter**:  
  - No requests  
  - Library requests  
  - Patron requests  
  - Patron and library requests  
  **Interested Users** (see interested users in Manually Creating a PO Line):  
  - Items with interested users  
  **Library**:  
  - Names of the available libraries | **Title**  
  **Identifier**  
  **Barcode**  
  **Status**  
  **Date received department**  
  **End of Activity**  
  **Modified By**  
  **Modification Date**  
  **Requests**  
  **Canceled**  
  **Notes**  
  **Interested** | **Edit Inventory item**  
  **Edit**  
  **Done**  
  **Update Expiry**  
  **Print Slip**  
  **Write to RFID** |
<table>
<thead>
<tr>
<th>Department</th>
<th>Filters</th>
<th>Columns</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Users</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Library</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Call Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Accession Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Item Call Number</td>
<td></td>
</tr>
</tbody>
</table>

### Performing Tasks and Actions

In a non-digitization department, you can perform the tasks/actions below. The availability of a task depends on the item state and your role permissions.

**Row Actions/Tasks:**

- Edit the inventory item ([Edit Inventory Item](#)) – This opens the Physical Item Editor. For more information, see [Updating Item-Level Information](#).
- Add a note to an item ([Edit](#)) – See [Adding a Note to an Item](#).
- Update an item’s expiration date ([Update expiry](#)) – See [Updating an Expiration Date](#).
- Create a print slip ([Print slip](#)) – See [Creating a Print Slip](#).
- Write the item's information to RFID ([Write to RFID](#)) – This option appears for locations with RFID and an active RFID connection as indicated by the connection icon ( ). For additional information, see [RFID Support](#).
- Un-receive an item ([Un-receive](#)) – See [Un-receiving an Item](#).

**Button Actions/Tasks:**

- Change an item’s status – See [Changing an Item’s Status](#).
- Generate Barcode – See [Generating Barcodes](#).
- Remove an item from the list (by marking it as [Done](#)) when all the work processes are complete – See [Marking an Item as Done and Removing It](#).

The tasks available in a digitization department are described in [Digitizing Items](#) and [Delivery of Digitized Items](#).

### Changing an Item's Status

**To change an item’s status:**

1. Select the item’s check box on the In Process Items page.
2. Select the new status from the [Change Status](#) drop-down list in the table actions list.
3. Select **Change Status**. The item’s status is changed.

---

**Note**

- You can change the status of multiple items simultaneously by selecting multiple check boxes and then modifying the item status, as described above.
- You can also change the status of an item on the item’s Request Management page (Edit in the row actions list by selecting a different status from the Status drop-down list and selecting Save.

---

**Generating Barcodes**

Automatically generating barcodes can be handled from the In Process Items page when you system is configured for automatic barcode generation. See Configuring Barcode Generation for more information.

When you automatically generate barcodes for multiple items, it needs to be done for one library at a time. As a result, when you select multiple items/rows for generating a new barcode on the In Process Items page, they all need to be from the same library. This can easily be done by using the Library filter to display a single library's list of items to be processed. If you happen to select items from different libraries, an error message appears. You will also receive an error message if you attempt to generate a barcode for one or more items that have requests or are on loan.

**To generate a barcode:**

1. Select the check box for one or more rows on the In Process Items page to identify the items for which you want to generate barcodes.

2. Select **Generate Barcode**.

   Alma checks for an automatic barcode generation configuration for the library identified in the row(s) you are processing. If there are multiple library-level and/or institution-level sequences that match the library in the row(s) that you are processing, a dialog box appears with sequence options. Select a sequence option.

   ![Sequence List](image)

   List of Institution-Level Barcode Generation Options

   3. Select a sequence and select **Select**. The barcode is generated and appears in the Barcode column on the In Process Items page.
Marking an Item as Done and Removing It

Note
Marking an item as done can be handled as both a button action and a row action.

To mark an item as Done and remove it:
Select one or more check boxes on the In Process Items page and select Done in the table actions list (or select Done in a row actions list). The item(s) is removed from the page.

Note
When working with Print – Continuous material and the Keep in Department option is selected on the Receive New Material page (see Receiving Physical Material), selecting Done (or selecting Done in a row actions list sends a notification email to Interested Users (see information regarding the Interested Users tab in Manually Creating a PO Line).

Adding a Note to an Item

To add a note to an item:

1. Select Edit in a row actions list for the relevant item. The Request Management page opens.
2. Select the Notes tab and enter a note in the Note field.
3. Select Add. The note is displayed on the page.
4. Select Save. A check mark appears in the Notes column of the Department Items page, indicating that the item contains a note.

To edit a note, select Edit in the row actions list and modify the note as required. Select Save to save your modification.

To delete a note, select Delete in the row actions list at the end of the note row. The note is deleted.

Updating an Expiration Date

To update an expiration date:

1. Select Update expiry in the row actions list for the relevant item. The Update Expiration Date pop-up window appears.
2. Select the Expiration date.
3. Select Save. The expiration date is changed.
Creating a Print Slip

To create a print slip:

Select Print slip in the row actions list for the relevant item. A message appears on the top of the page indicating whether the print slip was sent successfully by email (see Configuring Allowed Emails). A printer must be defined for the acquisitions or receiving department for the print slip to be sent by email. For details on configuring a printer for a department, see Adding a Department.

Un-receiving an Item

To un-receive an item:

Select Un-receive in the row actions list (in Acquisitions > Post-Receiving Processing > Receiving Department Items only) for the relevant item and select Confirm in the confirmation dialog box. The item is un-received.

Note

In order to be able to un-receive an item, the following conditions must be met:

- The item must have been received
- The item must still be in the receiving department
- There are no interested users related to the item.

Scanning in Items

For information on scanning items, see Scanning Items.
Processing Claims

To process claims using the Claim page, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager

Claims are created for PO lines when an order does not arrive or become activated by the expected date (claims notifications are sent for EDI or physical PO lines, as explained below). If a PO line is overdue, you can view it on the Claim page (Acquisitions > Purchase Order Lines > Claim). You can also open this page by selecting Order Lines with claims in the Tasks List in the persistent menu (see Tasks in the Task List).

Claims are generated by Alma as follows:

- For continuous physical PO lines — Several fields from both the PO line and the item work together to determine when a PO line is sent to claims. The fields associated with the PO line are (see the Vendor Information area of the Summary tab in Manually Creating a PO Line):
  - **Expected receipt after ordering** - After the PO line is sent, the Expected receipt date is set to: the date that the order was sent + this value.
  - **Subscription interval** - If you are not using prediction patterns (see below), then, after any item in the holdings associated with this PO line is received, the PO line's Expected receipt date is updated to: the item's Receiving date + this value.
date + this value.

- **Expected receipt date** - You can manually override either of the two previous fields by setting this field to a specific date. When this date is changed, the Receiving dates of the items associated with this PO line are changed.

- **Claiming grace period** - This value is added to the Expected receipt date in any of the above cases. The PO line is sent to claims after the grace period elapses: Expected receipt date + Claiming grace period. When a PO line is sent to the Claim page. The default value depends on what was configured in the vendor account (see Adding a Vendor and Vendor Account).

  - If the EDI Claims Letter is enabled (see Enabling/Disabling Letters), then for vendors that use EDI and have enabled EDI claims (Claims must be checked on the EDI Information tab of the vendor; see Electronic Data Interchange (EDI)), a notification is automatically sent to the vendor using EDI. You can configure the notification (see Configuring Alma Letters).

  - If the email Claims Letter is enabled (see Enabling/Disabling Letters) and the auto_claim_co parameter is set to Y (see Configuring Other Settings), then for vendors with defined email addresses (see Managing Vendors), a notification is automatically sent to the vendor using email. You can configure the notification (see Configuring Alma Letters). If the vendor uses EDI, Alma will send an EDI claim instead of a claim letter.

  - Otherwise, a notification is not sent automatically. You can send a notification manually using email (see Communicating with Vendors).

- **Reclaim Interval (days)** - Alma will send reclaim letters at the defined interval after the initial claim letter is sent. If the field is not populated, a reclaim letter will not be sent.

The fields associated with the item are (see Prediction Patterns and Updating Item-Level Information):

- **Receiving date** - This is the date that the item was received. When the Expected receipt date of the associated PO line is changed, this date is changed to match.

- **Expected receiving date** - An item only has its own Expected receiving date if you are using prediction patterns. This field is set by the prediction pattern configuration. When there is a value for this field, the Expected receipt date of the PO line is ignored. Just like the Expected receipt date in the PO line, the PO line is sent to claims after the grace period elapses: Expected receipt date (of the item) + Claiming grace period (of the PO line).

  - For one-time physical PO lines – The same logic is used as described above for continuous PO lines: if an Expected receipt date is defined for the PO line, it overrides one defined for the item. Since this is a one-time order, there is no subscription interval and the Expected receipt date is not reset after the item is received.

After the grace period, a claim is sent automatically to the vendor, either by EDI or by email, but only the first time this PO line is sent to the Claims page; if an operator updates the PO line’s expected receipt date, and the PO line is sent to the Claims page again after the new date, another notification is not sent.

Also, the parameter to enable email notifications for one-time physical PO line claims is auto_claim (instead of auto_claim_co; see above for more information). If the vendor uses EDI, Alma will send an EDI claim instead of a claim letter.

  - For electronic PO lines – Alma calculates the claim date as described above for continuous PO lines, except that Alma uses Expected activation date and Expected activation after ordering instead of Expected receipt date and Expected receipt after ordering. When this Expected activation date + Claiming grace period arrives, and the PO line (either one-time or continuous) is still not activated, then the PO line is sent to claims.

  Example: If the vendor is configured with Expected activation after ordering = 5 and Claiming grace period = 2, then If the electronic resource is ordered on April 20, the PO line goes into claims on April 28. April 20 + 5 days + 2 days grace = April 27; the resource is expected to be activated by the end of April 27.
If EDI Claim Letters are enabled, then for vendors that use EDI and have enabled EDI claims, a notification is sent using EDI (Claims must be checked on the EDI Information tab of the vendor; see Electronic Data Interchange (EDI)). Otherwise, a notification is not sent automatically. You can send a notification manually using email (see Communicating with Vendors).

---

**Note**

- Claims appear only after the PO Line – Claiming - Process Automation job has run. (The process must be marked as Active on the Monitor Job page – see Viewing Running Jobs).
- Claims for standing orders are not currently available in Alma.
- When a claim letter is sent for a given month, and the item is never received, if the following month's item also goes into claim, a claim letter can be sent with details for both months. To enable this option, set the claim_continuous_item_level parameter to true.

The following table summarizes when claims are sent to the vendor.

<table>
<thead>
<tr>
<th>PO Line Type</th>
<th>Automatically by Email (if parameter and letter enabled)</th>
<th>Automatically using EDI (if letter enabled)</th>
<th>Manually</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical One-Time</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Physical Continuous</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Electronic</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

When a PO line is overdue, one of the following alerts is generated:

- **Overdue PO line** – The PO line was not received/activated within the expected number of days after placing the order or by the expected receipt/activation date.
- **Open claims exist for this PO line** – The PO line was sent to the claims task list. For one-time physical PO lines (or any PO lines, for vendors that support EDI claims), an email is automatically sent to the vendor, inquiring about the late delivery of the order. Note that the automatic email is sent only once to the vendor. Subsequent communication with the vendor takes place using the Communications tab on the PO Line Summary page (see Communicating with Vendors).
- **<x> items were received out of <y> ordered** (for one-time physical PO lines) – How many items have been received out of the total number ordered. In the Alerts tab, there is a link to the Received Items List (note that you must be within the correct department), which contains a list of all the items in the PO line.
- **No item was received in more than <grace period> days** (for continuous physical PO lines) – The number of days that have passed since an item was received.
- **Electronic resource was not activated** (for electronic PO lines) – The PO line’s electronic resource has not yet been activated. In the Alerts tab, there is a link to the Electronic Resource Activation Task List.

You can edit or update the dates of overdue PO lines. In certain cases, you may also be able to relink, close, or cancel an overdue PO line, or activate an overdue electronic PO line. Most of these actions will remove the claim, either immediately or after the PO Line – Claiming - Process Automation job runs.

For details, see the following sections:
In addition to the collapsible sections that appear at the bottom of the PO lines lists, a second collapsible section appears on the Claims Task List for physical PO lines. The One Time Claiming Information or Continuous Claiming Information sections list the items or holdings linking to the PO line that are claimed. For continuous PO lines, the claim is based on the prediction patterns, if they are enabled. When the PO line is in claim but no actual item is in claim, the section is called the Last Received Item section. For physical one time orders, the list displays all unreceived items linked to this PO Line. The Go to inventory link displays the item editor. For physical continuous orders, the list displays all unreceived items that are under the holdings linking to this PO line, based on the prediction pattern. In this case, if there are items, the Go to inventory link goes to the the item editor, otherwise it goes to the holdings item lists.

Watch the View Unreceived Items for Order Lines with Claims video (1:17 min).

### Updating Dates

You can enter a new expected receipt date or expected activation date from the vendor. Where the same expected date applies to multiple PO lines, the new date can be entered globally for all the applicable PO lines. When a future date is entered:

- Any claim alerts applied to the PO lines are removed.
- The PO lines no longer appear on the Claim page.
- The PO lines are removed from the Order lines with claims link in the task list (see Tasks in the Task List).

**To update dates:**

1. Select whether to update dates globally or individually:
   - To update the expected dates for multiple PO lines that appear on the Claim page, select the check boxes for all PO lines for which you want to update the date and select Change Expected Date.
   - To update the expected dates for an individual PO line on the Claim page, select Change expected date in the row actions list (or update the date by editing the PO line – see Editing PO Line Information).

The Expected Receipt Date (for physical PO lines) or Expected Activation Date (for electronic PO lines) dialog box appears.

![Expected Receipt Date Pop-up Window](image)
2. Select a new date.

3. Optionally, enter any notes in the Note area.

4. Select Save. The expected date is updated and the alerts for the PO lines are removed. Additionally, the PO lines are no longer listed on the Claim page and are removed from your task list.

Watch the Post Receiving Process and Claims video (3:00 mins).
Closing, Reopening, and Relinking PO Lines

The following sections describe actions that you can perform on PO lines from a record list of PO lines (see Searching in Alma), depending on your role, the status of the PO line, the type of PO line, and other factors. For more information about record lists, see Record Lists.

Closing, Canceling, and Deleting PO Lines

The table below compares the actions of closing, canceling, and deleting PO lines.

<table>
<thead>
<tr>
<th>Action</th>
<th>Reason</th>
<th>Available for</th>
<th>Result</th>
</tr>
</thead>
</table>
| Closing PO Lines   | To complete the PO              | • One-time PO lines waiting for invoice payment  
|                    |                                 | • Continuous PO lines waiting for renewal                                     | PO line stored as closed; can be reopened   |
| Canceling PO Lines | Error during PO line processing | Active PO lines that are not  
|                    |                                 | • being evaluated or  
|                    |                                 | • waiting for invoice payment                                                 | PO line stored as canceled, can be reopened |
| Deleting PO Lines  | Clean up system                 | • Closed or canceled PO lines  
|                    |                                 | • Users with Extended roles                                                   | PO line and all related material deleted from Alma |

Closing PO Lines

Closing a PO line is used to indicate that the purchase was completed. The following types of PO lines can be closed:

- One-time PO lines that have been sent (with at least one received or activated resource) and are waiting for invoice payment (these are usually automatically paid, set to Fully Invoiced, and/or closed by the workflow.)
- Continuous PO lines waiting for renewal (when a serial subscription must be stopped, for example).

To close a PO line:

In the record list of PO lines, select Close in the row actions list and select Confirm in the confirmation dialog box.
Canceling PO Lines

Canceling a PO line invalidates the PO line. In certain situations, you may want to cancel a PO line.

When a PO line is canceled:

- It is not removed from Alma. You can still find a canceled PO line on the Search for PO Lines page, using the Find box at the top of the list or the facets on the left side of the page. You can edit or delete notes and attachments in canceled PO lines by selecting the relevant link beneath the PO line (see Editing PO Line Information).
- If the PO line is a main PO line, Alma attempts to delete the PO line’s inventory. Alma does not delete the inventory if the PO line is an additional PO line or if the inventory has been received or activated. If the inventory cannot be deleted, a confirmation message indicates that if the PO line is canceled, the link between the PO line and its inventory will be lost.
- If the PO line has an e-task associated with it, the e-task is deleted.
- The PO line’s encumbrances are released.
- Alma attempts to delete the item and its holdings, if the holdings is then empty. If the bibliographic record is then also itemless, you can define how to handle the record with the pol_handle_childless_bib customer parameter. For more information, see Configuring Other Settings (Acquisitions).

Note

- When closing PO lines, inventory is not deleted. For PO lines associated with electronic resources, a task is added to the electronic activation task list with the following note: The order for this resource was closed. Please check whether deactivation is required.
- When closing PO lines, encumbrances are released.
- Notes and attachments can be added to a PO line even when it is closed.
- To close a PO line with some received and some unreceived items, remove the unreceived items, change the number of items in the PO line, and then re-receive the received items.

To cancel a PO line:

1. In the record list of PO lines, select Cancel in the row actions list. If you have configured a PO line cancellation restriction note, it appears. After you confirm, or if you do not have a note configured, the Cancellation Information dialog box appears.
2. Select the Cancellation reason. To configure the available reasons, see Configuring PO Line Cancellation Reasons.

3. In Cancellation note, enter a note for the vendor, as needed.

   **Note**
   The note details appear in the Notes tab on the PO Line Summary page.

4. Select Send cancellation to vendor to send a cancellation notification to the vendor, as required.

   Cancellation is sent by email unless the vendor is configured for EDI cancellations, in which case cancellation is sent using EDI. If sent by email, the preferred address defined for the vendor is used. For information about EDI, see Electronic Data Interchange (EDI).

5. Select Confirm. The PO line is canceled. If Send cancellation to vendor was selected, the cancellation instruction is sent to the vendor.

   **Note**
   A cancellation instruction is sent to the vendor only if the order was previously sent to the vendor. If the order is still in review, no order was sent to the vendor, and it is therefore not necessary to select Send cancellation to vendor.

---

**Deleting PO Lines**

You can delete a PO line only if you have the **Purchasing Operator Extended** role.

Deleting a PO line removes it from Alma and deletes any transactions associated with the PO line. Deleting a main PO line also deletes inventory resources associated with the PO line; deleting an additional PO line does not delete the inventory.

The **Delete** option is available for PO lines with the following statuses:

- **In Review**
- **Packaging** (Automatic or Manual)
- **Deferred, Canceled, or Closed**

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).
• It is a main PO line and one of the PO line resources was received or activated (even if the PO line is in review)

**Note**

Once a PO line is deleted, it cannot be retrieved or reopened. If there is a chance you will want to view or reuse a PO line, consider canceling it (see Canceling PO Lines above) or closing it (see Closing PO Lines above).

---

**To delete a PO line:**

Select **Delete** in the PO line’s row action list and select **Confirm** in the confirmation dialog box. The PO line is deleted.

For additional information about deleting PO lines, see [Deleting POs](#).

---

**Reassigning and Reactivating PO Lines**

The table below compares the actions of relinking, reassigning, and reopening PO lines.

<table>
<thead>
<tr>
<th>Action</th>
<th>Reason</th>
<th>Available For</th>
<th>Not Available For</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relinking PO Lines</td>
<td>Better bibliographic record exists</td>
<td>PO lines with the status <strong>In Review</strong>, <strong>Deferred</strong>, <strong>Ready</strong>, or one-time <strong>Closed</strong></td>
<td>• Records from the Community Zone</td>
<td>PO line is linked to the better record and its items/holdings are moved under that bibliographic record</td>
</tr>
<tr>
<td>Changing Bibliographic Reference</td>
<td>Better description for record exists</td>
<td>Active PO lines</td>
<td>Canceled PO lines</td>
<td>The PO line assumes a better, more complete description</td>
</tr>
<tr>
<td>Reopening a <strong>Closed</strong> or <strong>Canceled</strong> PO Line</td>
<td>To open a PO line that was closed or canceled (often by mistake)</td>
<td>Closed or canceled PO lines</td>
<td>All other PO lines, including deleted PO lines</td>
<td>Status changes to In Review</td>
</tr>
</tbody>
</table>

---

**Relinking PO Lines**

You 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 unsent 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 Knowledge Base. When this occurs, the **Relink** option does not appear.
• The PO line contains items belonging to two different bibliographic records.

**Note**
A PO line for an electronic item can be relinked only if it has an MMS ID.

**To relink a PO line:**

1. Select **Relink** in the row actions list of the PO line you want to relink.

   A search results page appears with initial information taken from the PO Line (for instance, Title or ISBN, if they exist).

   ![Image of repository search](image)

2. Modify the search as required (see **Searching in Alma**).

3. Select the new resource, select **Confirm** in the confirmation dialog box. The PO line is linked to the new resource. Additionally, the associated holdings and items are also moved to the new bibliographic record.

**Changing a PO Line's Bibliographic Reference**

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, you can select **Change Bib Reference** to update the PO line description to the description of the new version of the record.

**Note**

• This feature is relevant only for title-based PO lines. In addition, it cannot be performed on canceled PO lines.
• This feature is not available for PO lines of type Electronic Collection-Subscription that are linked to a local electronic collection.

For more information concerning changing the bib reference, see the [Change Bib Reference of a PO Line](https://example.com) video (4:38 mins).

**To change the bibliographic record to which a PO line is linked without moving the inventory:**

1. Review for the purchase order lines (**Acquisitions > Purchase Order Lines > Review**). Select **Change Bib**
Reference in the row actions list of the PO line for which you want to change the reference.

2. Select **Confirm** in the confirmation dialog box.

A search results page appears with initial information taken from the PO Line (for instance, Title or ISBN, if they exist).

3. Modify the search as required (see Searching in Alma).

4. Select the new resource (select anywhere in the resource’s line in the list). The PO line’s reference is changed.

Reopening a Closed or Canceled PO Line

To reopen closed or canceled PO lines, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager

PO lines that have been closed or canceled can be reopened and reused.

**Note**

Closed PO lines have completed a full acquisitions workflow (order and payment) and, on completion, have been closed. Canceled PO lines have been started but not completed.

Closed or canceled PO lines can be reopened from the individual PO line or by using an automated process.
To reopen a closed or canceled PO line from the PO line:

Select Reopen in the row actions list of the PO line you want to open. If a closed or canceled PO line does not contain inventory, select Confirm in the confirmation message. When a canceled PO line is reopened, the original fund is removed; you must add a new fund to the PO line. The PO line is been updated with a status of In Review.

To reopen a closed or canceled PO lines in bulk:

Run the Update PO Lines Workflow job. For more information, see Running Manual Jobs on Defined Sets.

For additional information about reopening a closed or canceled PO Line, see the Reopen a Closed/Canceled PO Line video (5:39 mins).
Invoicing

This section includes:

- Invoicing Workflow
- Creating Invoices
- Searching for Invoices
- Reviewing Invoices
- Approving Invoices
- Working with Invoices Waiting for Payment
Invoicing Workflow

The following is an illustration of the invoicing workflow which specifies how an invoice is handled, from the point of its creation to the point at which the invoice is closed. When a PO line is fully invoiced, its associated PO line is closed. If, for some reason, you do not require invoices, use a PO line that does not require a price and funds, such as Technical; see Manually Creating a PO Line.

Watch the Invoicing Workflows video series (4 videos).

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram). For the complete list of invoice statuses, see Invoice Statuses.

1. An invoice is created in one of the following ways:
   - Importing an EDI message from the vendor (see Creating an Invoice by EDI)
   - Importing an Excel file (see Creating an Invoice From a File)
   - Using a PO or manually (see Creating an Invoice From a PO or Manually)
   - After creating an invoice using a PO or manually, you can choose to move directly to the Receive New Material page (see Receiving Material).

Imported invoices are associated with the institution. Invoices created using a PO or manually can be assigned to the institution or a specific library, depending on the scope of the user’s role.
2. The invoice is processed to determine whether there are elements that require special attention based on rules preconfigured by an administrator. This processing is performed automatically by the system.

If there are data issues that require attention, the invoice status is set to In Review and the invoice is sent for review (step 3). For information on this manual activity, see Reviewing Invoices. If there are no data issues and the preconfigured rules determine that the invoice can be processed automatically, the invoice moves to step 4.

- If `invoice_skip_erp = true` on the CustomerParameters Mapping Table page (indicating that the invoice is not to be sent to the ERP; see Configuring Other Settings), the invoice proceeds to the payment stage of the workflow (step 5).
- If `invoice_skip_erp = false` on the CustomerParameters Mapping Table page (see Configuring Other Settings), the invoice is set to Ready to be Paid and proceeds accordingly in the workflow.

If the Prepaid or Internal Copy (that is, the invoice is not exported to the ERP system) payment option was selected during manual invoice creation, the invoice is closed (step 6) when the creator selects Save and Continue (assuming there are no data issues that require attention).

3. The review stage in the workflow enables the reviewer to add missing information to the invoice or correct any incorrect information on the invoice. When the reviewer selects Save and Continue on the Review Invoices page, the invoice returns to step 2 in the workflow, where it is reprocessed to determine whether there are elements that require special attention. If data issues are still present, the invoice returns to review. If all data issues have been resolved, the invoice status is set to In Approval and the invoice proceeds to step 4. Invoices that have been closed or sent to the ERP can be sent back to the review stage, to enable editing of the invoice (see Setting Invoices Back to Review).

4. The invoice is either automatically approved and sent to the next stage of the workflow (Ready to be Paid), or awaits the appropriate library staff person's manual approval before continuing with the workflow.

   1. If the approval rules preconfigured by an administrator determine that the invoice can be approved automatically, the invoice moves to step 5.

   2. If the approval rules preconfigured by an administrator determine that manual approval is required, the invoice is sent for manual approval. For information on this manual activity, see Approving Invoices. When the person performing the manual approval selects Approve on the Invoice Information page (accessed from the Approve Invoices page), the invoice status is set to Ready to be Paid and the approved invoice is ready to be sent to the payment system or ERP. (If the person rejects the invoice, it is returned to the review stage – see step 3).

5. The invoice reaches the payment stage, in which the invoice awaits payment processing, either through Alma or through the institution’s ERP system. (For information on setting up your external system to receive invoices from Alma and running the job that exports invoices from Alma to this external system, see Financial Systems).

   - If the handle_invoice_payment parameter in the Acquisitions Configuration Other Settings menu is set to true, the invoice status is set to Waiting for Payment so that the institution itself can manage the payment of the invoice, either automatically through the import process (see https://developers.exlibrisgroup.com/alma/integrations/finance), or manually by an operator (see Working with Invoices Waiting for Payment).

   - If the handle_invoice_payment parameter in the Acquisitions Configuration Other Settings menu is set to false, the invoice is closed (status Closed) without waiting for payment.

Note

When a negative amount is entered for the invoice’s amount, a refund is granted to the user (see the Total Amount field description in Invoice Details Page Fields).

6. Alma checks whether the PO lines associated with the invoice are fully invoiced and paid. The invoice is then closed (status Closed).

   The PO lines associated with the invoice are closed if they are received/activated and the invoice is closed. If the PO
line’s items are not yet received/activated, they remain open.

---

**Invoice Statuses**

An invoice can have one of the following statuses:

- **In Review** - The invoice was created but not yet reviewed.
- **In Approval** - The invoice is waiting for manual approval.
- **Ready to be Paid** - The invoice was approved and is ready to be sent to the ERP.
- **Waiting for Payment** - The invoice was approved and sent to the ERP (or skipped the ERP if the institution does not use one).
- **Closed** - The invoice is paid and closed.
Creating Invoices

An invoice is created in one of the following ways:

- Importing an EDI message from the vendor (see Creating an Invoice by EDI)
- Importing an Excel file (see Creating an Invoice From a File)
- Using a PO or manually (see Creating an Invoice From a PO or Manually)

Creating an Invoice by EDI

Invoices can be created using EDI when the Invoices check box is selected on the EDI Information tab of the Vendor Details page. For more information, see Electronic Data Interchange (EDI).

Note

- To allow repeated invoice numbers from the same vendor, set the customer parameter invoice_not_unique to true; see Configuring Other Settings (Acquisitions).
- When additional invoice line types are enabled (see Configuring Invoice Line Types), then when an EDI invoice contains both regular and additional charges for a PO line, the additional charges appear as sub-lines of the regular line. The regular line is assigned an integer line number (for example: 2), and the sub-lines are assigned line numbers of the form X.1, X.2, and so forth (for example, 2.1 and 2.2). This keeps related invoice line charges together.

Creating an Invoice From a File

To create an invoice from a file, you must have one of the following roles:

- Invoice Manager
- Invoice Operator
- Invoice Operator Extended

To process receiving the material directly after the invoice is created, you must also have the role of:

- Receiving Operator

Invoices can be created by importing an Excel file, when the From file option is selected on the Select Invoice Creation Process page.

Watch the Creating an Invoice: From a File video (3:00 mins).

---

**Note**

- Imported invoices are associated to the institution
- To allow repeated invoice numbers from the same vendor, set the customer parameter invoice_not_unique to true; see Configuring Other Settings (Acquisitions).
- There is no way to select accrual mode (see Accrual Mode and Working With Accrual Accounting) for invoices created from a file.

---

**To create an invoice from a file:**

2. Select Next. The Invoice From File page appears:

   ![Invoice From File Page](image)

   **Invoice From File Page**

3. In the Vendor field, select a vendor.
4. In the File Type field, select either EDI or Excel.
5. In the Upload File field, select a file on your local system to upload.
6. Optionally, select Download Excel Example and view an Excel example to confirm that your file follows the correct format:

   ![Invoice Example Spreadsheet](image)

   **Invoice Example Spreadsheet**
7. Select **Upload and Run Invoice Creation Job**. A message appears on the Invoice From File page indicating whether the job was successful. When the file is successfully loaded, staff receive an email notification.

8. Select **Monitor Jobs** to view the status of the job. The Monitor Jobs page appears, with the **Completed** tab selected. The job is either **EDI – Load Files <vendor name>** (for an EDI invoice) or **Invoice - Create From Spreadsheet** (for an Excel invoice). For details on the Monitor Jobs page, see **Viewing Completed Jobs**.

---

### Creating an Invoice From a PO or Manually

To create an invoice from a PO or manually, you must have one of the following roles:

- Invoice Manager
- Invoice Operator
- Invoice Operator Extended

To process receiving the material at the same time as creating the invoice manually, you must also have the role of:

- Receiving Operator

If an invoice is not created using an EDI or with the receipt of the ordered material, you can create one, either from the PO using the PO details or by entering the invoice details manually. When creating an invoice from a PO, one invoice line is created for each PO line in the PO with the full PO line price as the invoice line price (fully disencumbered).

Watch the [Creating an Invoice: Manual](#) and [Creating an Invoice: From PO](#) videos.

#### To create an invoice from a PO or manually:

1. On the Select Invoice Creation Process page (**Acquisitions > Receiving and Invoicing > Create Invoice**), select **From PO** or **Manually**.
2. Select the **Handle receiving** check box if you want to process receiving the material directly after the invoice is created.

   **Note**
   You cannot select this option if you are working with accrual accounting. See [Working with Accrual Accounting](#).

3. If you selected **From PO**:

   **Note**
   You cannot select this option if you are working with accrual accounting (because it is not possible to handle all PO lines of the PO in accrual mode—that is, there is no way to automatically split all PO lines among multiple...
1. Select **Next**. The second page of the invoice creation wizard, the Select PO page, opens.

   ![Select PO Page](Image)

   **Select PO Page**

2. Enter or select a PO in the **Select PO** quick pick list.

3. Select **Save**. The Invoice Lines tab on the Invoice Details page appears, displaying an invoice line for each PO line in the PO.

   ![Invoice Details Page – Invoice Lines Tab](Image)

   **Invoice Details Page – Invoice Lines Tab**

   The invoice line fields are filled in automatically and can be edited as required.

   **Note**

   - Invoicing is not required for PO lines with acquisition methods **Gift**, **Depository**, **Technical**, or **Exchange**.

   - The value of the **Line #** field is a link which, when selected, opens the **Invoice Line Details** page for the invoice line.

   - The value of the **PO Line #** field is a link which, when selected, opens the **PO Line Summary** page for the PO line.

   - The value of the **Funds** column is links to the funds. Select a fund name to view transactions related to the invoice in that fund.

4. Select **Save**. The In Review Invoices page appears, displaying the invoices in review.

   ![Image](Image)
If you selected \textbf{Manually}:

1. Select Next. The second page of the invoice creation wizard, the Invoice Details page, appears.

2. Enter the required information, as described in the following table:

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice number (required)</td>
<td>An invoice number for the vendor (can include any keyboard characters and symbols). The number is not unique to a specific vendor. To allow repeated invoice numbers from the same vendor, set the customer parameter \texttt{invoice_not_unique} to \texttt{true}; see Configuring Other Settings (Acquisitions).</td>
<td></td>
</tr>
<tr>
<td>Invoice Date (required)</td>
<td>The invoice date from the Calendar dialog box.</td>
<td></td>
</tr>
<tr>
<td>Vendor (required)</td>
<td>The vendor to whom the invoice is to be issued. When you select a vendor, the list of owners and currency units (in Total Amount) are filtered to display only those that are supported for that vendor.</td>
<td></td>
</tr>
<tr>
<td>Vendor</td>
<td>The vendor account for this invoice.</td>
<td></td>
</tr>
<tr>
<td>Section</td>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>account</td>
<td>The total invoice amount, including shipping (otherwise pro-rated additional charges will miscalculate). Select the currency (the list is predefined by an administrator and restricted according to the selected vendor).</td>
</tr>
<tr>
<td>Total amount (required)</td>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>You can enter a negative amount (with a - sign preceding the number) to indicate a credit. A refund is then granted to the user.</td>
</tr>
<tr>
<td>Vendor Contact Person</td>
<td></td>
<td>The contact person at the vendor dealing with this invoice.</td>
</tr>
<tr>
<td>Payment method</td>
<td></td>
<td>Payment method for the invoice. The available payment methods are:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Accounting department - Use if Alma is connected to an ERP. When this payment method is selected, the <strong>Prepaid</strong> check box in the Payment section is disabled and cannot be selected (see Payment, below)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Cash</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Credit card</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Attachment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Deposit account</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Prepayment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Special payment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Bank transfers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>To configure the methods and the default method, see <a href="#">Configuring the Default Payment Method</a>.</td>
</tr>
<tr>
<td>Invoice reference #</td>
<td></td>
<td>A reference number for the invoice, to enable invoice grouping for reporting.</td>
</tr>
<tr>
<td>Owner (required)</td>
<td></td>
<td>Associate the invoice with the institution or the library. The institution and/or libraries available in the drop-down box depend on your scope. See the <a href="#">Support for Library-Level Invoicing</a> video (3:23 mins) for details about library-level invoices.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When you select an owning library, the list of vendors is filtered to display only vendors available for that library. In addition, only PO lines owned by this library can be added to an invoice line for this invoice.</td>
</tr>
<tr>
<td>Additional Charges</td>
<td>Use Pro rata</td>
<td>Prorate the following additional charges over all invoice lines:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Shipment amount</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Insurance amount</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Overhead amount</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Discount amount</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Any additional charge types and amounts enabled for your institution. See <a href="#">Configuring Invoice Line Types</a>. If you have enabled multiple additional line types, each time you select one of the line types from the Additional Charge drop-down,</td>
</tr>
</tbody>
</table>
another **Additional Charge** drop-down appears. You can add up to five types of additional lines.

If you select **Use pro rata**, the above amounts are not displayed individually on the invoice, and their values are distributed among the invoice lines.

If you do not select **Use pro rata**, each additional charge is displayed as an individual invoice line.

This option is selected by default if the `invoice_use_pro_rata` setting is set to **True** (see Configuring Other Settings).

---

### Note

If VAT is entered for this invoice, and the vendor is noted as liable for VAT, and the institution has an associated governmental vendor, a separate invoice is created for this tax and linked to this invoice. The linked invoice includes only the VAT. For details on configuring liability for tax and a governmental vendor, see step 2 and step 5 in To add a vendor and vendor account; See also How Alma Handles VAT Payments.

After this invoice is paid/exported, the governmental invoice is also paid/exported and appears on the Find Invoices page with the name `<invoice number>_<RT>`, where `<invoice number>` is this invoice’s number and `_RT` stands for Report Tax (the governmental invoice).

---

<table>
<thead>
<tr>
<th>VAT</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>VAT per invoice line</td>
<td>Report tax</td>
<td>Report a use tax (VAT). This field appears only if a governmental vendor is linked to the invoice’s vendor. When selecting this field, the <strong>VAT %</strong> and <strong>Amount</strong> fields are disabled, and any values in these fields revert to 0.</td>
</tr>
<tr>
<td>VAT</td>
<td>VAT code</td>
<td>A VAT code to assign a preconfigured VAT percentage to the invoice. Appears only when VAT codes are configured (see Configuring VAT Codes). Select Update Amount to apply the selected VAT code onto the invoice. Appears only when VAT codes are configured (see Configuring VAT Codes).</td>
</tr>
<tr>
<td>VAT</td>
<td>VAT %</td>
<td>The VAT % of the invoice total amount – inclusive, exclusive, or line exclusive. When a value is added, an amount is automatically calculated and appears in the <strong>Amount</strong> field. For details on configuring the VAT fields, see VAT Calculation – Example. When a VAT Code is configured and the <strong>VAT code</strong> field appears, this field is disabled and fills automatically when the VAT code is selected. For details on configuring VAT codes, see Configuring VAT Codes.</td>
</tr>
</tbody>
</table>
| VAT | VAT Type | Select: 
- **Inclusive**: The invoice total amount includes VAT. 
- **Exclusive**: VAT is added above the invoice total amount. |
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line Exclusive</td>
<td>The invoice's total amount includes VAT (similar to Inclusive), but the VAT amount is calculated outside of the invoice lines' total value and is not factored into the individual invoice lines. For details on these options, see VAT Calculation – Example, below.</td>
</tr>
<tr>
<td>Amount</td>
<td>The amount of VAT to be paid on the invoice – inclusive, exclusive, or line exclusive. When a value is added, a VAT percentage is automatically calculated and appears in the VAT % field. When a VAT Code is configured and the VAT code field appears, this field is disabled and fills automatically when the VAT code is selected (based on the VAT code's percentage and the invoice's total amount). For details on configuring VAT codes, see Configuring VAT Codes.</td>
</tr>
<tr>
<td>Expended from fund</td>
<td>Whether the VAT amount is to be expended from the invoice line's fund. Clear to indicate that the VAT amount is to be expended from a separate fund (Adjustment invoice line type).</td>
</tr>
<tr>
<td>Vendor tax (local currency)</td>
<td>Where relevant, enter a note to indicate that the VAT is charged in the local currency and the invoice itself is in a foreign currency. This field is for informational purposes only.</td>
</tr>
<tr>
<td>Explicit Ratio</td>
<td>You can specify a fixed exchange rate for the invoice amount to the currency used in the fund. By default, Alma calculates the value of the transaction based on the exchange rate on the date specified in Invoice Date.</td>
</tr>
<tr>
<td>Foreign currency</td>
<td>The currency for which you want to set a fixed exchange rate (the currency of the fund).</td>
</tr>
<tr>
<td>Explicit ratio</td>
<td>The exchange rate to use for the invoice amount. For example: - Invoice currency is USD - Fund currency is EUR - Explicit ratio is 1.5 If you add an invoice line of 10 USD but attach it to a EUR fund, the fund displays a transaction of 10 x 1.5 = 15 EUR. Select Add to add the exchange rate to the invoice.</td>
</tr>
<tr>
<td>Note</td>
<td>When payments are made by the ERP for invoices that are closed or waiting for payment, the ERP rate is used if it is better than the rate specified in the Explicit Ratio section. The explicit ratio can contain up to six decimal places. The explicit ratio is exported to the ERP system when the Use xsd format setting is enabled in General configuration (see Import/Synchronize/Export User Blocks/Export Users Fields).</td>
</tr>
</tbody>
</table>
3. If you selected the **Prepaid** or **Internal copy** check box, enter the required information, as described in the following table:

### Additional Prepaid Payment Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export to ERP</td>
<td>Send the invoice to the Enterprise Resource Planning (ERP) system for notification purposes.</td>
</tr>
<tr>
<td>Note</td>
<td>This field is displayed only when the <code>exportPrepaidInv</code> parameter is set to <strong>True</strong> (see Configuring Other Settings). If this field is not displayed, contact your Acquisitions Administrator.</td>
</tr>
<tr>
<td></td>
<td>If you selected <strong>Internal copy</strong>, this field cannot be selected and the invoice cannot be exported to the ERP.</td>
</tr>
<tr>
<td>Payment status</td>
<td>The relevant payment status:</td>
</tr>
<tr>
<td></td>
<td>▪ Not paid</td>
</tr>
<tr>
<td></td>
<td>▪ Paid</td>
</tr>
<tr>
<td>Payment date</td>
<td>The date of the payment. The current date is selected by default.</td>
</tr>
<tr>
<td>Payment Identifier</td>
<td>An external reference number from the ERP system, used to indicate that the invoice was paid.</td>
</tr>
<tr>
<td></td>
<td>If there is no integration with an external system, you can enter an invoice or check number in this field.</td>
</tr>
<tr>
<td>Payment amount (required)</td>
<td>The final amount that was paid (after exchange rates and so forth are taken into account). You can also select the currency for the amount, in the field to the right of this field.</td>
</tr>
<tr>
<td></td>
<td>Entering a negative number in this field indicates a credit amount.</td>
</tr>
</tbody>
</table>

4. Select **Save and Create Invoice Lines**. The Invoice Lines tab on the Invoice Details page appears, enabling you to add invoice lines to the invoice.
5. Select **Edit** in the row actions list for an invoice line for which you want to assign a fund (see the next step for adding an invoice line). The Invoice Line Details page appears:

![Invoice Details Page – Invoice Lines Tab](image)

**Note**

If you selected the **Handle receiving** check box in step 2, the **Save** and **Save and Continue** buttons on the Invoice Lines List page are replaced with a **Save and Go to Receiving** button. Select **Save and Go to Receiving** to open the Receive New material page to receive new material. Ensure that you are at a Receiving Department; see **The Persistent Menu**.

6. Select the checkbox next to each of the invoice lines to add a fund. Select the **Add/Replace Selected Fund** action and select a fund to assign the invoice line. Select **Add Fund**. The fund appears in the **Funding** section.

![Invoice Line Details Page – Create Invoice Manually](image)

**Note**

Closed PO lines can be included in the invoice. To find a closed PO line, select the quick pick link next to the **PO Line** field and set the filter to **All**.

7. Modify any other information as required, and select **Save**. The invoice line information is saved and both disencumbrance (an amount up to but not more than the encumbrance amount) and expenditure transactions are created for the relevant funds. Note that if the invoice lines and PO lines use different funds, the disencumbrance transaction is created for the PO line fund and the expenditure transaction is created for the invoice line fund. If there are multiple funds for an invoice, all of the funds appear in the table.

---

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8. Repeat step e through step f for any additional invoice lines you want to add to the invoice from the Invoice Lines List page.

5. If you want to manually add an invoice line to the invoice: Alma checks each invoice line you add and displays the status — Ready to be paid or In Review.

An invoice can move to the next step in the workflow only if all of its invoice lines have the status Ready to be paid. If mandatory information is missing for an invoice line, it has the status In Review.

From the list of invoice lines, you can edit or delete the invoice line:

**Note**

The Delete option is enabled only if you have the Invoice Operator Extended role.

1. Select Add Invoice Line. The Add Invoice Line dialog box appears.
2. Enter the required information in the dialog box, as described in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The type of invoice line to create:</td>
</tr>
<tr>
<td></td>
<td>▪ Regular</td>
</tr>
<tr>
<td></td>
<td>▪ Other</td>
</tr>
<tr>
<td></td>
<td>▪ Shipment</td>
</tr>
<tr>
<td></td>
<td>▪ Insurance</td>
</tr>
<tr>
<td></td>
<td>▪ Discount</td>
</tr>
<tr>
<td></td>
<td>▪ Overhead</td>
</tr>
<tr>
<td></td>
<td>▪ Any additional type enabled for your institution. See Configuring Invoice Line Types. The Regular type refers to regular invoice lines. All other types are additional charges.</td>
</tr>
<tr>
<td></td>
<td>Discount is subtracted from the value. A negative number is allowed; this is useful for when you return an item that had a discount (so the returned discount is added to the value).</td>
</tr>
<tr>
<td></td>
<td>If you selected Pro rata when you created the invoice (see step b), the additional charges are pro-rated against all invoice lines, and only the Regular and Other types are available.</td>
</tr>
<tr>
<td></td>
<td>If you did not select Pro rata, the additional charges are not allocated to a specific invoice line.</td>
</tr>
<tr>
<td>Line number</td>
<td>The invoice line number.</td>
</tr>
<tr>
<td>PO line</td>
<td>A PO line to link to the invoice line. The fields in the Add Invoice Line dialog box are updated, depending on the type of PO line selected (one-time or continuous).</td>
</tr>
<tr>
<td></td>
<td>Note</td>
</tr>
<tr>
<td></td>
<td>The amount that was previously encumbered in the PO line’s funds is disencumbered when the invoice line is added.</td>
</tr>
<tr>
<td>Title</td>
<td>The title of the selected PO line.</td>
</tr>
<tr>
<td>PO line price</td>
<td>The price of the selected PO line. If this value is less than 1, enter a leading 0. For example, 0.44, not .44. The price is in the currency selected in the PO line.</td>
</tr>
<tr>
<td>Fully invoiced (one time PO</td>
<td>Whether the PO line is fully invoiced. This creates a disencumbrance transaction for any encumbered amounts. See Invoice Status in Manually Creating a PO Line.</td>
</tr>
<tr>
<td>line only)</td>
<td></td>
</tr>
<tr>
<td>Check subscription date</td>
<td>Whether Alma checks if the subscription date overlaps with those of any other lines. If you select this option and an overlapping subscription is detected, an alert message appears when creating the invoice line.</td>
</tr>
<tr>
<td>date overlap (continuous</td>
<td></td>
</tr>
<tr>
<td>PO lines only)</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| **Note** | - Alma checks all invoice lines linked to the same PO for overlap.  
- Alma can check only already saved information - invoice lines in other invoices, and previously added invoice lines from this invoice if you are editing the invoice. Invoice lines you are currently adding are not checked for overlap with other invoice lines you are currently adding. Use the list of invoices lines (see Invoice / Invoice line number list, below) to check for overlaps before saving. |
| Additional information (continuous PO lines only) | Notes, as required. Required if the Subscription from date and Subscription to date fields are empty |
| **Accrual mode** (continuous PO lines only) | Whether to enable accrual of invoice expenditures from one fiscal period to another, in institutions that practice accrual accounting.  
Appears only when acquisition_accrual_mode=true in the CustomerParameters Mapping Table (see Configuring Other Settings). When a continuous PO line is selected in the PO line field, this check box is selected.  
For details on working with accrual accounting, see Working With Accrual Accounting. |
<p>| PO Line Subscription from date (continuous PO lines only) | The subscription from date for the PO line. |
| PO Line Subscription to date (continuous PO lines only) | The subscription to date for the PO line. |
| Subscription from date (continuous PO lines only) | The date from which the invoice line is covered. Required if Check subscription date overlap is selected |
| Subscription to date (continuous PO lines only) | An end date for the invoice line. Required if Check subscription date overlap is selected |
| Invoice / Invoice line number list | For continuous PO lines, this list includes the last five regular invoice lines associated with this PO line and the dates associated with each invoice line. |
| Price | The price and currency for the invoice line. Enter the invoiced amount as it appears on the invoice for this line item. If this value is less than 1, enter a leading 0. For example, 0.44, not .44. |
| Price Note | A free text note that is displayed in the invoice line details, the invoice line list, and the Excel export. |</p>
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Release remaining encumbrance| Whether to create a disencumbrance transaction to release encumbrance amounts that remain after paying an invoice. Appears only when a continuous PO line is selected. If encumbered amounts exist for multiple funds after an invoice is paid, a disencumbrance transaction is created for each fund that has encumbered amounts remaining.  
  **Note**  
  This option can be selected only when the total invoice line price is lower than the PO line price. It can be changed any time the invoice line is in an editable state.  
  While this field appears whether creating an invoice manually or from a PO, when creating an invoice from a PO, the remaining encumbrance is automatically released. Selecting this field is only applicable when creating an invoice manually. |
| Quantity                     | The quantity for the invoice line. This field records the number of invoiced items, but its value does not affect any calculations.                                                                          |
| Reporting code               | The primary, secondary, and tertiary report codes — select from the predefined drop-down lists. For more information on these codes, see [Configuring Reporting Codes](#).                                                                |
| VAT Note                     | A read-only field that displays information on the VAT. The text displayed here appears in the VAT Note column on the Invoice Lines tab of the Invoice Details page.                                             |
| Note                         | Notes you want associated with the invoice line.                                                                                                                                                           |
| Additional information       | Descriptive information to be added (optional), providing additional scope information on the invoice line. Displayed only when the invoice line is connected to a continuous PO line.                              |
| VAT code                     | A VAT code to assign a pre-configured VAT percentage to the invoice line. Displayed only when VAT codes are configured (see [Configuring VAT Codes](#)).                                                            |
| Update amount                | Whether to invoke the selected VAT code onto the invoice line. Displayed only when VAT codes are configured (see [Configuring VAT Codes](#)).                                                                     |
| VAT %                        | The percentage of the invoice line price that is VAT. Appears only when VAT per invoice line is selected on the Invoice Details page. When a value is added, the VAT amount is calculated automatically and is displayed in the Amount field.  
  When VAT codes are configured, this field is disabled (see [Configuring VAT Codes](#)).                                                      |
| Amount                       | The amount of VAT to be paid on the invoice line. Displayed only when VAT per invoice line is selected on the Invoice Details page. When a value is added, the VAT percentage is calculated automatically and is displayed in the VAT % field.  
  When VAT codes are configured, this field is disabled (see [Configuring VAT Codes](#)).                                                              |
Field | Description
--- | ---
Fund information - Select **Add Fund**. Enter the following fund information and select **Add Fund** to add the fund to the invoice line.

| Field | The name of the fund. When the invoice line is saved, both disencumbrance (in the amount of the PO line encumbrance) and expenditure transactions are created for all the selected funds. Disencumbrances are created only for PO line funds, and only one disencumbrance is created for each encumbrance (and not for each expenditure). The disencumbrance date is set to five milliseconds before the encumbrance date, so that they appear together in the list of invoice lines. If an amount other than 100% of an invoice line’s total is allocated to funds, select **Redistribute Lines** to re-allocate the fund amount percentages, based on each fund’s respective amount relative to the new total amount. **Note** If the invoice line and PO line use different funds, the disencumbrance transaction is created for the PO line fund and the expenditure transaction is created for the invoice line fund. Funds with a negative balance (or a balance of 0) appear only if there is a rule configured allowing overexpenditure and the overencumbrance limit has not been reached. For details on the fields used for configuring rules, see **Ledger Rules**.

| Percent | The percent allocation for the fund selected in the **Fund** field. If an amount other than 100% of an invoice line’s total is allocated to funds, select **Redistribute Lines** to re-allocate the fund amount percentages, based on each fund’s respective amount relative to the new total amount.

3. Select **Add** to add the current invoice line and leave the dialog box open to add another invoice line, or select **Add and Close** to add the invoice line and close the dialog box. The invoice line is added to the Invoice Lines List page.

   - **Edit** – Select **Edit** in the row actions list to edit the line. The Invoice Line Details page appears, where you can edit the invoice line information. The Invoice Line Details page also enables you to view details of the PO line with which you associated the invoice line. When you have edited the invoice line as required on this page, select **Save**. You are returned to the Invoice Lines List page, where you can view the invoice line you edited.

   - **Delete** – Select **Delete** in the row actions list and select **Confirm** in the confirmation dialog box to delete an invoice line.

**Note**
Deleting an invoice removes the corresponding expenditure and recalculates the disencumbrance. To remove the disencumbrance (when removing the only invoice associated with the PO line), manually set the PO line’s **Invoice Status** to **Partially Invoiced** (see **Manually Creating a PO Line**).

6. In the **Alerts** tab, view any alerts that the system may have generated for the invoice when it is saved. If necessary, edit the invoice accordingly, based on the alerts.
Alerts that may be generated include:

- Some invoice lines are not ready – One or more invoice lines in a saved invoice are missing information
- Some invoice lines are not linked to PO lines – One or more invoice lines are not linked to a PO line
- The invoice total amount entered is different than the calculated total net invoice

7. In the **Notes** tab, add, update, or delete notes for the invoice. For details, see [Notes Tab](#).

8. In the **History** tab, you can view changes made to the invoice or any invoice line fields, including the date and time of the change, the user who made the change, the invoice line number (for invoice lines), and the old and new values. For more information about invoice line audit history, see the [Invoice Line Audit History](#) video (0:49 mins).
   - To see invoice line history, select **Invoice line changes** in the **History type** field.
   - To see invoice history, select **Invoice changes** in the **History type** field.
   - For more information about this tab, see [History Tab](#).

9. In the **Attachments** tab, add, update, or delete attachments for the invoice. For details, see [Attachments Tab](#).

10. Select one of the following buttons:
    - If you did not select the receiving check box in step 2, you can:
      - **Save** – The invoice information you entered is saved and the invoice is moved to the Review Invoices page, where you can review and edit it. The invoice does not continue to the next stage of the invoicing workflow.
      - **Save & Continue** – The invoice information you entered is saved and the invoice continues to the next stage of the invoicing workflow, where it is automatically processed. For more information on the invoicing workflow, see [Invoicing Workflow](#).
    - If you selected the **Handle receiving** check box in step 2, you can:
      - **Save and Go to Receiving** – The invoice information you entered is saved (and remains in review) and the Receive New Material page opens, enabling you to receive the new material (see [Receiving Material](#)).

---

**VAT Calculation – Example**

The following example illustrates how the VAT-related fields operate.

This example assumes that an invoice has a total amount of $100. The invoice contains two invoice lines, one for $40 and the other for $60.

With no VAT, the invoice’s **Summary** tab is as follows:
Total Amount is 100. Total Invoice Lines Amount is 100, which is the sum of the invoice lines (40 + 60). VAT Amount is 0.

The Invoice Lines tab is as follows:

Invoice Lines – No VAT

The Price of each line is the same as the Total Price of each line, and no comment appears in the VAT Note column.

Now assume we enter a VAT % of 10.

- If Inclusive is selected (total amount includes VAT), this indicates that the VAT is already figured into the total value of each invoice line. The VAT Amount is configured as $9.09 (100 - 100/1.1 = 9.09). The invoice’s Summary tab is as follows:
Total Amount is 100. Total Invoice Lines Amount is 100, which is the sum of the invoice lines (40 + 60). VAT Amount is 9.09.

The Invoice Lines tab is as follows:

The Price of each line is the same as the Total Price of each line. A comment appears in the VAT Notes column, indicating the amount of VAT calculated for that line.

- Invoice Line 1 – Price = $40 (36.36 + 3.64 (VAT))
  - If Expended from fund is selected: All $40 is expended from the invoice line’s fund, and the VAT note displays $3.64 included in the line’s total price.
  - If Expended from fund is not selected: $36.36 is expended from the invoice line’s fund, and $3.64 is included in the VAT Adjustment line (a total of $9.09 is taken from both lines).

- Invoice Line 2 – Price = $60 (54.55 + 5.45 (VAT))
  - If Expended from fund is selected: All $60 is expended from the invoice line’s fund, and the VAT note displays $5.45 included in the line’s total price.
  - If Expended from fund is not selected: $54.55 is expended from the invoice line’s fund, and $5.45 is included in the VAT Adjustment line (a total of $9.09 is taken from both lines).

- If Exclusive is selected, then the total invoice amount does not include VAT. VAT is added to each invoice line but not reflected in the total invoice amount. The VAT Amount is configured as $10 (10% of $100).
The invoice’s **Summary** tab is as follows:

![Invoice Summary](image)

**Invoice Summary – VAT Exclusive**

**Total Amount** is 100. **Total Invoice Lines Amount** is 110, which is the sum of the invoice lines (44 + 66). **VAT Amount** is 10.

The **Invoice Lines** tab is as follows:

![Invoice Lines](image)

**Invoice Lines – VAT Exclusive**

The **Price** of each line is less than the **Total Price** of each line, which includes the VAT. A comment appears in the **VAT Notes** column, indicating the amount of VAT calculated for that line.

- Invoice Line 1 – Price – $40 + 4 (VAT) = $44
  - If **Expended from fund** is selected: All $44 is expended from the invoice line’s fund, and the VAT note displays $4.00 included in the line’s total price.
  - If **Expended from fund** is not selected: $40 is expended from the line’s fund, and $4 is included in the VAT Adjustment line (an adjustment of $10 is taken from both lines).

- Invoice Line 2 – Price – $60 + 6 (VAT) = $66
  - If **Expended from fund** is selected: All $66 is expended from the invoice line’s fund, and the VAT note displays $6.00 included in the line’s total price.
  - If **Expended from fund** is not selected: $60 is expended from the line’s fund, and $6 is included in the VAT Adjustment line (an adjustment of $10 is taken from both lines).
• If **Line Exclusive** is selected, the invoice’s total amount includes the VAT (similar to **Inclusive**), but the invoice line’s prices do not. The VAT **Amount** is calculated against the invoice’s **Total Value**. In our example, this does not reflect the actual total of the invoice lines + VAT. The VAT **Amount** is configured as $9.09 ($100 - 100/1.1 = 9.09), which is incorrect.

The invoice’s **Summary** tab is as follows:

![Invoice Summary – VAT Line Exclusive](image)

**Total Amount** is 100. You should adjust the values of the invoice lines or the **Total Amount**, since **Total Amount** does not accurately reflect the total value of the invoice lines + VAT. **Total Invoice Lines Amount** is 110, which is the sum of the invoice lines + VAT (44 + 66). VAT **Amount** is 9.09. If you adjust the **Total Amount** to 110, VAT **Amount** will correctly appear as 10.

The **Invoice Lines** tab is the same as it is if **Exclusive** is selected (see above).

- **Invoice Line 1** – Price = $40 + 4 (VAT)) = $44
  - If **Expended from fund** is selected: All $44 is expended from the invoice line’s fund, and the VAT note displays $4 included in the line’s total price.
  - If **Expended from fund** is not selected: $40 is expended from the line’s fund, and $4 is included in the VAT Adjustment line (an adjustment of $10 is taken from both lines).

- **Invoice Line 2** – Price = $60 + 6 (VAT)) = $66
  - If **Expended from fund** is selected: All $66 is expended from the invoice line’s fund, and the VAT note displays $6 included in the line’s total price.
  - If **Expended from fund** is not selected: $60 is expended from the line’s fund, and $6 is included in the VAT Adjustment line (an adjustment of $10 is taken from both lines).

---

**Working With Accrual Accounting**

For institutions that practice accrual accounting, you can accrue invoice expenditures from one fiscal period to another.
When accrual accounting is not used, if an invoice overlaps two different fiscal periods, the entire invoice amount is attributed to the current fiscal period — that is, the fiscal period in which the current calendar date is contained. When accrual mode is enabled in Alma, invoice amounts are spread out over all active fiscal periods, beginning with the fiscal period in which the Subscription from date is contained.

For example:

• A fiscal year is set in Alma that runs from January 1, 2014 – December 31, 2014, called FY - 2014.
• Another fiscal year is set in Alma that runs from January 1, 2015 – December 31, 2015, called FY - 2015.

An invoice covers the fiscal period from June 1, 2014 – May 31, 2015. This means that 54.55% of the invoice’s fiscal period is in FY – 2014, and 45.45% of the invoice’s fiscal period is in FY – 2015.

• If Accrual Mode is disabled: All of the invoice’s charges are attributed to the current fiscal year (FY – 2014), regardless of the invoice’s Subscription from date value.
• If Accrual Mode is enabled: The invoice’s charges are distributed proportionally between FY – 2014 and FY – 2015.

Note

For accrual accounting to work properly, all the past and future fiscal periods must be defined, and the funds must be active and able to accept transactions. If a future fiscal year is not active in Alma (or if the fund does not exist), the invoices’ expenditures are attributed to the latest active fiscal period in Alma that is covered by the invoice. In the above example, if FY – 2015 was not active, all of the invoice’s expenditures would be attributed to FY – 2014, even if accrual mode is enabled.

• If the Subscription from date is not part of the previous, current, or next fiscal period, you will receive an error that the fund is not valid in accrual mode.

Accrual accounting takes effect only on expenditures, and not on encumbrances.

To enable working with accrual accounting, ensure that the parameter acquisitions_accrual_mode is enabled (see Configuring Other Settings).

To enable accrual mode for an invoice line:

1. Ensure that acquisitions_accrual_mode is enabled (see Configuring Other Settings).
2. Ensure that you have rolled over the ledger and the required fund from the first fiscal year to all required fiscal years (see Rolling Over Legders).

Configure the fund to accept expenditure transactions prior to (or later than) the start of (end of) the fiscal period. To do this, ensure that you have selected a value (such as 365) in the Expenditures prior to fiscal period (days) field in the Rules section of the Summary Details page for the specified fund (see the table Ledger Rules in Adding a Legder).

For Alma to automatically distribute the amounts to the funds in each fiscal year (see below), all funds in the different fiscal years must have the same fund code. (If you choose allocate amounts manually, in which case the fund codes do not matter.)
3. On the Invoice Details Page (Acquisitions > Receiving and Invoicing > Create Invoice, select Manually and select Next), configure the relevant fields to create an invoice.

4. Select Save and Create Invoice Lines. The Invoice Lines tab of the Invoice Details page appears.

5. Select Add Invoice Line. The Add Invoice Line dialog box opens.

6. In the PO line field, select a continuous PO line. The dialog box refreshes with the Accrual Mode check box selected.
7. In Subscription date range, select a starting date and ending date for the invoice line, respectively. The distribution of the expenditures among the relevant fiscal periods appears.

The above figure presents an example where 19.87% of the invoice line’s expenditures fall in the fiscal period ending 06/29/2016, and 80.13% of the invoice line’s expenditures fall in the fiscal period ending 06/29/2017.
8. Select **Add Fund** to add a fund and enter the relevant information.

### Note

- You must configure the fund to accept expenditure transactions prior to (or later than) the start of (end of) the fiscal period. Ensure that you have selected a value (such as 365) in the **Expenditures prior to fiscal period (days)** field in the **Rules** section of the Summary Details page for the specified fund (see the table **Ledger Rules** in **Adding a Ledger**).

- For Alma to automatically distribute the amounts to the funds in each fiscal year, select a fund that has a matching fund (with the same fund code) in each fiscal year required for the invoice. If there are any fiscal years that do not have funds, then the fund associated with the latest fiscal year is assigned the remaining balance of the invoice. For example, if you want to spread the invoice over three years, 10% the first year, 60% the second year, and 30% the third year, but the fund you select only exists in the first two fiscal years, then the first year’s fund will cover 10% and the second year’s fund will cover 90%.

- Alternately, you can simply add the funds you require and manually assign the amounts to each one, as required.

9. Select **Add Fund**. The accrued amounts appear in the **Accrued Amount** column, according to the displayed percentages (as described in step 7 above).

![Add Invoice Line Dialog Box – Accrued Amounts](image)

The fund that covers the Fiscal Period in the **Subscription from date** is called the Baseline Fund. **Delete** appears next to this fund only. Selecting **Delete** deletes both accrued amounts covered by this fund.

10. To disable accrual mode, clear the **Accrual Mode** check box. The amounts then exist independently in the invoice line, and **Delete** appears next to each. Additionally, the **Accrued Amount** heading changes to **Amount**.

11. Select **Add and Close**.
Searching for Invoices

To search for invoices, you must have one of the following roles:

- Invoice Manager
- Invoice Operator
- Invoice Operator Extended
- Purchasing Manager
- Purchasing Operator

You can see only invoices associated with the scope assigned to your role.

You search for invoices using the persistent search box (see Searching in Alma).

Search results for invoices (see Searching in Alma) appear on a results page.

You can locate specific invoices using the facets (Limit results to) on the left side of the page.

The following facets are available:

- **Status** – The status of the invoice. You can also search for invoices with a specific status using the following search strings:
  - **Closed** – Search for **closed**
  - **In Approval** – Search for **inapproval**
  - **In Review** – Search for **inreview**
  - **Ready to be paid** – Search for **waiting to be sent**

  These invoices will be processed by the next ERP Export job. For more information, see Financial Systems.

- **Waiting for Payment** – Search for **ready to be paid**

  These invoices were processed by the ERP Export job and are now waiting for the payment step to be handled.

- **Alert** – The type of alert for the invoice—for example, Additional invoice lines are Linked to the same PO line,
Currency different from PO, and Invoice with the same number exists

- **Vendor** – The vendor to which the invoice must be paid
- **Source** – The mode by which the invoice was created (from a file, from an EDI, from a PO, or manually)
- **Owner** – The institution or the library associated with the invoice

The Find Invoices page displays the following columns for each invoice.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice #</td>
<td>The number of the invoice</td>
</tr>
<tr>
<td>!</td>
<td>The number of alerts for the invoice</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the invoice</td>
</tr>
<tr>
<td>Vendor</td>
<td>The vendor to which the invoice is to be sent</td>
</tr>
<tr>
<td>Owner</td>
<td>The institution or the library associated with the invoice</td>
</tr>
<tr>
<td>Creation From</td>
<td>The method by which the invoice was created</td>
</tr>
<tr>
<td>Creation Date</td>
<td>The date on which the invoice was created</td>
</tr>
<tr>
<td>Last Updated Date</td>
<td>The date of the invoice’s most recent update</td>
</tr>
<tr>
<td>Total Price</td>
<td>The total price of the invoice</td>
</tr>
<tr>
<td># of lines</td>
<td>The number of PO lines to be included in the invoice</td>
</tr>
</tbody>
</table>

To view an invoice, select View in the row actions list. The Invoice Details page opens. The fields on this page cannot be edited.

To navigate to the list of invoices that are in review, select Go to task list in the row actions list. The In Review Invoices page opens (see Reviewing Invoices).
Reviewing Invoices

To review invoices, you must have one of the following roles:

- Invoice Operator
- Invoice Operator Extended
- Invoice Manager

You can review only invoices associated with the scope assigned to your role.

An invoice is sent for manual review in any of the following scenarios:

- There are data issues or alerts—as a result of the invoice processing stage of the invoicing workflow—that require the attention of a library staff person AND the invoice review rules indicate that the invoice should go to review. See Configuring Invoice Review Rules.
- **Save** (as opposed to **Save and Continue**) is selected at the end of the manual invoice creation process. See Creating an Invoice from a PO or Manually.

Review Within the Invoicing Workflow

Invoices appear on the In Review Invoices page (Acquisitions > Receiving and Invoicing > Review). You can also view this page starting on a specific tab by selecting one of the following tasks in the Tasks List in the persistent menu (see Tasks in the Task List):

- Invoices - review - assigned to you
- Invoices - review - without assignment
In Review Invoices Page

This page is a task page. On this page you can edit or delete an invoice, or change who an invoice is assigned to.

Invoices appear in the following tabs (see Assigned to Me, Unassigned, Assigned to Others Tabs):

- **Assigned to Me** — Only you can edit these invoices.
- **Unassigned** — You or any other staff person with review permissions can edit these invoices.
- **Assigned to Others** — Only the user assigned to the invoice can edit it, unless it is reassigned to someone else.

To edit an invoice:

1. On the In Review Invoices page, select **Edit** in the row actions list for an invoice. The Invoice Details page appears.

![Invoice Details Page](image)

2. View the alerts generated for the invoice in the **Alerts** tab and modify the information in each of the other tabs, as required.

   For information on the fields in each of these tabs, see Creating an Invoice From a PO or Manually.

3. Select **Save and Continue** to save your changes and move the invoice to the processing stage of the invoicing workflow.

   If you select **Save**, your modifications are saved, but the invoice does not move to the next stage of the workflow.

   If the invoice data has been properly modified, the invoice continues to move through the invoicing workflow as described in Invoicing Workflow.

You can also perform invoice management tasks on the Waiting for Approval Invoices page (Acquisitions > Receiving and Invoicing > Approve), as described in the referenced procedures:

- Change an invoice assignment - Select **Release assignment** in the row actions list for an invoice. The invoice is unassigned to and moved to the **Unassigned** tab.
- Release an invoice assignment - Select **Assign to** in the row actions list for an invoice. The reassignment dialog box opens. See Assigned to Me, Unassigned, Assigned to Others Tabs.
- Delete an invoice - Select **Delete** in the row actions list for an invoice and select **Confirm** in the confirmation dialog box. The associated expenditures are deleted and the encumbrances for the related POs are recalculated.
Note

You can delete an invoice only if you have been assigned the Invoice Operator Extended role.
Approving Invoices

To approve invoices, you must have the following role:

- Invoice Manager

You can approve only invoices associated with the scope assigned to your role. You can delete an invoice only if you have been assigned the **Invoice Operator Extended** role.

If the approval rules pre-configured by an administrator determine that manual approval for invoices is required under certain circumstances, the invoice is sent for manual approval when the specified criteria are met. This approval set is skipped if an invoice approval rule indicates to do so; see **Configuring Invoice Approval Rules**.

Invoices are approved on the Waiting for Approval Invoices page (**Acquisitions > Receiving and Invoicing > Approve**). You can also view this page starting on a specific tab by selecting one of the following tasks in the Tasks List in the persistent menu (see **Tasks in the Task List**):

- Invoices - approval - assigned to you
- Invoices - approval - without assignment

To manually approve invoices:

1. On the Waiting for Approval Invoices page, locate the invoices that you want to approve.
2. Select **Actions > Edit** for the invoice you want to approve. The Invoice Details page appears.

![Invoice Details](image)

3. Modify the information in each tab as required. For information on the fields in each of these tabs, see *Creating an Invoice From a PO or Manually*.

4. Select one of the following:
   - **Approve** – The invoice is waiting to be paid and proceeds to the payment stage of the workflow. For details, see **Invoicing Workflow**.
   - **Need Additional Review** – If the invoice needs additional review, it is returned to the review stage of the workflow. When you select this, a dialog box appears, allowing you to select a reason for the action. To configure the reasons, see **Configuring Invoice Disapproval Reasons**. See **Sending Invoices Back to Review**.

You can also perform invoice management tasks on the Waiting for Approval Invoices page (**Acquisitions > Receiving and Invoicing > Approve**), as described in the referenced procedures:

- Change an invoice assignment - Select **Release assignment** in the row actions list for an invoice. The invoice is unassigned to and moved to the **Unassigned** tab.
- Release an invoice assignment - Select **Assign to** in the row actions list for an invoice. The reassignment dialog box opens. See **Assigned to Me, Unassigned, Assigned to Others Tabs**.
- Delete an invoice - Select **Delete** in the row actions list for an invoice and select **Confirm** in the confirmation dialog box. The associated expenditures are deleted and the encumbrances for the related POs are recalculated.
- Set invoices back to the Review stage (see **Sending Invoices Back to Review**)

---

**Note**

- You can delete an invoice only if you have been assigned the **Invoice Operator Extended** role.
- If your institution does not enforce approval rules, when a user with a role other than Invoice Manager selects **Save and Continue** on an invoice in review, the approval status is set to **Not Required** and the **Approved By** field is empty.
Working with Invoices Waiting for Payment

To edit invoice payment details, you must have one of the following roles:

- Invoice Operator
- Invoice Operator Extended
- Invoice Manager

You can manage only invoices associated with the scope assigned to your role. Watch the Invoices Waiting for Payment video (3:00 mins).

If `handle_invoice_payment` is set to `true` (see Configuring Other Settings), the invoice reaches the payment stage so that the institution itself can manage the payment of the invoice. Invoice payment can be managed in one of the following ways:

- Through the institutional bill payment system or ERP, if you have set up an import profile (see https://developers.exlibrisgroup.com/alma/integrations/finance and Financial Systems for more information). If you use this method, Alma imports payment details from the ERP system, automatically marks these invoices as Paid, and then closes them.
- Manually, by an invoice operator/manager, on Alma’s Waiting for Payment Invoices page (Acquisitions > Receiving and Invoicing > Waiting for Payment)

![](image)

Waiting for Payment Invoices Page

For information about the tabs on this page, see Assigned to Me, Unassigned, Assigned to Others Tabs.
To edit the payment details of an invoice:

1. On the Waiting for Payment Invoices page, locate the invoices whose payment details you want to edit and select Edit in the row actions list. The Invoice Details page appears.

Note

Only the Payment section of this page can be edited. If you want to edit other areas of the invoice, you must first
2. For **Payment status**, select **Paid** or **Not Paid**.

3. If you selected **Paid**, enter the following:
   - **Payment Identifier** – A reference number for the payment, such as an invoice or check number. When you work with an integrated external system, this field can contain an external reference number from the ERP system.
   - **Payment date**
   - **Payment amount** – The final amount that was paid (after exchange rates and so forth are taken into account)

4. Select one of the following:
   - **Save** – The payment information you entered is saved, but the invoice does not continue through the remainder of the invoice payment stage of the invoicing workflow.
   - **Save & Continue** – The payment information you entered is saved and the invoice continues to the following stage of the invoicing workflow. If the payment status of the invoice is **Paid**, the next stage in the workflow is for Alma to check whether the PO lines associated with the invoice are fully invoiced and paid. If they are, Alma closes these PO lines and then closes the invoice.

You can also perform invoice management tasks on the Waiting for Payment Invoices page.

- Delete an invoice (see **To delete an invoice:**)
- Set invoices back to the Review stage (see **Setting Invoices Back to Review**, below)

### Sending Invoices Back to Review

Invoices that are waiting to be paid can be sent back to In Review if they have not been sent to the ERP or have already been rejected by the ERP. Invoices rejected by the ERP are set back to In Review, automatically. The invoice rejection notification and reason is specified in the XML file that is sent by the ERP system (see **Financial Systems**).

Invoices that are closed or waiting for payment can be manually set back to review.

**To send invoices back to review:**

On the Waiting for Payment Invoices page, select **Set back to review** in the row actions list for the relevant invoice and select **Confirm** in the confirmation dialog box. The invoice’s status is set to **In Review**.

### Exporting Invoice to XML

You can generate an XML version of the invoice to send to the ERP system. This option appears only for invoices that are after the approval stage (with status **Ready to be paid**, **Waiting for Payment**, or **Closed**).

**To generate an XML version of the invoice to send to the ERP system:**

On the Waiting for Payment Invoices page, select **Generate Export XML** in the row actions list for the relevant invoice.
Renewals

This section includes:

- Renewal Workflow
- Processing Renewals
Renewal Workflow

Alma handles subscriptions for both electronic and physical material, such as magazines, journals, or periodicals, through automatic or manual renewals.

The following is an illustration of the renewal workflow that governs the way in which a PO line is marked for renewal, from its creation until the material is renewed:

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1. Pre-workflow – A PO line enters the Alma system in one of the following ways:
   1. Automatically, using an embedded order data (EOD) import. An EOD import sends PO lines either as a one-time occurrence, or continuously.
   2. Manually, as a PO line created by ordering a resource.

   For information on creating a PO line automatically, see Importing Records Using an Import Profile. For information on creating PO lines manually for both physical and electronic items, see Manually Creating a PO Line.

   The PO line is normalized, validated, and then processed to determine whether there are elements that require special attention based on rules preconfigured by an administrator. These activities are performed automatically by Alma.

   If there are data issues or alerts that require attention, the PO line is sent for review. For information on this manual activity, see Reviewing PO Lines. Once all data issues have been resolved, the PO line proceeds to step 2.
2. All PO lines that have been normalized and validated are stored in Alma.

A PO line that is fully processed and received/activated is marked **Waiting for Renewal** automatically. Continuous physical PO lines that are sent to the vendor have **Waiting for Renewal** status even if renewal is done manually but the renewal date has not yet arrived (see Renewals). Continuous electronic PO lines receive this status once they are activated and the user selects **Done** in the task list.

On a daily basis, Alma checks for all PO lines whose status is **Waiting for Renewal** and whose renewal date is equal to the current date. For the purposes of this calculation, the renewal date refers to the renewal date (according to the PO line) minus the renewal notification period.

3. Renewals are processed as follows:

1. If the PO line is marked as automatic, the **Renewal date** is automatically incremented according to the **Renewal cycle**. The PO line is then saved back in the repository for further processing (step 4).

2. If the PO line is marked as manual, it appears in the renewals task list (see **Processing Renewals**) and you are required to manually update the **Renewal date** and/or any other fields in the Renewals section of the PO Line Summary tab. The PO line will be set to **Waiting for Renewal**. You then select **Renew** to continue the renewal processing (step 4). Updating the Renewal date will also remove the PO line from the renewals task list.

4. When the PO line qualifies for renewal, a renewal notification is sent to the vendor if the `po_line_send_notification_to_vendor_on_renew` parameter is set to `true` (see **Configuring Other Settings**).
**Processing Renewals**

To process renewals, you must have the following role:

- Purchasing Operator
- Purchasing Manager

You can edit PO lines marked for automatic or manual renewal at any time. However, you cannot edit the vendor or acquisition method of these PO lines.

---

**Note**

Renewals can be processed only after the PO Line – Renewal job has run. (The process must be marked as Active on the Monitor Jobs page.)

---

After the PO Line - Renewal job runs, the PO Lines to Renew page (Acquisitions > Purchase Order Lines > Renew) lists all the PO lines that are due for renewal. You can access the PO Lines to Renew page also by selecting the Order Lines – Waiting for Renewal link in the Tasks List (see Tasks in the Task List).

---

**Note**

Renewals are not assigned to users, which is why the Assigned/Unassigned tabs do not appear on this page. The Assigned to field always shows a - (except in rare cases when the PO Line - Renewal job is processing that PO line at that very moment).

---

To view a PO line, select the name of the PO line. The PO line summary page appears (for details, see Viewing PO Line Information – Renewals). The PO Line Summary page for renewals is almost the same as the PO Line Summary page for regular acquisitions. The sections on this page and the respective fields that are specific for renewals are described in the Summary Tab Fields - Renewals table in Processing Renewals. For details on all other fields on this page, see Editing PO Line Information.

In addition, you can perform the following management tasks on a PO line to renew:

- **Edit** – See Editing PO Line Information – Renewals
• **Start a Trial** or **Request Evaluation** – When a PO line for a trial is created, it is automatically sent to the review task list. Depending on your role, you can either start the trial or request evaluation. For more information on trials/evaluations, see Evaluations and Trials. The minimum time that a PO line can be renewed after an evaluation is set in the vendor account; see Adding a Vendor and Vendor Account.

• **Close** – See Closing PO Lines

• **Cancel** – See Canceling PO Lines

• **Delete** – See Deleting PO Lines

---

**Editing PO Line Information – Renewals**

You can edit the displayed PO lines on the PO Line Summary page.

**To edit PO line information for renewals:**

1. Select **Edit** in the row actions list for the relevant PO line on the PO Lines to Renew page (Acquisitions > Purchase Order Lines > Renew). The PO Line Summary page appears, displaying a brief description of the PO line, its status, type (book/e-package), the library for which the item is being ordered, and the PO and PO line numbers. The tabs on the PO Line Summary page are described in **Editing PO Line Information**.

2. In the **Summary** tab, modify the displayed PO line information, as required. A description of selected (non self-
explanatory) fields, common to all PO lines, is provided in the **Summary Tab Fields** table in *Manually Creating a PO Line*. The following table describes the sections and fields that are specific to PO lines for renewals:

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Renewal</strong></td>
<td>Manual renewal</td>
<td>When selected (default), the PO line for the renewal appears in the renewals task list (<em>Acquisitions &gt; Purchase Order Lines &gt; Renew</em>) when the material is due for renewal. Further processing of this PO line must be performed manually.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When set to manual renewal and the renewal date (minus the renewal notification period) arrives, the PO Line renewal job will change the status of this PO Line from <em>Waiting for renewal</em> to <em>Waiting for manual renewal</em>. The PO line will be displayed in the Renewal task list. The operator will then need to edit the PO Line to change the renewal date to a future date.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>To automatically process the PO line renewal, clear this check box. Automatic renewal means that whenever the renewal date arrives the PO Line renewal job will automatically change the renewal date to the previous renewal date plus the time in the Renewal Cycle. The status of the PO Line remains <em>Waiting for renewal</em>.</td>
</tr>
<tr>
<td></td>
<td>Subscription from date</td>
<td>The date that the subscription for the PO line began. This field is informational only.</td>
</tr>
<tr>
<td></td>
<td>Subscription to date</td>
<td>If no date is entered, the renewal continues in perpetuity. The PO line closes when the automatic renewal job detects that the <strong>Subscription to date</strong> has passed. When a manual renewal job detects that the <strong>Subscription to date</strong> has passed, the PO line’s status becomes <em>Waiting for manual renewal</em>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>This date indicates the last day of the subscription and must not be confused with the <strong>Renewal date</strong>. For example, if you take out a subscription for five years that must be renewed annually (<strong>Renewal cycle</strong> = one year), the <strong>Subscription to date</strong> is the last day of the five-year period.</td>
</tr>
<tr>
<td></td>
<td><strong>Renewal date</strong> (Required)</td>
<td>The renewal date.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
<td>For automatic renewals, this date is entered when the initial subscription is created. Thereafter, it is automatically incremented according to the <strong>Renewal cycle</strong>. For manual renewals, this date is entered when the initial subscription is created, and then manually incremented at each renewal cycle.</td>
</tr>
<tr>
<td></td>
<td><strong>Renewal cycle</strong></td>
<td>The renewal cycle period — for example, 1 year.</td>
</tr>
<tr>
<td></td>
<td><strong>Renewal reminder period</strong></td>
<td>For manual renewals, the number of days before the renewal date that the operator wants to be reminded about the renewal (that is, the number of days before the renewal date that the operator wants the renewal to be added to the task list (<em>Acquisitions &gt; Purchase Order Lines &gt; Renew</em>). For example, if the renewal date is the 10th of May and the <strong>Renewal reminder period</strong> is 5, the renewal is added to the task list on the 5th of May,.)</td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
3. In the **Description** tab, modify the PO line information, as required.

4. In the **Alerts** tab, view the alerts that were generated for the PO line. The following are the most common alerts generated by the system:
   - **Waiting for Renewal** – Generated when the calculated **Renewal date** for an automatic renewal is later than the **Subscription to date**. The PO line for the renewal appears in the Waiting for Renewal task list (**Acquisitions > Purchase Order Lines > Renew**) with this alert.
   - **There is an active, duplicated order # for this ordered resource** – Generated when there is a duplicated order for the resource.

5. In the **Invoice Lines** tab, view, add, or edit any invoice lines associated with the PO line. For information on invoice lines, see **Creating an Invoice From a PO or Manually**.

6. In the **Associated PO Lines** tab, view the PO lines associated with the current PO line, as required. For details on editing a PO line, see **Creating PO Lines**.

7. In the **Communications** tab, start a new communication with the vendor. If there is an existing communication with the vendor, you can enter details of the reply from the vendor and/or follow up on the communication with your reply to the vendor. For details on this tab, see **Communicating with Vendors**.

8. In the **Notes** tab, edit as required any notes that may have been included when the PO line was created. For details on working with notes, see step 16 in **Manually Creating a PO Line**.

9. In the **Attachments** tab, edit as required any attachments that may have been included when the PO line was created. For details on working with attachments, see step 17 in **Manually Creating a PO Line**.

10. In the **Interested Users** tab, you can add or modify the activities for interested users. See the Interested Users tab in **Manually Creating a PO Line**.

   **Note**
   
   Notification is not sent to users when a PO line is canceled or deleted.

11. After you have completed editing the PO line, select one of the following actions (not all actions are available for all PO lines):
   - **Renew** — Renew the PO line and recalculate the renewal date.
   - **Relink** – Changes the bibliographic record to which the PO line is linked (see **Relinking PO Lines**).
   - **Cancel line** — The PO line is not renewed and is canceled. A dialog box appears, requesting a reason for the cancellation and, if vendor notification is configured, a cancellation notification is sent to the vendor (see **Canceling PO Lines**).
   - **Change Bib Reference** – Changes the bibliographic record of the PO line. See **Changing Bibliographic Reference**.
   - **Save** — The information you modified is saved, but the status of the PO line remains **Waiting for Renewal** and the PO line does not continue to the next stage of the renewal workflow. Use this option if you are unsure as to whether you want the PO line to continue to the next stage of the renewal workflow.
   - **Save and Request Evaluation** – The information you entered is saved and a trial is requested. Use this option if
you do not have the Trial Operator/Trial Manager role. The PO line’s status changes to **Under Evaluation** and moves to the Manage Trials page with the status **Requested**, where the Trial Operator/Trial Manager can access it and continue with step 3 in the evaluation workflow. This option is available only for electronic PO lines that create inventory.

- **Save and Start Trial** – The information you entered is saved and a trial is started. Use this option if you have the Trial Operator/Trial Manager role and want to start the trial. The PO line’s status changes to **Under Evaluation** and the Trial Details page opens (continue with the evaluation workflow at step 3). This option is available only for electronic PO lines that create inventory.

- **Change Vendor** - See Changing Vendors - Renewals.

- **Close** – The PO line is closed. Select **Confirm** in the confirmation dialog box to close the PO line (see Closing PO Lines).

- **Delete** – The PO line is deleted. Select **Confirm** in the confirmation dialog box to delete the PO line (see Deleting PO Lines).

- **Replace (Only) Vendor** – Change the vendor to which the PO line is sent (see Changing Vendors – Renewals).

- **Save as template** — The entered field values are saved as part of a template.

---

### Changing Vendors – Renewals

You can change the vendor to which the PO line is sent when renewing the PO line. Changing the vendor closes the PO line and creates a new one.

**To change the vendor:**

1. After you have completed editing the PO line (see Editing PO Line Information – Renewals), select **Change Vendor** and select **Confirm** in the confirmation dialog box. The following dialog box appears:

   ![Change Vendor in order](image)

   **Change Vendor on Order**

2. Select the target vendor/account and select **Change Vendor on Order**.

   The following occurs:

   - The current PO line is closed.
   - A new PO line for the new target vendor/account is created.
   - The new PO line is associated with inventory from the closed PO line.
   - The new PO line is set to **In Review** status from which the operator can update the new PO line with new information, according to the information communicated with the new target vendor.

For more information on changing the vendor account details, see the [Change Vendor of a Purchase Order](#) video (3:13 mins).
Deferrals

This section includes:

- Deferring PO Line Workflow
- Deferring PO Lines
Deferring PO Line Workflow

Deferring a PO line enables you to save the order for a later time.

The following is an illustration of the deferred PO line workflow that governs how a PO line is handled, from its deferral until it is either reactivated or canceled.

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1. The deferral process commences when you select a PO line for deferral. You can defer any PO line except those with the Acquisition method of Approval plan or Purchase at vendor system. PO lines that you want to defer must be at one of the following stages in the purchasing workflow (see Purchasing Workflow):
1. **PO Lines > Review** – PO lines in review, waiting for correction or to be completed.

2. **PO Lines > Package** – PO lines that are complete and ready for packaging.

3. **PO > Review** – PO lines that have been packaged but have not yet been approved. If a PO line is packaged with other PO lines, the deferred PO line is removed from the PO. The PO can still be sent, but only with the remaining PO lines. If the PO line is the only one in the packaged PO, you must delete the PO before you can defer the PO line.

2. You defer the PO line by entering a date on which you want to be reminded about the PO line and a reason for the deferral. On the date of deferral, the PO line appears in the deferred PO lines task list.

PO line deferral reasons can be configured by an administrator on the Acquisitions Configuration menu (see Configuring PO Line Deferral Reasons). For details on deferring a PO line, see Deferring PO Lines.

---

**Note**

If the **Deferral reminder** date has passed and no action is taken on the deferred PO line, the PO line no longer appears in the deferred PO lines task list. Instead, it remains on the Review Deferred PO Lines page (see step 3).

---

3. After entering the **Deferral reminder** date and **Deferring reason**, the PO line moves to the Review Deferred PO Lines page, where it remains until it is either reactivated or canceled (see Reviewing Deferred PO Lines).

4. You can perform the following actions on deferred PO lines:

1. **Edit** – Edit any of the fields in the PO line. After editing the PO line, you can either save it or reactivate it. When you save the PO line, it remains on the Review Deferred PO Lines page. If you reactivate the PO line, it is once again normalized and validated. If the PO line passes the normalization and validation phase, it moves to the next step in the purchasing workflow (see Purchasing Workflow). If the PO line is still incomplete, it is sent to the Review PO Lines page until it is corrected. For details on editing a PO line, see Editing Deferred PO Lines.

2. **Assign to** or **Release assignment** – For more about the Assigned to Me, Unassigned, and Assigned to Others tabs, see Assigned to Me, Unassigned, Assigned to Others Tabs.

3. **Order now** — Process an order for a deferred PO line, which moves the PO line to the purchasing workflow where it is normalized and validated (see step 5) before being packaged(see step b) and sent (see Packaging a Deferred PO Line into a PO).

   If you select Order Now, you receive a message (Order Now Letter) after the order is sent for processing. For information on the Order Now Letter, see Configuring Alma Letters.

4. **Reactivate** – Reactivate a PO line, which returns it to the stage of the purchasing workflow that it had reached before deferral. The PO line is normalized and validated (see step 5) before being returned to either Review or Automatic/Manual Packaging (see step 6). For details on reactivating a PO line, see Reactivating Deferred PO Lines.

5. **Relink** – Link the PO line to a different bibliographic record (see Relinking PO Lines).

6. **Cancel** – Cancel a PO line that is no longer required (see Canceling Deferred PO Lines).

7. **Delete** – Delete a PO line from Alma (see Deleting PO Lines).

5. When the PO line is reactivated or processed using the **Order now** option, it moves back into the purchasing workflow (see step 2), where it is normalized and validated.

6. Depending on whether the PO line passes the normalization and validation stage, the workflow proceeds as follows:

   1. If the PO line does not pass the normalization and validation stage, it remains in review until corrected.

   2. If the PO line passes the normalization and validation process, it moves to the packaging stage in the workflow.
It is sent after packaging is complete.
Deferring PO Lines

To defer PO lines, you must have the following role:

- Purchasing Operator

PO lines on the Purchase Order Lines in Review page and PO lines that have been packaged but not yet approved can be deferred (see Deferring PO Line Workflow). You can defer any PO line except those with the Acquisition method of Approval plan or Purchase at vendor system.

To defer a PO line:

1. On the Purchase Order Lines in Review page (Acquisitions > Purchase Order Lines > Review), or on the PO Lines tab of the Purchase Orders in Review page (Acquisitions > Purchase Order > Review; edit a PO and select the PO Lines tab), select Defer in the row actions list for the PO line. The Deferring PO Line dialog box opens.

![Deferring PO Line Dialog Box](image)

2. Select a date in the Deferral reminder field.

3. Select a Reason for the deferral. Reasons are predefined by an administrator (see Configuring PO Line Deferral Reasons).

4. Optionally, enter a Note.

5. Select Defer. The PO line is deferred and moves to the Review Deferred page (see Reviewing Deferred PO Lines). If this is the only PO line in the PO, the PO is canceled and is removed from the Purchase Orders in Review page.

The PO Line - Deferred job runs daily to check the deferral date against the current date. If the two dates are the same, an alert is generated and appears in the Alert facet on the Review Deferred page. At the same time, a reminder that the deferral date has arrived appears in the deferred PO lines task list. The reminder appears in the Dashboard task list only on the Deferral reminder date. After that date, the PO line appears on the Review Deferred page with the task label Deferred PO lines waiting for your handling until one of the following is done:

---

Note

- The above example appears when deferring a PO line on the Purchase Orders in Review page. When deferring a PO line on the other pages, the warning above the Deferral reminder field is not displayed.
- In this example, the PO contains only one PO line. You therefore receive a warning that the PO will be canceled if the PO line is deferred. If the PO contains more than one PO line, this warning does not appear, and the PO is not canceled. In this latter case, the PO can still be approved with its remaining PO lines.
The PO line is reactivated or canceled.
The deferral reminder date is changed to a future date.

See Viewing Scheduled Jobs.

### Reviewing Deferred PO Lines

When a PO line is deferred, it moves to the Review Deferred page (Acquisitions > Purchase Order Lines > Review Deferred), where it remains until it is either reactivated or canceled. The Review Deferred page displays deferred PO lines on the Assigned to Me, Unassigned, and Assigned to Others tabs. For more information about these tabs, see Assigned to Me, Unassigned, Assigned to Others Tabs.

You can view this page with the Assigned to Me tab pre-selected by selecting the task Order Lines - deferred - assigned to you in the Tasks List (see Tasks in the Task List).

Depending on the nature of the deferred PO line, you can perform the actions described in the following sections:

### Editing Deferred PO Lines

You can edit a deferred PO line that is displayed in the Assigned to Me tab or Unassigned tab, if you have the appropriate permissions.

**Note**

If you edit a PO line in the Unassigned tab, the PO line becomes assigned to you.

To edit deferred PO lines:

1. On the Review Deferred page (Acquisitions > Purchase Order Lines > Review Deferred), select the Edit in the row actions list for the PO line that you want to edit. The PO Line Summary page appears.
2. Edit the PO line information as described in Editing PO Line Information. The following additional fields, not described in the above section, can also be edited.

Deferred PO Lines - Summary Tab Fields

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO Line details</td>
<td>Deferral reminder</td>
<td>Select a new date.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>You cannot delete the <strong>Deferral reminder</strong> date. To remove this date, reactivate the PO line (see Reactivating Deferred PO Lines below).</td>
</tr>
<tr>
<td></td>
<td>Deferring reason</td>
<td>Select a reason for the deferral. Reasons are predefined by an administrator (see Configuring PO Line Deferral Reasons).</td>
</tr>
</tbody>
</table>

3. Select **Save**. The deferred PO line is saved.
Reactivating Deferred PO Lines

Reactivating a deferred PO line means that you remove the deferral from the PO line, normalize and validate it, and move it back into the stage of the purchasing workflow that it had reached before deferral.

To reactivate a deferred PO line:

On the Review Deferred page (Acquisitions > Purchase Order Lines > Review Deferred), select the Reactivate in the row actions list for the PO line that you want to reactivate and select Confirm in the confirmation dialog box.

The PO line is normalized and validated and moved back into the stage of the purchasing workflow that it had reached before deferral. If the PO line is complete, it moves to the packaging stage of the workflow.

Packaging a Deferred PO Line into a PO

A PO line that is ordered using Order now passes through the normalization and validation stage of the workflow and proceeds to the packaging stage, where the deferred PO line is packaged into a PO.

To package a deferred PO line into a PO:

On the Review Deferred page (Acquisitions > Purchase Order Lines > Review Deferred), select the Order Now in the row actions list for the PO line for which you want to place an order and select Confirm in the confirmation dialog box.

The PO line is normalized and validated. If normalization and validation succeed, the PO line moves to the packaging stage of the workflow. If normalization and validation does not succeed, the PO line is sent for review to be corrected. You receive a message (Order Now Letter) after the order is sent for processing. For information on the Order Now Letter, see Configuring Alma Letters.

For details on the packaging stage of the workflow, see Packaging PO Lines into a PO.

Relinking Deferred PO Lines

See Relinking PO Lines.

Canceling Deferred PO Lines

See Canceling PO Lines.
Evaluations and Trials

This section includes:

- Evaluation Workflow
- Managing Trials
Evaluation Workflow

When a vendor offers new electronic material to the institution for evaluation, or a request is received from a member of the institution to have electronic material evaluated, you can run a trial to evaluate the material.

In Alma, an **evaluation** is the workflow of using and evaluating the material. A **trial** is an instance of the evaluation workflow.

The following is an example workflow that governs the way in which a PO line evaluation is handled, from the point of its creation for the evaluation to the point at which a decision is made whether to purchase the electronic material.

Users performing each of the workflow steps must have the appropriate roles (Trial Operator/Trial Manager or Purchasing Operator) to perform these steps:

- **Trial Operator/Trial Manager** — Manages the trial
- **Purchasing Operator** — Manages the PO

**Note**

Unless noted, wherever **Trial Operator** is used in the following sections, the action can be performed by either a **Trial Operator** or **Trial Manager**.

Depending on the administrative decision of your institution, a user may be assigned both of these roles, in which case all the workflow steps (except step 5 below) are performed by the same user. Step 5 in the workflow is performed by the trial participants.

**Note**

Evaluations apply only to electronic collections of the type **package**, and to portfolios. They are currently not supported for electronic collections of type **database**.
For more information, see the Starting and Managing Trials in Alma video (6:00 mins).

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1. The evaluation starts when a vendor offers new electronic material to the institution for evaluation or a request is received from a member of the institution to have electronic material evaluated. These requests are passed on to the Trial Operator who in turn sends a request to the Purchasing Operator to create a new PO line for the evaluation.

2. The Purchasing Operator searches for the relevant e-resource in the Community Zone and manually creates a new PO line for it. After entering all of the PO line information, the Purchasing Operator selects one of the following options:

   ◦ **Save and Request Evaluation** – The Purchasing Operator selects this if the user does not also have the Trial Operator role. This option is only available if the PO line is assigned to the user. The PO line’s status changes to **Under Evaluation** and moves to the Manage Trials page with the status **Requested**, where the Trial Operator can access it and continue with step 3 below.

   ◦ **Save and Start Trial** – The Purchasing Operator can select this if the user also has the Trial Operator role and wants to start the trial. This option is only available if the PO line is assigned to the user. The PO line’s status changes to **Under Evaluation** and the Trial Details page opens (step 3).

For more information, see Manually Creating a PO Line. An evaluation can also be started while reviewing the PO...
3. The Trial Operator enters additional information about the trial (see Managing Trials). When the information is complete, the trial’s status changes to Draft and the PO line continues with step 4 in the workflow.

4. All PO lines that have been normalized and validated and are ready for the trial to start are stored in a repository, awaiting the next step in the workflow.

5. The trial participants receive notifications about the trial and complete and submit the survey form.

Note
A PO line with the status Under Evaluation can be edited only on the Manage Trials page by a user with the Trial Operator role.

Note
For notifications to be sent, the Trials – Start and Notify Participants job must be marked as Active on the Monitor Jobs page – see Viewing All Scheduled Jobs. The notification sent is the Trial Letter and can be configured, see Letter Types.

- If the trial is private, the participants receive an email invitation to participate in the trial.
- If the trial is public, you can publish details of the trial (on your internal web site or by email, for example) and invite members of the institution to participate. The URL for the trial uses the path in the Participant Page URL field on the Summary tab of the Trial Details page, as follows: https://<Alma domain>/<participant page url>. Anyone with the URL can participate in the trial.

6. The trial has ended. The Trial Operator evaluates the results of the survey and makes a decision as to whether to purchase the material (see Analyzing Trial Results).

7. The purchasing decision taken by the Trial Operator in the previous step of the workflow is implemented. If the decision is to purchase the material, the PO line continues in the regular PO line workflow described in step 2 of the Purchasing Workflow. If the decision is not to purchase the material, the Purchasing Operator cancels the PO line (see Canceling PO Lines).
Managing Trials

To manage trials, you must have at least one of the following roles:

- Trial Operator
- Trial Manager

Unless noted, wherever Trial Operator is used in the following sections, the action can be performed by either a Trial Operator or Trial Manager.

For information on how to request or start a trial, see step 2 of the Evaluation Workflow.

In order for a trial to proceed, you must:

- Enter general details of the trial, including the title of the material, the trial start and end dates, and whether the trial is public or private.
- Create the survey form to be completed by the participants when evaluating the material.
- Enter details of the participants in the trial, if the trial is private.

For detailed instructions, see Editing Trial Information.

After the trial has ended, analyze the trial results and record a purchasing decision. For detailed instructions, see Analyzing Trial Results.

Note

For a detailed description of the various steps of a trial, see Evaluation Workflow.

Watch the Starting and Managing Trials video (6:00 mins).

You manage existing trials on the Manage Trials page (Acquisitions > Purchase Order Lines > Manage Trials). You can also view this page with the requests pre-filtered by Status by selecting one of the following tasks in the Tasks List in the persistent menu (see Tasks in the Task List):

- Order Lines in evaluation - analysis
- Order Lines in evaluation - draft
- Order Lines in evaluation - requested

Manage Trials Page

Select one of the following options in the row actions list:

- Edit – Edit trial information (see Editing Trial Information).
• Close – Mark the trial as completed. Select Confirm in the confirmation dialog box. The trial may be edited after it is closed.

• Delete – Delete the trial. Select Confirm in the confirmation dialog box.

• Edit PO Line – Edit the PO line associated with the trial. Opens the Summary tab of the PO Line Summary page (see step 8 in Manually Creating a PO Line).

• Activate – Activate the trial. Opens the Activation Wizard, as described in Activating Electronic Resources.

Note
After you activate the trial, the daily Trials – Start and Notify Participants job assumes control of the trial until the trial end date. On the trial end date, the trial once again appears in the task list, enabling the Trial Operator to study the analysis of the trial results and make a purchasing decision.

Editing Trial Information
You can edit a PO line’s trial information.

Note
If you have the roles of both a Purchasing and Trial Operator, the Summary tab on the Trial Details page appears when you select the Request evaluation link on the Purchase Order Lines in Review page. Continue with step 3 in the procedure below.

To edit trial information:

1. On the Manage Trials page (Acquisitions > Purchase Order Lines > Manage Trials), select Edit in the row actions list for the trial you want to edit. The Trial Details page appears.

2. In the Summary tab, modify the displayed PO line information, as required. A description of the fields is provided in the following table.

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td>Name (Required)</td>
<td>The name of the trial as entered by the Purchasing Operator.</td>
</tr>
<tr>
<td>Section</td>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>--------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Title</td>
<td>The title of the trial material.</td>
</tr>
<tr>
<td></td>
<td>Start date (Required)</td>
<td>The start date for the trial, selected from the Calendar dialog box. The date must be later than the current date. The trial's status changes to <strong>Active</strong> on this date.</td>
</tr>
<tr>
<td></td>
<td>End date (Required)</td>
<td>The end date for the trial, selected from the Calendar dialog box. This date must be later than the start date. The trial's status changes to <strong>In Analysis</strong> on this date if the Trials - Start and Notify Participants job is active.</td>
</tr>
<tr>
<td></td>
<td>Remind participants before trial ends</td>
<td>The number of days before the end of the trial that you want an email reminder sent to trial participants.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>For emails to be sent, the Trials – Start and Notify Participants job must be <strong>Active</strong>; see Viewing All Scheduled Jobs. The notification sent is the Trial Letter (letter code: TrialLetter) and can be configured; see Configuring Alma Letters.</td>
</tr>
<tr>
<td></td>
<td>Available to public</td>
<td>When selected, indicates that the trial is available to the public (open to anyone).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>By default, this check box is not selected, and the trial is a private trial. This means that the trial is limited to the trial participants whom you invite to participate in the trial (in the <strong>Participants</strong> tab).</td>
</tr>
<tr>
<td></td>
<td>Contact</td>
<td>The name of the contact person in the institution who is responsible for the trial.</td>
</tr>
<tr>
<td></td>
<td>Participant page URL</td>
<td>The path to the trial survey. Filled in automatically after the start and end dates are entered, and cannot be edited. The URL for the trial includes the <strong>Participant Page URL</strong> field, as follows: <code>https://&lt;Alma domain&gt;/&lt;participant page url&gt;</code></td>
</tr>
<tr>
<td></td>
<td>Copy to Clipboard</td>
<td>The full URL can be copied to the clipboard to use it outside of Alma without the need to copy the partial URL and add the server name. For more information, watch the Get Full URL for Survey of an E-Resource Public Trial video (1:07 min).</td>
</tr>
<tr>
<td></td>
<td>View Form</td>
<td>A link that displays the trial survey.</td>
</tr>
<tr>
<td></td>
<td>Analysis and Results</td>
<td>This section is completed by the Trial Operator after reviewing and analyzing the results of the trial (see Analyzing Trial Results).</td>
</tr>
</tbody>
</table>

3. In the **Survey Form** tab, create the questions for the survey.
In the Form Configuration section, select the Hide Portfolio Tab and/or Hide Collection Tab check boxes if you want those tabs to be suppressed from the survey form sent to the users. Select the Add Survey Prefix check box to include an explanatory message that appears at the top of the survey. Enter the message in the Prefix Message field.

Add questions to the survey for either the General Information or Questions sections using one or both of the following methods:

- In Add from list, select a question from a list of existing questions. The Survey Form Question List page opens. Select the questions you want to use for the survey and select Select. The questions are added to the form.
- Select Add Question. The Add Question dialog box appears. Enter the question information as follows:

1. From the Type drop-down list, select one of the following types of questions: Scale of satisfied (for example, 1-5), Yes/No, Free text, Multi choice, or Single choice.
2. Enter the text of the question in the Question field.
3. For Multi choice or Single choice questions, enter a Question code. This code will associate the values you enter back to the question.
4. For Multi choice or Single choice questions, select Add Value. Enter a Value and select Add. Repeat this step until you have entered all the values for the question.
5. Select the **Answer for this question is mandatory** check box to require the user to answer the question.

6. Select the **Add comment** check box to add a comment field to the question. Another field appears to enter the label for the comment.

7. Select **Add** to add the question to the survey and leave the dialog box open to add an additional question, or select **Add and Close** to add the question to the survey and close the dialog box. The question is added to the form.

4. To edit a question, select **Edit** in the row actions list for the question you want to edit. Modify the question as required and select **OK**.

   To rearrange the order of questions, use the **Move Down** and **Move Up** arrows.

   To delete a question, select **Delete** in the row actions list for the question you want to delete, and select **Confirm** in the confirmation box.

5. If you are defining a private trial, select the **Participants** tab to select the participants in the trial.

![Participants Tab with List of Participants](image)

Use the secondary search to search for the participants you have added to the trial.

To add participants, select **Select participants** to search for and select users on the Find and Manage Users page (see [Searching in Alma](#)). Select the users and select **Select**. The selected participants are added to the trial.

To load a participant from a set, select **Load from a set** and select a set from the set list. At the top of the Trial Details page, a message displays to indicate the number of participants that were added out of the possible set size. Duplicates and deleted users will not be loaded.

If a checkmark appears in the **Is Notified** column, the user has already received a notification. Another notification will not be sent to the user when notifications are sent out. To reset a user so that they will receive another notification, either select **Reset Notification** on the row action list, or select a group of users and select **Reset All Notifications** from the view action list.
To remove a participant, select **Delete** in the row actions list for the user.

6. The **Analysis** tab appears only after the trial is created. In the **Alerts** tab, view the alerts generated for the trial.

7. In the **Attachments** tab, add, update, or delete attachments for the survey. For details on working with attachments, see **Attachments Tab**.

8. In the **Notes** tab, add, update, or delete notes for the survey. For details on working with notes, see **Notes Tab**.

9. When you have modified the PO line information for the trial as required, select **Save**.

---

**Analyzing Trial Results**

As responses are completed and submitted by the trial participants, they are recorded and analyzed in the **Analysis** tab. The Trial Operator reviews the results, makes a purchasing decision, and enters the decision in the Analysis and Results section of the **Summary** tab (see Entering and Saving Trial Results).

After the results of the trial are entered, the Trial Operator saves the trial. If no purchasing decision was taken, a dialog box appears asking for confirmation that the trial can be saved without this information. The trial then remains on the Manage Trials page.

---

**Note**

If the decision is not to purchase, the Purchasing Operator can decide to cancel the PO line. For more information on canceling the PO line, see **Canceling PO Lines**.

---

If a purchasing decision was taken:

- The trial information is normalized and validated.
- An alert is generated indicating that there is a purchasing decision for the trial.

The PO line is sent to the review PO lines task list (see step 2 in **Purchasing Workflow**). The Purchasing Operator can then proceed to process the PO line as part of the normal purchasing workflow.

**To view the trial analysis:**

1. On the Manage Trials page (**Acquisitions > Purchase Order Lines > Manage Trials**), select **Edit** in the row actions list for the trial you want to edit. The Trial Details page appears on the **Summary** tab (see **Editing Trial Information**).

2. Select the **Analysis** tab to open the Trial Analysis page.
The Analysis tab contains the following sections:

- **General Information** – The number of surveys sent out to participants as well as the number of responses returned
Within each range, the following information is displayed:

- Question Number
- Question
- Responses
- Average — For Yes/No questions, the number of yes/no responses is shown. For Scale of satisfied questions, the average of all responses is shown. For questions where the answers are in free text, the number of responses is shown, as well as a list of each response.

In addition to response totals, you can view graphical representations for the answers to each question and for the total of each range of questions. Yes/No and single or multi choice questions will display a pie chart with a table listing the results per option and comments. Scale of satisfaction questions will display a bar chart and average score.

**Entering and Saving Trial Results**

After analyzing the responses to the trial, the Trial Operator enters the results and the purchasing decision in the Analysis and Results section of the Summary tab. The minimum information that the Trial Operator must enter in this section is the Result and Result Date.

After the results are entered, the PO line is saved. If the decision was made to purchase the material, the PO line continues with step 2 of the purchasing workflow (see Purchasing Workflow). If the decision was made not to purchase the material, the Purchasing Operator can decide to cancel the PO line on the Purchase Order Lines in Review page (see Canceling PO Lines).

To enter the analysis and results of the trial:

1. On the Manage Trials page (Acquisitions > Purchase Order Lines > Manage Trials), select Edit in the row actions list for the trial you want to edit. The Trial Details page appears on the Summary tab (see Editing Trial Information).
2. Enter the analysis and results of the trial in the Analysis section. A description of the fields in this section is provided in the following table.

<table>
<thead>
<tr>
<th>Analysis and Results Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Section</strong></td>
</tr>
<tr>
<td>Analysis and Results</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

3. Select one of the following buttons:
   - **Save** — Store the results of the trial. If you decided to purchase the material, the PO line continues with step 2 of the purchasing workflow (see Purchasing Workflow). If you decided not to purchase the material, the PO line can be canceled, as described in Canceling PO Lines.
   - **Export Survey Feedback** — Exports a summary of the trial, with one tab each for the results of General
Information and Questions, to an Excel spreadsheet.
Import Processing

The sections in acquisitions for monitoring and viewing import jobs are similar to the sections in resource management. See Record Import.

Note

When you view available import profiles or monitor import jobs using the acquisitions links, the New Order and Update Inventory import profiles and related jobs appear in the tables (these profiles and jobs do not appear when you use the resource management links).
Acquisitions Infrastructure

This section includes:

- **Managing Vendors**
  - Managing COUNTER-Compliant Usage Data
  - SUSHI Vendor Lists
- **Managing Funds and Ledgers**
- **Transferring Money Between Allocated Funds**
- **Moving Funds**
- **Managing Licenses and Amendments**
Managing Vendors

To manage vendors and vendor accounts, you must have the following role:

- Vendor Manager

Before creating a purchase order, you must create entries in Alma for the vendor that will supply the order. For each vendor, you must also create one or more vendor accounts, representing specific purchasing accounts at the vendor.

Watch the Creating a Vendor and Vendor Account video (5:00 mins).

You manage vendors and vendor accounts on the Search Vendors page (Acquisitions > Acquisitions Infrastructure > Vendors or search for a vendor in the persistent search box).

Search Vendors Page

Vendor types include (a vendor may be multiple types):

- Material Supplier – Supplies the reading material or the subscription to the material. A material supplier receives orders and payment for resources in all formats.
- Access Provider – Provides access to electronic resources.
- Licensor – Provides licenses to other vendors’ electronic resources. See Managing Licenses and Amendments.
- Governmental – Provides material or access, and receives use tax (VAT) for an invoice payment from non-governmental vendors. See Adding a Vendor and Vendor Account.
- SUSHI Vendor – Provides COUNTER (Counting Online Usage of Networked Electronic Resources) compliant usage statistics. See Managing COUNTER-Compliant Usage Data.

Managing vendors and accounts includes:

- Add a vendor or vendor account – See Adding a Vendor and Vendor Account. A vendor cannot be active until it has at least one active vendor account with at least one payment option selected.
- Edit a vendor or vendor account – See Editing Vendor or Vendor Account Information. You must edit the vendor or vendor account to activate or deactivate it.
- Delete a vendor or vendor account – See Deleting a Vendor or Vendor Account.
Adding a Vendor and Vendor Account

To manage vendors and vendor accounts, you must have the following role:

- Vendor Manager
- Vendor Account Manager

You add a vendor by creating a vendor account and entering a new vendor name. You can also add a vendor account to an existing vendor. A vendor cannot be activated until it has at least one vendor account with at least one payment option selected.

A vendor account manager in the scope of a library can only view vendor accounts whose vendor type is **Material Supplier** and are available for this scope. All vendor accounts within the vendors of this scope can be edited. If a vendor account is available for two libraries and the user has the Vendor Account Manager role in either library, the user can see the vendor account. In order to edit or delete the vendor account, though, the user must have the Vendor Account Manager role in the scope of both libraries. A vendor account manager in the scope of the institution can view all vendors and edit all vendor accounts in any vendor.

**To add a vendor and vendor account:**

1. On the Search Vendors page (Acquisitions > Acquisitions Infrastructure > Vendors), select **Add Vendor**. The Vendor Details page appears.

   ![Vendor Details Page](image)

2. Enter the vendor name and a code. These fields are required.

   A vendor code must:

   - Be unique across all vendors.
   - Be up to 255 characters.
   - Contain only alphanumeric characters.

3. Enter any other relevant vendor details.

**Note**

Curly braces - `{}` and `}` - are allowed in vendor data, but the string `{}` is not allowed and will cause the vendor to
4. If this is a non-governmental vendor: select **Liable for VAT** to indicate that invoices must be paid with VAT included. You must also select this field to enable a separately-defined governmental vendor to collect VAT for this vendor’s invoices (see the following step). For more information about how Alma handles VAT, see [How Alma Handles VAT Payments](#).

5. Select the vendor type from the following check boxes:

   - **Material supplier/Subscription agent** – Supplies the reading material or the subscription to the material. A material supplier receives orders and payment for resources in all formats. See step 6.
   - **Access provider** – Holds the access privileges to vendor interfaces, which are collections of electronic collections (which are, in turn, collections of e-resources). See step 7.
   - **Licensor** – Holds the license of electronic resources. A licensor must be defined when defining a license on the Licenses and Amendments page; see [Managing Licenses and Amendments](#).
   - **Governmental** – The vendor receives use tax (VAT) for an invoice payment from non-governmental vendors. Use tax represents a tax on the usage of library items, and is expended from the same funds as the actual invoice charges. See step 8.

   If a governmental vendor is associated with the institution, and the vendor is defined as liable for VAT (liable for use tax), and an invoice is set to report (use) tax, then, when the invoice is created, Alma automatically generates a separate invoice for the use tax.

   A governmental vendor’s invoices handle only use tax on invoices, ensuring that tax payments are handled separately from the regular invoice charges and go directly to the government.

   A governmental vendor cannot be selected when configuring a vendor for the PO line or invoice; it is used only for handling use tax invoices.

   Alma assigns the type **SUSHI Vendor** automatically if you select **SUSHI Vendor** on the **Usage Data** tab. See [Managing COUNTER-Compliant Usage Data](#).

6. If you selected **Material Supplier/Subscription Agent** an **Account** area appears.

   1. In the **Accounts** area, select **Add**. The Vendor Account Details page appears, enabling you to define different accounts for purchases from the vendors.
2. Configure the form fields, as described in the following table:

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account General Details</td>
<td>Account description (required)</td>
<td>A description for the account</td>
</tr>
<tr>
<td></td>
<td>Account code (required)</td>
<td>A code for the vendor account. This should be unique for your institution.</td>
</tr>
<tr>
<td></td>
<td>Note</td>
<td>To avoid issues with creating EDI files (see Configuring EDI for a Vendor), use at least three characters for the account code and use only alphanumeric characters in the first six characters of the account code.</td>
</tr>
<tr>
<td></td>
<td>Financial sys. account code</td>
<td>A code for the financial system account</td>
</tr>
<tr>
<td></td>
<td>Status</td>
<td>Active or Inactive</td>
</tr>
<tr>
<td></td>
<td>Libraries</td>
<td>Select the institution, or select the specific libraries that can use this account. The list of available libraries is based on the libraries selected for the vendor.</td>
</tr>
<tr>
<td></td>
<td>Account discount percent</td>
<td>A discount percentage for the account, if any. This value is pre-filled in the Discount (%) field when purchasing. See Manually Creating a PO Line.</td>
</tr>
<tr>
<td></td>
<td>Note</td>
<td>Add a note for the account</td>
</tr>
<tr>
<td>Payment Methods</td>
<td>Payment methods (required)</td>
<td>Enable payment methods for invoices. Options are: Accounting Department, Cash, Credit card, Deposit account, or Bank transfers. For information on the workflow impact of the payment method, see the Payment method field in Invoice Details Page Fields in Creating an Invoice from a PO or Manually.</td>
</tr>
<tr>
<td></td>
<td>Expected receipt after ordering (days)</td>
<td>When creating a PO line for a physical resource, this value appears by default in the same field on the PO Line Summary page (see Summary Tab Fields). It is added to the current date to determine the expected receipt date.</td>
</tr>
<tr>
<td></td>
<td>Expected invoice interval (days)</td>
<td>N/A</td>
</tr>
<tr>
<td>Delivery and Claim Information</td>
<td>Renewal evaluation interval (days)</td>
<td>The number of days after the evaluation period that renewal can be performed. See Processing Renewals.</td>
</tr>
<tr>
<td></td>
<td>Claiming grace period</td>
<td>When creating a PO line, this value appears by default in the same field on the PO Line Summary page. It is added to the expected receipt date to determine when a PO line is sent to the Claims task list (see Processing Claims).</td>
</tr>
</tbody>
</table>
When creating a PO line for an e-resource, this value appears by default in the same field on the PO Line Summary page. It is added to the current date to determine the expected activation date of the resource. See Summary Tab Fields.

When creating a PO line, this value appears by default in the Claiming grace period field on the PO Line Summary page. It is added to the expected activation date to determine when a PO line for an e-resource is sent to the Claims task list (see Processing Claims).

3. Select Save to save the account information. The account is saved.

7. If you selected Access Provider, an Interfaces area appears.
   1. In the Interfaces area, select Add. The Vendor Interface Details page appears, where you can configure interfaces to describe the administrative access to services that manage e-resources.

   ![Vendor Interface Details Page](image)

   **Vendor Interface Details Page**

   2. In the Interface name field, either enter part or all of an existing interface name and select the matching interface from the drop-down list. If the name used is not found in the community zone, it can be used to create a new local interface for this vendor.

   3. Enter an interface description, select a status, and add an optional note. Select Save to save the interface. For details on editing a vendor interface, see Editing Vendor Interface Information.

8. If you selected Governmental, a TAX Percentage area and field appears. Enter a numerical value for the tax to be administered. This is the percentage that will be calculated from the PO line amount of the regular invoice (total less discount, not including shipping or other charges) in order to create a special tax-only governmental invoice. After you save the vendor, the vendor gains the vendor type Governmental. The governmental vendor sends a separate invoice containing only the use tax on an invoice's charges, according to the value entered in Tax percentage. For more information about how Alma handles VAT, see How Alma Handles VAT Payments.

   **Note**

   There can be only one vendor with the type Governmental in an institution.

9. In the Contact Information tab, enter the address, phone number, email address, and web address information for the vendor.

   Select Preferred address for an address to be the default address used for the account. If there is no address specified for this type of correspondence (such as Claims, Orders, Payment, or any other address type value selected in the Add Address dialog box), the preferred address is used. If multiple addresses are configured and no address is assigned as the preferred address, the first address listed on the Vendor Account Details page acts as the
preferred address.

Several entries may be provided for each method of contact, with an indication of the type or purpose for each method (such as shipping or billing). The information is stored at the vendor level and linked from the vendor account.

When an email in the vendor emails list is marked as claim, even though there is a preferred email (not marked as claim) the claim letter will be sent to the claim email. The email used is dependent on the following priority:

- A preferred email address with a claim type
- An email address of type claim
- A regular email address (not preferred and not claim)

**Note**

If the parameter `acq_use_vendor_account_email` is set to true, the vendor account email address (if it exists) is preferred over the vendor email address for emails sent by the following letters (not for emails sent using the Communications tab): Order List Letter (letter code: OrderListLetter), PO Line Cancellation Letter (letter code: POLineCancellationLetter), PO Line Claim Letter (letter code: POLineClaimLetter), PO Line Renewal Letter (letter code: POLineRenewalLetter). See Configuring Other Settings.

10. In the **Contact People** tab, select **Add Contact** to enter names and other contact information for people who may be contacted directly, if necessary. The information is stored at the vendor level and linked from the vendor account. Adding a contact creates a contact user. You can send the person an email from the Managing Users page. See Managing Users.

11. In the **EDI (Electronic Data Interchange) Information** tab, enter the information that enables orders to the vendor and/or invoices from the vendor to be transmitted electronically, if the vendor you are defining supports EDI. For more information on this tab, see Electronic Data Interchange (EDI).

**Note**

- If you want to define two different vendors for an EDI vendor (for example, YBP-US and YBP-UK) and both vendors use the same input directory on the same server, ensure that you define only one of the vendors as supporting incoming files, such as invoices (by selecting the **Incoming** check box; the **POs** check box can be selected for both vendors) so that the incoming files do not get locked. Note that incoming EDI job history and reports will be available only for the vendor that supports incoming files.
- A vendor cannot be defined as an EDI vendor and have a non-EDI account. If you want to use the same vendor for non-EDI accounts, you must define another, non-EDI vendor and add the relevant accounts to this vendor.

12. To configure the **Usage Data** tab, see Managing SUSHI Accounts.

13. You can define an OASIS or Askews and Holts vendor in the **System Integration** tab. See Check Availability and Pricing.

14. The **Invoices** tab lists all the invoices associated with the vendor. Select the invoice number in the **Invoice #** column to view an invoice, or select **Edit** to edit an invoice. For more information on invoices, see Invoicing.

15. The **PO Lines** tab displays all PO lines whose vendor code is the current vendor. For details on creating PO lines, see Creating PO Lines.

16. In the **Communications** tab, send or reply to email messages to vendors, and record vendor responses to email
messages. Alma sends email messages directly to the vendor. All responses from the vendor, including those received by email or telephone conversations, must be entered manually in this tab. Attachments associated with any communication can also be saved and viewed in this tab. For more information on the Communications tab, see Communicating with Vendors.

### Note

In addition to users with the Vendor Manager role, users with the Purchasing Operator or Purchasing Manager roles can also communicate with vendors on this tab.

17. In the Attachments tab, include any attachments that you want to associate with the vendor. EDI files sent to or received from vendors, as well as the attachments that may have been sent with or received in any communication with vendors, appear automatically in this tab. For more information, see Attachments Tab.

18. In the Notes tab, add a note to associate with the vendor. For more information, see Notes Tab.

19. In the Analytics tab (the Vendor Analytics Report page), you can view analytics information about this vendor. Select Open in a new window to open the report in a new tab or Expand to open the report in Analytics to change the report parameters.

![Vendor Analytics Report Page](image)

20. Select Save to save the vendor information.

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### How Alma Handles VAT Payments

The following table presents how Alma handles VAT payments based on three key configurations:

- Whether the (non-governmental) vendor has an associated governmental vendor
- Whether the vendor is noted as Liable for VAT; see above
- Whether the VAT is reported for the invoice (either by selecting Report VAT or by manually entering the VAT amount)

<table>
<thead>
<tr>
<th>Governmental Vendor</th>
<th>Vendor Liable for VAT</th>
<th>VAT Reported in Invoice</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No special handling</td>
</tr>
<tr>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Before saving the invoice, Alma prompts you to confirm that VAT is included in the invoice amount,</td>
</tr>
<tr>
<td>Governmental Vendor</td>
<td>Vendor Liable for VAT</td>
<td>VAT Reported in Invoice</td>
<td>Result</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------</td>
<td>------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Even though VAT is not required for the vendor.</td>
</tr>
</tbody>
</table>

Before saving the invoice, Alma prompts you to confirm that VAT is not included in the invoice amount, even though VAT is required for the vendor.

| No                  | Yes                   | Yes                    | No special handling |
| Yes                 | No                    | No                     | No special handling |

Before saving the invoice, Alma prompts you to confirm that VAT is included in the invoice amount, even though VAT is not required for the vendor.

| Yes                 | No                    | Yes                    | Before saving the invoice, Alma prompts you to confirm that VAT is included in the invoice amount, even though VAT is required for the vendor. |
|                     |                       |                        | If you select to report VAT, the configured VAT amount for the governmental vendor is automatically added to the invoice and a separate invoice is generated for this amount to the governmental vendor. |
|                     |                       |                        | If you select to not report VAT, the invoice is saved without VAT. |

| Yes                 | Yes                   | Yes                    | Either the configured VAT for the governmental vendor (if you selected Report Tax), or the amount of VAT that you manually entered, is added to the invoice and a separate invoice is generated for this amount to the governmental vendor. |

---

### Editing Vendor Interface Information

A vendor interface (sometimes known as a platform) is a framework in which the vendor supplies electronic collections and resources to the institution. When ordering an electronic resource ([Manually Creating a PO Line](#)), you can associate the PO line to the vendor interface using the Access provider field.

Managing an interface includes configuring interface information and the administrative access to these interfaces at the vendor’s system. The configuration you enter here does not include the access to the resources themselves, which is configured when editing an electronic resource's service (see [Adding a Local Electronic Collection](#)). Much of the information you enter here is for informational purposes only, and has no effect on Alma's functionality. Your vendor should be able to supply you with any missing information.

Vendor interfaces appear in Analytics as **Platform** in Usage Data.

You can edit vendor interfaces on the Vendor Interface Details page ([Acquisitions > Acquisitions Infrastructure > Vendors](#)), select **Edit** in the row actions list for an Access Provider vendor and select **Edit** in the row actions list for an interface).
To edit vendor interface information:

1. On the Vendor Interface Details page, configure the following fields.
   - In the **Summary** tab, modify optional information and activate/deactivate the interface.
   - In the **Contact Information** tab, add an address, phone number, and email account for the vendor.

**Note**

- When configuring a vendor account, the **Preferred address** field is for information only and must be identical to the preferred address assigned to the vendor.
- If the parameter `acq_use_vendor_account_email` is set to **true**, the vendor account email address (if it exists) is preferred over the vendor email address. See [Configuring Other Settings](#).

2. In the **Administrative Information** tab, enter administrative details about the interface. This includes the username and password you might require to log into the vendor’s system in order to manage the interface. Note that this information is for administrative purposes only and has no actual functional effect on accessing the resource. The non-self explanatory fields displayed on this tab are described in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL Attributes</td>
<td></td>
</tr>
<tr>
<td>Online Admin Module</td>
<td>Whether resource attributes can be directly modified online by the subscribing institution.</td>
</tr>
<tr>
<td>Admin URI</td>
<td>The URI of the online administration module. The field is available if the value of <strong>Online admin module available</strong> field is assigned.</td>
</tr>
<tr>
<td>Linking Note</td>
<td>Information about external linking, such as implementation details, or other notes.</td>
</tr>
<tr>
<td>Open URI Compliant</td>
<td>Whether the electronic content is compliant with an open URI.</td>
</tr>
<tr>
<td>Admin URI type</td>
<td>The type of online administration module URI.</td>
</tr>
<tr>
<td>Support</td>
<td></td>
</tr>
<tr>
<td>Incident Log</td>
<td>A log of downtime and problem reports, as well as their resolution.</td>
</tr>
<tr>
<td>Hardware Requirements</td>
<td>Information about hardware requirements and restrictions – not visible to end users.</td>
</tr>
<tr>
<td>Internal</td>
<td></td>
</tr>
<tr>
<td>Hardware</td>
<td>Information about hardware requirements and restrictions – visible to end users.</td>
</tr>
<tr>
<td>Section</td>
<td>Field</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>Requirements Public</td>
<td></td>
</tr>
<tr>
<td>Software Requirements</td>
<td>Internal</td>
</tr>
<tr>
<td>Maintenance Window</td>
<td>Value</td>
</tr>
</tbody>
</table>

In the Access Information tab, enter administrative access details about the interface. This includes the username and password you might require to log into the vendor’s system in order to manage access to the interface. The non-self explanatory fields displayed on this tab are described in the following table:

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>IP Address Registration Method</td>
<td></td>
<td>The method by which IP addresses are sent to the product provider. Possible values are:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Online</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Provider</td>
</tr>
<tr>
<td>IP Address Note</td>
<td></td>
<td>Additional notes pertaining to IP address information.</td>
</tr>
<tr>
<td>IP Address Registration Instructions</td>
<td></td>
<td>The URI at which IP addresses are registered, the email address or contact role to which updates are sent, or other relevant instructions.</td>
</tr>
<tr>
<td>Access Note</td>
<td></td>
<td>Additional notes pertaining to access information.</td>
</tr>
<tr>
<td>Primary Access URI</td>
<td></td>
<td>The method of access, the location, and the file name of an e-product.</td>
</tr>
<tr>
<td>Implemented Authorization Method</td>
<td></td>
<td>Method of authorization. Possible values are:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Empty</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Certificate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• IP address</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• IP address + password</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Other</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Password</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Script</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Unrestricted</td>
</tr>
<tr>
<td></td>
<td></td>
<td>These values are pre-defined by Ex Libris.</td>
</tr>
<tr>
<td>Interface URI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Persistent URI</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
In the **Statistics Information** tab, enter details about the statistics information resulting from the usage of the interface. This includes the username and password you might require to log into the vendor’s system in order to manage statistical information about the interface. All of the information on this tab is for informational purposes, only. The non-self explanatory fields displayed on this tab are described in the following table:

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usage Statistics</td>
<td>Usage Stats Available</td>
<td>Whether usage statistics are available for the resource.</td>
</tr>
<tr>
<td>Usage Stats Delivery Method</td>
<td>The manner in which statistics are made available.</td>
<td></td>
</tr>
<tr>
<td>Usage Stats Frequency</td>
<td>The frequency with which statistics are made available. Possible values are:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Annual</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Bi-annual</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Monthly</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Quarterly</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● User-selectable</td>
<td></td>
</tr>
<tr>
<td></td>
<td>These fields can be customized by modifying the code table.</td>
<td></td>
</tr>
<tr>
<td>Usage Stats Delivery Address</td>
<td>The contact name within the library.</td>
<td></td>
</tr>
<tr>
<td>Linking Note</td>
<td>Information about external linking, such as implementation details, or other notes.</td>
<td></td>
</tr>
<tr>
<td>Statistics Note</td>
<td>Information about usage-related statistics.</td>
<td></td>
</tr>
<tr>
<td>Stats Format</td>
<td>The formats in which statistics are made available. Multiple formats can be entered, separated by a semicolon. Possible values are:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● HTML</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Delimited</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Excel</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● PDF</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● CSV</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● ASCII</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Other</td>
<td></td>
</tr>
<tr>
<td>Usage Stats Online Location</td>
<td>The online location where statistics can be accessed, such as a URL or file path.</td>
<td></td>
</tr>
<tr>
<td>Usage Stats Locally Stored</td>
<td>Information about and/or links to locally stored data.</td>
<td></td>
</tr>
</tbody>
</table>

In the **Inventory** tab, view the portfolios and electronic collections associated with the interface. Do one of the following:

- Select the electronic collection name to open the Electronic Collection Editor page. For details on the Electronic Collection Editor page, see [Adding a Local Electronic Collection](#).
- Select the name of the standalone portfolio you want to access. For details on working with portfolios, see
Managing Local Portfolios

- In the Notes tab, add, update, or delete notes for the vendor interface. For more information, see Notes Tab.

2. Select Save when you are done.

---

Editing Vendor or Vendor Account Information

You can update the information entered for a vendor or vendor account. This includes activating or deactivating the vendor or vendor account. A Vendor Account Manager can only manage the vendor account elements of the vendor record. A Vendor Manager can manage all elements of the vendor record.

To edit vendor information:

1. On the Search Vendors page (Acquisitions > Acquisitions Infrastructure > Vendors), select Edit in the row actions list for a vendor. The Summary tab of the Vendor Details page appears.
2. Edit the vendor information as required. For information on the tabs included on this page, see Adding a Vendor and Vendor Account.
3. Select Save to save your changes.

To edit vendor account information:

1. On the Vendor Details page (Acquisitions > Acquisitions Infrastructure > Vendors and select a vendor), select Edit in the row actions list for the specific vendor account whose information you want to update. The Vendor Details page appears.
2. Edit the vendor account information as required. For information, see Adding a Vendor and Vendor Account.

To link vendor account contact information to vendor contact information, select Link in the Contact Information or Contact People tab.

---

Vendor Account Details

---

Note

A vendor must have at least one vendor account in order to be an active vendor.

3. Select Save to save the vendor account.
Deleting a Vendor or Vendor Account

You can permanently delete a vendor or vendor account.

To delete a vendor:

On the Search Vendors page (Acquisitions > Acquisitions Infrastructure > Vendors), select Delete in the row actions list and select Confirm in the confirmation dialog box.

Note

A vendor with open orders cannot be deleted.

To delete a vendor account:

On the Vendor Details page (Acquisitions > Acquisitions Infrastructure > Vendors and edit a vendor), select Delete in the row actions list and select Confirm in the confirmation dialog box.

If you delete the last vendor account of a vendor, you must add a new, active vendor account or change the status of the vendor to inactive.
Managing COUNTER-Compliant Usage Data

Alma can collect and report on electronic resource usage statistics information supplied by content providers in COUNTER format. With access to these reports, librarians have more options for analyzing and understanding usage within their institutions. COUNTER reports may be presented in a variety of formats in Alma Analytics, as well as in specific cases in the Alma user interface.

COUNTER (Counting Online Usage of NeTworked Electronic Resources) compliant usage statistics is explained here: https://www.projectcounter.org/.

Many vendors can provide COUNTER statistics for your institution’s users’ usage. In some cases, you receive this information in a file and upload the information to Alma manually. In some cases your vendor supports the SUSHI protocol (Standardized Usage Statistics Harvesting Initiative), which allows Alma to automatically retrieve (harvest) and upload the data automatically. For more information about SUSHI, see http://www.niso.org/workrooms/sushi/.

For SUSHI vendors lists for R5 and R4, see the SUSHI Vendors List.

COUNTER R5 Report Types

COUNTER usage data is provided in many different prepackaged types (reports). As of January 2020, Alma is fully compliant with COUNTER release 5. In the description, platform refers to the vendor interface. In release 5, all SUSHI reports are returned in JSON format.

For more information, see here.  

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
<th>Manual Upload (xlsx, xls, csv, tsv, ssv, txt formats)</th>
<th>SUSHI Harvest or Manual Upload (JSON format)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TR</td>
<td>A customizable report detailing activity at the title level (journal, book, etc.) that allows the user to apply filters and select other configuration options.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>DR</td>
<td>A customizable report detailing activity by database that allows the user to apply filters and select other configuration options.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>PR</td>
<td>A customizable report summarizing activity across a content provider’s platforms that allows the user to apply filters and select other configuration options.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_J4</td>
<td>Breaks down the usage of journal content, excluding Gold Open Access content, by year of publication (YOP), providing counts for the Metric_Types Total_Item_Requests and Unique_Item_Requests. Provides the details necessary to analyze usage of content in backfiles or covered by perpetual access agreement. Note that COUNTER reports do not provide access model or perpetual access rights details.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>PR_P1</td>
<td>Platform-level usage summarized by Metric_Type.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_B2</td>
<td>Reports on Access Denied activity for books where users were denied access because simultaneous-use licenses were exceeded or their institution did not have a license for the book.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Report Type</td>
<td>Description</td>
<td>Manual Upload (xlsx, xls, csv, tsv, txt formats)</td>
<td>SUSHI Harvest or Manual Upload (JSON format)</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>-------------------------------------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>DR_D2</td>
<td>Reports on Access Denied activity for databases where users were denied access because simultaneous-use licenses were exceeded or their institution did not have a license for the database.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_J2</td>
<td>Reports on Access Denied activity for journal content where users were denied access because simultaneous-use licenses were exceeded or their institution did not have a license for the title.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_B3</td>
<td>Reports on book usage showing all applicable Metric_Types broken down by Access_Type.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_B1</td>
<td>Reports on full-text activity for books, excluding Gold Open Access content, as Total_Item_Requests and Unique_Item_Requests. The Unique_Item_Requests provides comparable usage across book platforms. The Total_Item_Requests shows overall activity; however, numbers between sites will vary significantly based on how the content is delivered (e.g. delivered as a complete book or by chapter).</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>DR_D1</td>
<td>Reports on key Searches, Investigations and Requests metrics needed to evaluate a database.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_J3</td>
<td>Reports on usage of journal content for all Metric_Types broken down by Access_Type.</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>TR_J1</td>
<td>Reports on usage of journal content, excluding Gold Open Access content, as Total_Item_Requests and Unique_Item_Requests. The Unique_Item_Requests provides comparable usage across journal platforms by reducing the inflationary effect that occurs when an HTML full text automatically displays and the user then accesses the PDF version. The Total_Item_Requests shows overall activity.</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

## COUNTER R4 Report Types

COUNTER usage data is provided in many different prepackaged types (reports). Alma supports the following types (as of May 2017), depending on the COUNTER release version and method of entering the data. In the description, platform refers to the vendor interface.

### Supported COUNTER Report Types

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
<th>COUNTER Release</th>
<th>Manual Upload (xlsx, xls, csv, txt, tsv formats)</th>
<th>SUSHI Harvest or Manual Upload (XML format)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BR1</td>
<td>Book Report: Successful Title Requests by Month and Title</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>BR2</td>
<td>Book Report: Successful Section Requests by Month and Title</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>BR3</td>
<td>Book Report: Access Denied to Content Items by Month, Title, and Category</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>BR4</td>
<td>Book Report: Access Denied to Content Items by Month, Platform, and Category</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>BR5</td>
<td>Book Report: Total searches by Month and Title</td>
<td>R4</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>CR1</td>
<td>Consortial Report</td>
<td>R4</td>
<td>Planned</td>
<td>Planned</td>
</tr>
<tr>
<td>DB1</td>
<td>Database Report: Searches, Result Clicks, and Record Views by Month and Platform</td>
<td>R3</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Report Type</td>
<td>Description</td>
<td>COUNTER Release</td>
<td>Manual Upload (xlsx, xls, csv, txt, tsv formats)</td>
<td>SUSHI Harvest or Manual Upload (xml format)</td>
</tr>
<tr>
<td>-------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-----------------</td>
<td>-------------------------------------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>DB1</td>
<td>Database Report: Searches, Result Clicks, and Record Views by Month and Platform</td>
<td>R4 Y</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>DB2</td>
<td>Database Report: Access Denied by Month, Database, and Category</td>
<td>R4 Y</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>JR1</td>
<td>Journal Report: Successful Full-Text Article Requests by Month and Journal</td>
<td>R3/R4 Y</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>JR1 GOA</td>
<td>Journal Report: Successful Gold Open Access Full-Text Article Requests by Month and Journal</td>
<td>R4 Y</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>JR1a</td>
<td>Journal Report: Successful Full-Time Article Requests from an Archive by Month and Journal</td>
<td>R3/R4 Y</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>JR2</td>
<td>Journal Report: Access Denied to Full-Text Articles by Month, Journal, and Category</td>
<td>R4 Y</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>JR5</td>
<td>Journal Report: Successful Full-Text Article Requests by Year-of-Publication (YOP) and Journal</td>
<td>R4 Y</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>MR1</td>
<td>Multimedia Report: Successful Full Multimedia Content Unit Requests by Month and Collection</td>
<td>R4 Y</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>PR1</td>
<td>Total searches, result selects, and record views by Month and Platform (previously DB3)</td>
<td>R4 Y</td>
<td></td>
<td>Y</td>
</tr>
</tbody>
</table>

**User Roles Summary**

Users with the following roles can perform tasks related to COUNTER compliant user statistics:

- **Acquisitions Administrator** - Configure COUNTER subscribers and activate, deactivate, or manually run the automatic harvesting job.
- **Vendor Manager** - View usage data related to a particular vendor, manually harvest data for the vendor, manually upload data for the vendor, and manage any uploaded data files.
- **Usage Data Operator** - Manually upload or delete data for any vendor, manage the uploaded data files, and view missing COUNTER data.
- **General System Administrator** - Activate, deactivate, schedule, or monitor the automatic harvesting job, view the job's history, report, and events, and configure email notifications for the job.

**Configuring COUNTER Subscribers**

To configure COUNTER subscribers, you must have the following role:

- **Acquisitions Administrator**

In nearly all cases, an institution has one *subscriber* which is the name of the institution. In these cases, there is no need to coordinate anything with the vendor regarding your institution's subscriber name.

In rare cases, an institution has multiple subscribers. This is used as an additional means of filtering data in Alma Analytics. To effectively use multiple subscribers, your institution must coordinate with the COUNTER vendors to send separate reports for each campus, according to the IP address ranges of the campus that accessed each electronic resource. In
these cases, your institution adds multiple subscribers to Alma and uploads each report using the relevant subscriber.

Alma requires you to define at least one subscriber. This documentation assumes that you define only one subscriber.

---

**Note**

When you manually upload a data file, the file is considered new data if several key fields are different (vendor, dates, etc), including subscriber. Uploading the same data file a second time overwrites the data from the first upload. If you change the subscriber in the data to a different, valid subscriber, the data is uploaded as new data.

---

You configure subscribers on the Subscribers code table (Configuration Menu > Acquisitions > General > Subscribers). For more information about code tables, see Code Tables.

![Subscribers Code Table](image)

Subscribers Code Table

As noted above, you must configure at least one subscriber.

---

**Managing SUSHI Accounts**

To configure SUSHI accounts, you must have the following role:

- Vendor Manager

SUSHI accounts enable Alma to automatically retrieve COUNTER reports from vendors. You create a SUSHI account for each vendor and for each report type; a single vendor may require multiple SUSHI accounts, one for each report type. For an R5 SUSHI account, you can create a single account for all of the necessary report types.

For the list of SUSHI-certified vendors for Release 5, see the [SUSHI Vendors List](#).

For the list of SUSHI-certified vendors for Release 4, see the [SUSHI Vendors List](#).

---

**Note**

You do not have to create a SUSHI account to retrieve COUNTER data from a vendor. Whether or not you configure a SUSHI account for a vendor, a vendor can provide you COUNTER data by some other means for you to upload manually to Alma.

---

You manage SUSHI accounts on the Usage Data tab of the Vendor Details page (Acquisitions > Acquisitions Infrastructure > Vendors, select Edit in the row actions list for the vendor and select the Usage Data tab).
In the Uploaded Files section, the Report Success Rate column indicates the global success rate of the report type for that period, defined as the number of successes divided by the number of failures for the contributed accounts IDs. The statistics are calculated from two months prior to the current month and are updated roughly two days after the SUSHI report is run. The number links to the relevant SUSHI Account Details page.

To add a SUSHI account:

**Note**

While the procedure below indicates that you should add the account for a vendor on the Usage Data tab of that vendor, in fact you can add an account for any vendor on the Usage Data tab of any vendor. The vendor that is contacted by the SUSHI job is determined solely by the URL and other information you add when configuring the account, not the tab on which you enter the information. Nevertheless, Ex Libris recommends that you add the account for each vendor on the Usage Data tab of that vendor, for organizational purposes.

For vendors that are actually subscription agents for other vendors (access providers or publications), each report type from each access provider or publication requires an additional SUSHI account for each access provider or publication; multiple reports from the same vendor require multiple SUSHI accounts.

1. Ensure that a subscriber was defined for your institution. See Configuring COUNTER Subscribers.
2. Select Add SUSHI Account.
3. If Release 5 is enabled, select either Release 4 or Release 5. The SUSHI Account Details page appears.
4. Enter the vendor name in SUSHI Account. If you have selected release 5, only release 5 vendors appear in the drop-down list. After you enter three letters in this field, a drop-down list of SUSHI-certified vendors appears (this list is predefined by Ex Libris; see the SUSHI Vendors List). If you select any of the vendors from this list, Vendor URL is prefilled with the correct URL for the vendor (other information may also be prefilled). However, you do not have to select a predefined certified vendor; you can enter any value you like.

A quick pick list option is available to search the vendors.

Watch the Add SUSHI Account to Vendor via Search video (1:34 min).

5. If you have not selected a vendor from the list, enter the URL in Vendor URL and select a subscriber in Subscriber. If needed, enter a URL in Override URL. Either the Override URL or the Vendor URL must be populated. If the Vendor URL for a SUSHI account changes in the list of SUSHI-certified vendors, the Vendor URL is updated. The Override URL is not changed by the update.

6. Enter contact information in Contact Information. Typically, this will be a URL or email account of the vendor.

7. Enter the required credentials in the Request Details area. Some information may already be prefilled; your vendor will supply you with the required information for this area. For information on special cases, see the SUSHI Vendors List.

8. For Release 4 accounts, select the Report Type. For Release 5 accounts, select Add Report Type for each of the report types needed on this account.

9. To test the connection, select Test Connection. For Release 4 accounts, if there is an error, an error message appears at the top of the page. Select Test Connection with Response to view a Zip file containing both the SUSHI request and response packages (in XML) sent to/from the vendor. These packages may help you debug the connection. For Release 5 accounts, a JSON file is displayed with the connection status, and any errors, if applicable. You should also select Test Connection with Response for each report type from its respective row action menu to
10. Select **Contribute** to contribute a SUSHI account to the Community Zone.

11. When you are done, select **Save**. The account is saved and appears in the **Usage Data** tab.

You can delete the account by selecting **Actions > Delete** in the account row on the **Usage Data** tab.

On the Search Vendors page (**Acquisitions > Acquisitions Infrastructure > Vendors**), you can filter the table to display only SUSHI-enabled vendors by selecting **SUSHI Vendor** in the **Vendor Type** filter. Note that a vendor may be SUSHI-enabled even if it does not have a SUSHI account.

---

**Managing SUSHI Harvesting**

To manage the SUSHI harvesting job, you must have one of the following roles (see below for details):

- Acquisitions Administrator
- Vendor Manager
- General System Administrator

By default, the **SUSHI harvesting job** harvests all COUNTER data from all active SUSHI accounts. The job runs some time between Friday evening and Saturday morning, depending on your time zone. Before uploading, Alma checks whether overlapping data exists in the database, according to a unique combination of owner code (constructed from the customer ID and institution ID), subscriber, platform, publisher, measure type, and date. To avoid data duplication, it is recommended that you delete the previous SUSHI file before uploading a new one. It is possible, though, if you also harvest using a portal such as JUSP, that you may have a potential data duplication issue because the owner code is different and the data is therefore not recognized as duplicate data. When the job receives a response that indicates that the report will be available at a later time, Alma automatically retries to collect a report a random amount of time later. If the error persists, a number of such iterations are attempted, increasing the retry interval each time, until the attempt reaches a maximum number of retries.

The actions you can perform depend on your role.

- As an Acquisitions Administrator, you can activate, deactivate, or schedule this job, or run it manually.
- As a Vendor Manager, you can run the job manually for a single vendor account and view a history of how often this was performed.
- As a General System Administrator, you can activate, deactivate, schedule, or monitor the job, view a job's history, report, and events, and configure email notifications for the job on the Monitor Jobs page. For more information, see **Viewing Scheduled Jobs**, **Viewing Running Jobs**, **Viewing Completed Jobs**.

---

**Note**

- PR1 reports should have the following data in cells 1B and 1C:
  - **Cell 1B** - Total Searches, Result Clicks and Record Views by Month and Platform
To manage the SUSHI Harvesting job as an Acquisitions Administrator or General System Administrator:

On the Acquisitions Jobs Configuration Page (Configuration Menu > Acquisitions > General > Acquisition Jobs Configuration), perform one of the following actions in the SUSHI Harvesting Job area:

- To deactivate the SUSHI harvesting job, select **Inactive** or select **Not scheduled** for SUSHI harvesting job schedule.
- To activate the SUSHI harvesting job, select **Active** and select a valid scheduling option in SUSHI harvesting job (options exist for weekly or monthly job runs).
- To run the job immediately, select **Run Now**.

To manage the SUSHI Harvesting job as a Vendor Manager:

On the Usage Data tab of the Vendor Details page (Acquisitions > Acquisitions Infrastructure > Vendors, select **Edit** in the row actions list for the vendor and select the Usage Data tab), perform one of the following actions:

- To run the job immediately for a vendor account, select **Harvest Now** in the row actions list and select **Confirm** in the confirmation dialog box. For Release 5 accounts, you can also edit the SUSHI account, and harvest each report type separately.
- To manage reports received from the vendor, select **View, Download, or Delete** from the row actions list.
- To view a history of these account-specific job runs, select **View History** in the row actions list. The SUSHI Harvest History page appears.

---

In some cases, vendors have sent PR1 reports with the following (incorrect) data in cells 1B and 1C:

- **Cell 1B** - Total Searches
- **Cell 1C** - Result Clicks and Record Views by Month and Platform

The SUSHI harvesting job reports an error in this case. If you see an error in the job report, check the report sent from the vendor. In the above case, correct the data and then manually upload the report; see Manually Uploading and Deleting COUNTER Data.
SUSHI Harvest History

Select **File Details** in the row actions list to see the report or response from the vendor. You can download the file by selecting **Download**. You can download the file even if it was deleted (on the **Usage Data** tab of the Vendor Details page or the **Uploaded Files** tab of the Usage Data Loader page).

SUSHI File Details

---

### Manually Uploading and Deleting COUNTER Data

To manually upload COUNTER data or manage this data after it was uploaded, you must have one of the following roles (see below for details):

- Usage Data Operator
- Vendor Manager

A vendor can send you COUNTER data to upload manually to Alma. The data that you upload must be in one of the following formats: **xlsx**, **xls**, **csv**, **txt**, or **tsv**. For Release 4 accounts, you can also manually upload data in **xml** format (see [COUNTER Report Types](#)). For release 5, the manual data upload returns reports in JSON format.

A Usage Data Operator can upload data for any vendor and manage all uploads on the **Uploaded Files** tab of the Usage Data Loader page (**Acquisitions > Import > Load Usage Data**).
A Vendor Manager can upload data and manage uploads for a single vendor at a time on the Usage Data tab of the Vendor Details page (Acquisitions > Acquisitions Infrastructure > Vendors, select Edit in the row actions list for the vendor and select the Usage Data tab).

Before uploading, Alma checks whether overlapping data exists in the database, according to a unique combination of owner code, subscriber, platform, publisher, measure type, and date (the owner code in Alma is built out of the customer ID and the institution ID). If data is considered duplicate, the following notification message is displayed: **Continue with the upload will delete the old data - Are you sure you want to continue?** If you continue, the old data is overwritten by the new data. In the case of a SUSHI harvest (where the data is not uploaded in a manual manner and therefore no message appears to the staff user), the duplicate data is automatically overwritten.

After uploading the data, the operator/manager can perform the following actions:

- View information about the file and the imported data (View).
- Download the file (Download).
- Delete the file and its imported data (Delete).
- Reload the file if it did not run successfully (Reload). The action is visible only for Invalid and Partially Loaded SUSHI files.

Watch the [Reload Usage Data Files That Failed to Load](#) video (1:10 min).

A Usage Data Operator can also delete data according to its file ID on the Delete Usage Data page (Acquisitions > Import > Delete Usage Data). This is helpful when usage data was migrated to Alma and appears (with its file ID) in Analytics.

### To manually upload COUNTER data:

**Note**

See the note about errors in PR1 reports from some vendors in Managing SUSHI Harvesting. If you see this error in a PR1 report, manually correct the report before uploading it.

1. On the Uploaded Files tab of the Usage Data Loader page (as a Usage Data Operator), or on the Usage Data tab of the Vendor Details page (as a Vendor Manager), select Upload File and enter the following.
   - **Vendor** (Usage Data Loader page, only) - The vendor associated with the uploaded data. Note that the vendor does not have to be a SUSHI vendor.
1. Select **Upload File**. Browse for the file to upload. Select **Subscriber** to select the subscriber.

2. Select **Upload File**. The file is uploaded and the data imported into Alma. Information about the file, including its status, appears in the table.

**To manually delete COUNTER data according to its file ID:**

On the Delete Usage Data page, enter the file ID and select **Delete File** and select **Confirm** in the confirmation dialog box.

A Delete Usage Data job runs. See [Viewing Completed Jobs](#) for information on monitoring the job and viewing the report.

---

### Viewing Usage Data

To view usage data you must have the following role:

- Usage Data Operator

You can view COUNTER usage data by subscriber, platform (vendor interface), report type and measurement, and month on the Missing Data tab of the Usage Data Loader page (Acquisitions > Import > Load Usage Data; select the Monthly Usage Data tab). Contact your vendor for any missing information.

#### Usage Data Loader, Monthly Usage Data Tab

Select a year or report type and measurement using the filter drop-down lists (Year or Measured By, respectively). Any year for which you have at least some COUNTER data appears in the Year filter.

The columns on this page include:

- **Subscriber**
- **Platform**
- **Measured By** - Report type and measurement. If you do not select anything in the Measured By filter, all report types and measurements appear.
- **Jan .. Dec** - Only the months of the year selected in the Year filter appear. The green icon (✓) indicates that the usage report file was successfully uploaded. The yellow icon (!) indicates that the connection to the vendor was successful, but the vendor did not send any data. While the red icon (✗)
) indicates that the vendor connection attempt was unsuccessful.
SUSHI Vendor Lists

Many vendors can provide COUNTER statistics for your institution’s users’ usage. In some cases, you receive this information in a file and upload the information to Alma manually. In some cases your vendor supports the SUSHI protocol (Standardized Usage Statistics Harvesting Initiative), which allows Alma to automatically retrieve (harvest) and upload the data automatically. For more information about SUSHI, see http://www.niso.org/workrooms/sushi/.

The Non-Validated SUSHI Vendors table contains vendors which were reported as not harvesting usage data as expected. Please see the Status column for specific information.

### Non-Validated SUSHI Vendors

<table>
<thead>
<tr>
<th>Name</th>
<th>Vendor URL</th>
<th>Status</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>DeGruyter (Walter De Gruyter)</td>
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### SUSHI-Certified Vendors Release 5

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### SUSHI-Certified Vendors Release 4

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<td>Akademiai</td>
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<td><a href="http://akademiai.com/api/soap/analytics/SushiService">http://akademiai.com/api/soap/analytics/SushiService</a></td>
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<td>Allen Press Pinnacle</td>
<td>BR2, J5, JR1GOA, JR1, PR1, BR3</td>
<td><a href="http://pinnacle.allenpress.com/api/soap/analytics/SushiService">http://pinnacle.allenpress.com/api/soap/analytics/SushiService</a></td>
<td>Connection requires Requester ID and Customer ID</td>
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<td>American Economic Association</td>
<td>JR5, JR1, PR1</td>
<td><a href="http://pubs.aeaweb.org/api/soap/analytics/SushiService">http://pubs.aeaweb.org/api/soap/analytics/SushiService</a></td>
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<td>American Mental Health Counselors Association</td>
<td>BR2, J5, JR1GOA, JR1, PR1, BR3</td>
<td><a href="http://amhcajournal.org/api/soap/analytics/SushiService">http://amhcajournal.org/api/soap/analytics/SushiService</a></td>
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<td>American Meteorological Society</td>
<td>JR5, JR1GOA, JR1, PR1</td>
<td><a href="http://journals.ametsoc.org/api/soap/analytics/SushiService">http://journals.ametsoc.org/api/soap/analytics/SushiService</a></td>
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<tr>
<td>American Podiatric Medical Association</td>
<td>JR1, JR2, JR1GOA, JR5, BR3, PR1</td>
<td><a href="http://www.japmaonline.org/api/soap/analytics/SushiService">http://www.japmaonline.org/api/soap/analytics/SushiService</a></td>
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<td>American Roentgen Ray Society</td>
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<td>American Society of Tropical</td>
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<td><a href="https://www.ajtmh.org/admin/statistics/sushiservice">https://www.ajtmh.org/admin/statistics/sushiservice</a></td>
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<td>Medicine and Hygiene</td>
<td>BR2, JR5, JR1, PR1, JR1a</td>
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<tr>
<td>American Thoracic Society</td>
<td>BR2, JR5, JR1, PR1, BR1,</td>
<td>Use the URL: http://&lt;username&gt;:&lt;password&gt;@www.ams.org/SushiService/BookAndJournalStats</td>
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<tr>
<td>AMS (American Mathematical Society) Books and Journal Stats (for JR1, JR5, BR1, BR2, BR3)</td>
<td>JR1, JR5, JR1, PR1, BR1, DB1, PR1, BR3</td>
<td><a href="http://username:password@www.ams.org/...ndJournalStats">http://username:password@www.ams.org/...ndJournalStats</a></td>
<td>Note the colon : between the username and password in the above URL. Usernames typically have an asterisk, for example ABC*DEF. Enter the username in the User Name and Customer ID fields. Enter the password in the Password and Requester ID fields.</td>
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<tr>
<td>AMSUS (The Society of Federal Health Professionals)</td>
<td>JR5, JR1, PR1</td>
<td><a href="http://militarymedicine.amsus.org/ap...s/SushiService">http://militarymedicine.amsus.org/ap...s/SushiService</a></td>
<td>Note the colon : between the username and password in the above URL. Usernames typically have an asterisk, for example ABC*DEF. Enter the username in the User Name and Customer ID fields. Enter the password in the Password and Requester ID fields.</td>
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<td>Annual Reviews</td>
<td>JR5, JR1GOA, JR1, JR1a, PR1</td>
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<td>APS (American Physical Society)</td>
<td>JR5, JR1GOA, JR1, JR1a, PR1</td>
<td><a href="https://inqwell.squidsolutions.com/release/apssushi">https://inqwell.squidsolutions.com/release/apssushi</a></td>
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<td>JR1, DB1</td>
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<tr>
<td>ASCE (American Society of Civil)</td>
<td>BR2, JR5</td>
<td><a href="https://ascelibrary.org/api/soap/an...s/SushiService">https://ascelibrary.org/api/soap/an...s/SushiService</a></td>
<td>Connection requires Requester ID and Customer ID</td>
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<tr>
<td>Engineers)</td>
<td>JR1GOA, JR1, PR1, BR3</td>
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<tr>
<td>ASCO (American Society of Clinical Oncology)</td>
<td>JR1GOA, JR1, JR2, JR5, PR1</td>
<td><a href="http://ascopubs.org/api/soap/analytics/SushiService">http://ascopubs.org/api/soap/analytics/SushiService</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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<tr>
<td>ASM (American Society for Microbiology)</td>
<td>BR2, JR1GOA, JR1, PR1, BR3</td>
<td><a href="https://www.asmscience.org/admin/sta.../sushiservice">https://www.asmscience.org/admin/sta.../sushiservice</a></td>
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<tr>
<td>AVMA (American Veterinary Medical Association)</td>
<td>JR5, JR1, PR1</td>
<td><a href="https://avmajournals.avma.org/api/so.../SushiService">https://avmajournals.avma.org/api/so.../SushiService</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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<td>Berghahn Journals</td>
<td>JR5, JR1GOA, JR1</td>
<td><a href="https://ams.berghahnjournals.com/1/s_hiService?wsdl">https://ams.berghahnjournals.com/1/s_hiService?wsdl</a></td>
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<td>BioMed Central</td>
<td>JR5, JR1GOA, JR1</td>
<td><a href="http://services.springer.com/sushi/bmc">http://services.springer.com/sushi/bmc</a></td>
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<tr>
<td>BioOne</td>
<td>BR2, JR5, JR1GOA, JR1, PR1, BR3</td>
<td><a href="https://sushi5.scholarlyiq.com/counter/r5">https://sushi5.scholarlyiq.com/counter/r5</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
</tr>
<tr>
<td>Bone &amp; Joint Publishing</td>
<td></td>
<td><a href="https://online.boneandjoint.org.uk/a.../SushiService">https://online.boneandjoint.org.uk/a.../SushiService</a></td>
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<tr>
<td>Brepols</td>
<td>BR2, JR5, JR1GOA, JR1, PR1, BR3</td>
<td><a href="http://www.brepolsonline.net/api/soa.../SushiService">http://www.brepolsonline.net/api/soa.../SushiService</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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<tr>
<td>Brill</td>
<td>BR2, BR3, JR1, JR2, PR1</td>
<td><a href="https://ams.brill.com/1/services/SushiService">https://ams.brill.com/1/services/SushiService</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
</tr>
</tbody>
</table>

Message from BioOne to Ex Libris 2019.02.02:

With the launch of the new BioOne Complete platform on January 1 2019 and the corresponding change to our new SUSHI server hosted by Scholarly IQ (https://sushi5.scholarlyiq.com/counter/r5), BioOne now only supports SUSHI harvesting for COUNTER R5 reports. Historical COUNTER R4 reports can be manually downloaded from our reporting dashboard.

The first COUNTER 5 reports (for January 2019) will be available in February and those will be available via our new SUSHI server (https://sushi5.scholarlyiq.com/counter/r5), but reports for usage pre-January 2019 will be in COUNTER 4 format and can only be manually downloaded.
<table>
<thead>
<tr>
<th>Name</th>
<th>Report Types</th>
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<tbody>
<tr>
<td>Brill Online Books and Journals (BrillOnline Books and Journals)</td>
<td>BR2, JR5, JR1GOA, JR1, BR1, PR1, BR3</td>
<td><a href="https://ams.brill.com/all/services/SushiService">https://ams.brill.com/all/services/SushiService</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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<tr>
<td>Britannica</td>
<td></td>
<td><a href="http://stats.eb.com/webservice/Sushi/Endpoint">http://stats.eb.com/webservice/Sushi/Endpoint</a></td>
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<tr>
<td>British Institute of Radiology</td>
<td>JR5, JR1GOA, JR1, PR1, BR3</td>
<td><a href="http://www.birpublications.org/api/s...s/SushiService">http://www.birpublications.org/api/s...s/SushiService</a></td>
<td></td>
</tr>
<tr>
<td>Cambridge University Press</td>
<td>BR2, JR1:R3, JR5, JR1GOA, JR1a:R3, JR1, BR1, PR1, JR1a, BR3</td>
<td><a href="http://sushi.cambridge.org/GetReport">http://sushi.cambridge.org/GetReport</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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<tr>
<td>Canadian Science Publishing</td>
<td>JR5, JR1GOA, JR1, PR1, BR3</td>
<td><a href="http://pubs.cig-acsg.ca/api/soap/analytics/SushiService">http://pubs.cig-acsg.ca/api/soap/analytics/SushiService</a></td>
<td></td>
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<tr>
<td>Canadian Science Publishing - Agricultural Institute of Canada</td>
<td>JR1</td>
<td><a href="http://pubs.aic.ca/api/soap/analytics/SushiService">http://pubs.aic.ca/api/soap/analytics/SushiService</a></td>
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<tr>
<td>CFA Publications</td>
<td>JR5, JR1, PR1</td>
<td><a href="http://www.cfapubs.org/api/soap/analytics/SushiService">http://www.cfapubs.org/api/soap/analytics/SushiService</a></td>
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<td>Compendex Engineering Village</td>
<td>DB1</td>
<td><a href="https://emetrics.engineeringvillage.../counter_sushi">https://emetrics.engineeringvillage.../counter_sushi</a></td>
<td>Enter <code>&lt;username&gt;/&lt;password&gt;</code> as the <strong>Requester ID</strong>. For example, if your username is <strong>orange</strong> and your password is <strong>apple</strong>, enter orange/apple for <strong>Requester ID</strong>, orange for <strong>User Name</strong>, and apple for <strong>Password</strong>.</td>
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<tr>
<td>Corrosion (The Journal of Science &amp; Engineering)</td>
<td>JR5, JR1GOA, JR1</td>
<td><a href="http://corrosionjournal.org/api/soap...s/SushiService">http://corrosionjournal.org/api/soap...s/SushiService</a></td>
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<tr>
<td>CRCnetBase (CRC netBase)</td>
<td>BR2, PR1, BR3</td>
<td><a href="http://www.crcnetbase.com/api/soap/analytics/SushiService">http://www.crcnetbase.com/api/soap/analytics/SushiService</a></td>
<td>Connection requires <strong>Requester ID</strong>, <strong>Customer ID</strong> and <strong>User Name</strong>.</td>
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<td>Credo Reference</td>
<td>BR2, PR1, BR3</td>
<td><a href="https://admin.credoreference.com/ser...s/sushiservice">https://admin.credoreference.com/ser...s/sushiservice</a></td>
<td>Requester ID should be your admin or stats user email.</td>
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<tr>
<td>CSJ (Chemical Society of Japan)</td>
<td>JR5, JR1GOA, JR1, PR1</td>
<td><a href="http://www.journal.csj.jp/api/soap/analytics/SushiService">http://www.journal.csj.jp/api/soap/analytics/SushiService</a></td>
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<td>De Gruyter Online (Walter DeGruyter Online)</td>
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<td><a href="https://ams.degruyter.com/1/services/SushiService">https://ams.degruyter.com/1/services/SushiService</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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<td>Duncker &amp; Humblot</td>
<td>JR5, JR1, PR1</td>
<td><a href="http://ejournals.duncker-humblot.de/.../SushiService">http://ejournals.duncker-humblot.de/.../SushiService</a></td>
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<tr>
<td>EBSCO Host (EBSCOHost) (http)</td>
<td>BR2, JR5, JR1, BR1, DB1, PR1, BR3</td>
<td><a href="http://sushi.ebscohost.com/R4/SushiService.svc">http://sushi.ebscohost.com/R4/SushiService.svc</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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<td>EBSCO Host (EBSCOHost) (https)</td>
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<td><a href="https://sushi.ebscohost.com/R4/SushiService.svc">https://sushi.ebscohost.com/R4/SushiService.svc</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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<td>Edinburgh University Press</td>
<td>JR5, JR1GOA, JR1, PR1, JR1a</td>
<td><a href="http://www.eupublishing.com/api/soa.../SushiService">http://www.eupublishing.com/api/soa.../SushiService</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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<td>Edward Elgar Publishing</td>
<td>BR2, JR5, JR1, PR1, BR3</td>
<td><a href="https://ams.elgaronline.com:443/1/services/SushiService">https://ams.elgaronline.com:443/1/services/SushiService</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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<tr>
<td>Elsevier (ScienceDirect &amp; Scopus)</td>
<td>BR2, JR5, JR1;R3, JR1GOA, JR1, PR1, JR2, BR3</td>
<td><a href="https://services.elsevier.com/SushiW...hiServicePort/">https://services.elsevier.com/SushiW...hiServicePort/</a></td>
<td>Enter <strong>SUSHI-ALMA</strong> for <strong>Requester ID</strong>. If you previously used UStat, this ID is different from the one your institution used in UStat, which was <strong>SUSHI-Exlibris</strong>. Ex Libris changed the ID for all existing customers for the May 2017 release. For institutions currently setting up Alma SUSHI accounts while still working in UStat (customers still implementing Alma), contact Elsevier customer support to ensure that your SUSHI-ALMA account is active. For these customers, Test Connection does not work for Elsevier, because Elsevier supports only one active account per institution and the UStat account is still active.</td>
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<tr>
<td>Emerald Insight</td>
<td>BR2, JR5, JR1GOA, JR1, PR1, JR1a, BR3</td>
<td><a href="https://connect.liblynx.com/sushi">https://connect.liblynx.com/sushi</a></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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<td>EMS (European Mathematical Society)</td>
<td>JR1;R3</td>
<td><a href="https://www.ems-ph.org/stats/sushi.php">https://www.ems-ph.org/stats/sushi.php</a></td>
<td>R4 reports are only available between Jan 2017 and March 2019.</td>
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<td>Endocrine Society Journals</td>
<td>BR2, JR5, JR1GOA, JR1</td>
<td><a href="http://press.endocrine.org/api/soap/.../SushiService">http://press.endocrine.org/api/soap/.../SushiService</a></td>
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<td>Families in Society</td>
<td>BR2, JR5, JR1GOA, JR1, PR1, BR3</td>
<td><code>http://familiesinsocietyjournal.org/...s/SushiService</code></td>
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<td>FASEB Journal</td>
<td>BR2, JR5, JR1GOA, JR1, PR1, BR3</td>
<td><code>http://www.fasebj.org/api/soap/analytics/SushiService</code></td>
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<td>Future Medicine</td>
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<td><code>http://www.futuremedicine.com/api/so...s/SushiService</code></td>
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<td>Future Science (http)</td>
<td>JR5, JR1GOA, JR1, PR1</td>
<td><code>http://www.future-science.com/api/so...s/SushiService</code></td>
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<td>Future Science (https)</td>
<td>JR5, JR1GOA, JR1, PR1</td>
<td><code>https://www.future-science.com/api/s...s/SushiService</code></td>
<td>Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong></td>
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</table>
| Gale (Galegroup)            |                               | `http://usagereports.galegroup.com/sushi/ws`                              | Requester Name = Your institution's name  
Requester ID = should be [gale_institution_code/gale_location_code]  
Customer ID = should be [loc=gale_location_code]  
Customer Name = should be [gale_admin_password]  
Requester Email = valid email address                                                                                           |
<p>| GeoScienceWorld             | BR2, JR5, JR1GOA, JR1, PR1, BR3 | <code>http://sitemap.geoscienceworld.or...shiService.svc</code>                      |                                                                                        |
| Guilford Press (Guilford Journals) | JR5, JR1, PR1 | <code>https://guilfordjournals.com/api/soa...s/SushiService</code>                    |                                                                                        |
| Hanser                      | BR2, JR5, JR1, PR1, BR3        | <code>http://www.hanser-elibrary.com/api/s...s/SushiService</code>                     |                                                                                        |
| Harvard Educational Publishing | BR2, JR5, JR1GOA, JR1, PR1, BR3 | <code>http://hepgjournals.org/api/soap/ana...s/SushiService</code>                    |                                                                                        |
| Health Affairs              | JR5, JR1,                      | <code>http://www.healthaffairs.org/api/soa...s/SushiService</code>                    | Connection requires <strong>Requester ID</strong> and <strong>Customer ID</strong>                               |</p>
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<td>HighWire Press</td>
<td>BR2, JR5, JR1GOA, JR1, PR1, JR1a</td>
<td><a href="http://sushi.highwire.org/services/SushiService">http://sushi.highwire.org/services/SushiService</a></td>
<td>Connection requires Requester ID and Customer ID</td>
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<td>For the Customer ID: Make it the email of your HighWire Portal account, followed by a pipe (</td>
</tr>
<tr>
<td>Hogrefe</td>
<td>JR5, JR1GOA, JR1, PR1</td>
<td><a href="http://econtent.hogrefe.com/api/soap...s/SushiService">http://econtent.hogrefe.com/api/soap...s/SushiService</a></td>
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<tr>
<td>Human Kinetics</td>
<td>JR5, JR1GOA, JR1, PR1</td>
<td><a href="http://journals.humankinetics.com/ap...s/SushiService">http://journals.humankinetics.com/ap...s/SushiService</a></td>
<td>Connection requires Requester ID and Customer ID</td>
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<td></td>
<td>The Customer ID should include the leading zeros. For example &quot;0000248365&quot; and not &quot;248365&quot;.</td>
</tr>
<tr>
<td>ICE Virtual Library (Institution of Civil Engineers)</td>
<td>BR2, JR5, JR1GOA, JR1, PR1, BR3</td>
<td><a href="http://www.icevirtuallibrary.com/api...s/SushiService">http://www.icevirtuallibrary.com/api...s/SushiService</a></td>
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The Requester ID is the email username given to the institution during the initial registration to IEEE.
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<td>If your customer ID is 61333 then your Requester ID will be 61333:61333.</td>
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<td>You can use the IP authentication SUSHI service for Newsbank rather than username/ password authentication.</td>
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<td>The Requestor ID and Customer ID must be generated in the ProQuest ebook admin (LibCentral, in the Settings—System menu). You also need to include your Requester Email in your SUSHI settings, which is the same email that is used for your admin account.</td>
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Ex Libris, a ProQuest Company
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<p>| Scitation - AIP (American Institute of Physics) | BR2, JR5, JR1GOA, JR1, JR1a, PR1, BR3 | <a href="https://library.scitation.org/api/soap/analytics/SushiService">https://library.scitation.org/api/soap/analytics/SushiService</a> | Connection requires Requester ID and Customer ID |
| SEG (Society of Exploration Geophysicists) | BR2, JR5, JR1GOA, JR1, JR1a, PR1, BR3 | <a href="https://library.seg.org/api/soap/analytics/SushiService">https://library.seg.org/api/soap/analytics/SushiService</a> | |
| SFAA (Society for Applied Anthropology) | JR5, JR1GOA, JR1, PR1, BR3 | <a href="http://sfaajournals.net/api/soap/analytics/SushiService">http://sfaajournals.net/api/soap/analytics/SushiService</a> | |
| SIAM (Society for Industrial and Applied Mathematics) | BR2, JR5, JR1GOA, JR1, JR1a, JR2, PR1, BR3 | <a href="http://epubs.siam.org/api/soap/analytics/SushiService">http://epubs.siam.org/api/soap/analytics/SushiService</a> | Connection requires Requester ID and Customer ID |
| Silverchair | BR2, JR5, JR1GOA, JR1, MR1, JR1a, PR1, JR2, BR3 | <a href="http://sushi.silverchair.com/SUSHIservice.svc">http://sushi.silverchair.com/SUSHIservice.svc</a> | Enter the admin password in the Requester Email field instead of the requester's email. |
| Silvershair (wsdl) | BR2, JR5, JR1GOA, JR1, MR1, JR1a, PR1, JR2, BR3 | <a href="https://sushi.silverchair.com/SUSHIservice.svc?wsdl">https://sushi.silverchair.com/SUSHIservice.svc?wsdl</a> | Enter the admin password in the Requester Email field instead of the requester's email. |
| SpringerLink (Springer Link) Journals | BR2, JR5, JR1GOA, JR1, JR2, BR3 | <a href="http://services.springer.com/sushi">http://services.springer.com/sushi</a> | Connection requires Requester ID and Customer ID |
| Taylor &amp; Francis Ebooks (Taylor and Francis Ebooks) | BR1, BR2, BR3, DB1 | <a href="https://api.taylorandfrancis.com/sushiservice/soap">https://api.taylorandfrancis.com/sushiservice/soap</a> | Connection requires Requester ID and Customer ID |
| Taylor &amp; Francis | JR5, | <a href="http://www.tandfonline.com/api/soap/analytics">http://www.tandfonline.com/api/soap/analytics</a> | Connection requires Requester ID and Customer ID |</p>
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</tbody>
</table>
Managing Funds and Ledgers

To manage funds, you must have the following role:

- Fund Manager
- Fund-Ledger Viewer (view only)

To manage ledgers, you must have the following role:

- Ledger Manager
- Fund-Ledger Viewer (view only)

Your role's scope may limit you to funds or ledgers available only to particular libraries.

A fund represents money in an account. A ledger is essentially a collection of funds. Ledgers are defined for a specific date range, such as September 1 of this year to August 31 of next year. You manage funds and ledgers from the Funds and Ledgers page (Acquisitions > Acquisitions Infrastructure > Funds and Ledgers).

Funds and Ledgers Page

The items in this page appear in a record list; for information about configuring the list, see Record Lists. Records are sorted in ASCII order (alphabetically by upper case letters and then alphabetically by lower case letters.). The fields for each item (fund or ledger) on this page are as follows. See Fund Transaction Terminology for more information about fund and balance types.

- **Name** - The fund or ledger name
- **Code** - The fund or ledger code
- **Type** - Ledger, Allocated fund, or Summary fund
- **Status** - Active (operational), Draft (not yet active), and Inactive (no longer active)
- **Fiscal Period** - The financial year to which the ledger applies. See Configuring Fund and Ledger Fiscal Periods.
- **Path** - The ledger / summary funds to which this fund belongs. Select an item in the path to view the ledger / summary fund. This field is empty for ledgers.
- **Available Balance** - See Fund Transaction Terminology
- **Cash Balance** - See Fund Transaction Terminology
Encumbered Balance - See Fund Transaction Terminology

Expenditure Balance - See Fund Transaction Terminology

Allocated Balance - See Fund Transaction Terminology

Row actions:
- **Edit** - See Editing a Ledger and Editing a Fund.
- **Duplicate** - Add a ledger or fund by duplicating it; see Adding a Ledger and Adding a Fund.
- **Deactivate / Activate** - See Activating and Deactivating Funds and Ledgers.
- **Delete** - See Deleting Funds and Ledgers.
- **Move Fund** (fund only) - See Moving Funds.

To transfer allocations between funds, see Managing Fund Allocation Transfer.

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**Fund Transaction Terminology**

A fund can be allocated or summary.
- A **summary** fund is not used for ordering and invoicing, but provides aggregate reporting on subordinate funds. You can add other funds to this type of fund.
- An **allocated** fund contains money that has been paid out or has been reserved for an open purchase.

A **transaction** can be an allocation, encumbrance, disencumbrance, or expenditure:
- An **allocation** adds money to the fund, increasing its available balance.
- An **encumbrance** indicates money that is expected to be paid out, as the result of a PO line. This decreases its available balance. The encumbrance is closed if there is an equal disencumbrance linked to the same PO line.
- An **expenditure** subtracts money from the fund, decreasing its available balance. Adding an expenditure linked to a PO line increases the value of the disencumbrance linked to that PO line.
- A **disencumbrance** is added or increased when adding an expenditure linked to the same PO line as an encumbrance. There is never more than one disencumbrance for any encumbrance. For example:
  - If a fund has a $100 encumbrance for a PO line. An invoice for $50 linked to that PO line is received. The encumbrance remains $100, an expenditure of $50 is added, and a disencumbrance of $50 is added.
  - After receiving another $50 invoice for the PO line, there are now two expenditures (each for $50), an encumbrance of $100, and a disencumbrance of $100. The encumbrance is now considered fully paid and is closed.

A fund's **available balance** is its allocated balance, less (encumbrances minus disencumbrances) and less expenditures.

A fund's **cash balance** is its allocated balance less expenditures.

A fund's **allocated balance** is its total allocation, not counting any expenditures or encumbrances/disencumbrances.

A fund's **encumbered balance** is the sum of its encumbrances minus disencumbrances.

A fund's **expenditure balance** is its the sum of its expenditures.

---

**Ledger and Fund Ownership and Availability**

A ledger is owned by either the institution or a library. Any funds added to the ledger are owned by the same entity that
owns the ledger. If a fund is owned by a library, it is available only to that library. If a fund is owned by an institution, it can be made available to all libraries at the institution, a group of libraries at the institution, or a single library at the institution.

When creating the ledger, you can set the ownership of the ledger to a library (the institution is selected by default). A user with a role with an institution scope can later change the ownership of a ledger from the library to the institution, but not the reverse (the user cannot change the ledger from being owned by the institution to now being owned by a library). Changing the ownership of the ledger changes the availability scope of the ledger and the ownership of all of its funds, but does not change the availability scope of the funds.

When creating the ledger or fund, you can restrict the availability of the ledger or fund to one or more libraries within the institution. To view or manage a ledger or fund available to a particular library, a user must have the relevant role with a scope of institution or that library.

A user with a role with an institution scope can change the availability of a ledger or fund to include more or less libraries. When you remove the availability of a ledger from one or more libraries, the associated funds are also made unavailable to these libraries. When you add availability to a ledger for one or more libraries, the funds remain unavailable to the libraries unless you add them as well.

When transferring funds between ledgers, you can only move the fund to a ledger with the exact same availability as the one from which you are moving the fund.

## Exchange Rate Handling in Funds

When a PO line creates an encumbrance in a currency that is different that the fund's currency, the available balance is calculated based on the exchange rate between the two currencies. The exchange rates and calculated values of open encumbrances in a foreign currency are recalculated weekly by the Recalculate PO Line Encumbrances Based on Current Exchange Rate job (see Viewing Scheduled Jobs). The exchange rate and exchange rate date of a disencumbrance are always the same as its related encumbrance.

In the following example, a purchase is made in USD on Thursday, and the invoices are received on Sunday and Tuesday. The fund is in EUR and its available balance was 1,000 (one thousand) EUR before the purchase. The available balance is always its total allocation less (calculated encumbrances minus calculated disencumbrances) and less expenditures.

<table>
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<tr>
<th>Date</th>
<th>Events</th>
<th>Exchange Rate EUR/USD</th>
<th>Encumbrance</th>
<th>Expenditures</th>
<th>Disencumbrance</th>
<th>Available Balance</th>
</tr>
</thead>
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<tr>
<td>Thursday</td>
<td>A USD 100 PO Line is sent, to be paid from a EUR fund</td>
<td>0.91</td>
<td>Value: 100 USD Calculated: EUR 91 Exchange Rate Date: Thursday Status: Open</td>
<td></td>
<td></td>
<td>909 EUR: 1000 - 91 encumbrance</td>
</tr>
<tr>
<td>Friday</td>
<td></td>
<td>0.92</td>
<td>Value: 100 USD Calculated: EUR 91 Exchange Rate Date: Thursday</td>
<td></td>
<td></td>
<td>909 EUR: 1000 - 91 encumbrance</td>
</tr>
<tr>
<td>Date</td>
<td>Events</td>
<td>Exchange Rate EUR/USD</td>
<td>Encumbrance</td>
<td>Expenditures</td>
<td>Disencumbrance</td>
<td>Available Balance</td>
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<td></td>
<td>Status: Open</td>
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<tr>
<td>Saturday</td>
<td>The recalculation job runs</td>
<td>0.93</td>
<td>Value: 100 USD</td>
<td></td>
<td></td>
<td>907 EUR:</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Calculated: EUR 93</td>
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<td></td>
<td>1000</td>
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<td></td>
<td></td>
<td></td>
<td>Exchange Rate Date: Saturday</td>
<td></td>
<td></td>
<td>- 93 encumbrance</td>
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<td></td>
<td></td>
<td></td>
<td>Status: Open</td>
<td></td>
<td></td>
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<tr>
<td>Sunday</td>
<td>An invoice for $50 associated with this PO line arrives</td>
<td>0.94</td>
<td>Value: 100 USD</td>
<td></td>
<td></td>
<td>906.50 EUR:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Calculated: EUR 93</td>
<td></td>
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<td>1000</td>
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<td></td>
<td></td>
<td></td>
<td>Exchange Rate Date: Saturday</td>
<td></td>
<td></td>
<td>- (93 encumbrance - 46.50 disencumbrance)</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Status: Open</td>
<td></td>
<td></td>
<td>- 47 expenditure</td>
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<tr>
<td>Monday</td>
<td></td>
<td>0.92</td>
<td>Value: 100 USD</td>
<td></td>
<td></td>
<td>906.50 EUR:</td>
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<td></td>
<td></td>
<td>Calculated: EUR 93</td>
<td></td>
<td></td>
<td>1000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Exchange Rate Date: Saturday</td>
<td></td>
<td></td>
<td>- (93 encumbrance - 46.50 disencumbrance)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Status: Open</td>
<td></td>
<td></td>
<td>- 47 expenditure</td>
</tr>
<tr>
<td>Tuesday</td>
<td>An invoice for $50 associated with this PO line arrives The PO line is</td>
<td>0.90</td>
<td>Value: 100 USD</td>
<td></td>
<td></td>
<td>908 EUR:</td>
</tr>
<tr>
<td></td>
<td>fully paid and the encumbrance is closed.</td>
<td></td>
<td>Calculated: EUR 93</td>
<td></td>
<td></td>
<td>1000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Exchange Rate Date: Saturday</td>
<td></td>
<td></td>
<td>- (93 encumbrance - 93 disencumbrance)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Status: Closed</td>
<td></td>
<td></td>
<td>- 47 expenditure</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- 45 expenditure</td>
</tr>
</tbody>
</table>

### Adding a Ledger

You add a ledger and then add funds to this ledger from the Funds and Ledgers page.

Watch the [Creating a Ledger](#) video (4:00 mins).
To add a ledger:

1. On the Funds and Ledgers page (Acquisitions > Acquisitions Infrastructure > Funds and Ledgers), select **Add Ledger**. The Summary Details page appears.

   ![Add Ledger - Summary Details](image)

   **Note**

   To create a copy of a ledger, select **Duplicate** in the row actions list for the ledger on the Funds and Ledgers page. After copying the ledger, modify it as required.

2. In the **Summary** tab, enter the name and code for the ledger (mandatory).

   **Note**

   The code is reused when you roll over the ledger to a new fiscal period, so don’t use a year-based code, such as **MAIN LEDGER 2015**. The name of the ledger can be changed when it is rolled over to a new fiscal year.

   The field’s limit is 255 characters.

3. Configure the optional fields for the ledger in the **General** section.
### General Ledger Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>External ID</td>
<td>The ID that is used to link to other system keys.</td>
</tr>
<tr>
<td>Owned by</td>
<td>The owning institution or library. When changing this at a later time, you can change the ownership from a library to the institution, but you can not change the ownership from a library to another library or from the institution to a library.</td>
</tr>
<tr>
<td>Available for</td>
<td>The applicable libraries. Clear the institution’s Include sub-unit check box and select one or more libraries from the list to restrict ledger transactions to the selected libraries, preventing the use of the funds in the ledger by other libraries. To select all libraries in the institution, select the institution’s Include sub-unit check box (first row).</td>
</tr>
<tr>
<td>Description</td>
<td>The ledger’s description.</td>
</tr>
</tbody>
</table>
| Status                 | The ledger’s status:  
  ◦ Active – Operational in the system  
  ◦ Draft – Configured in the system but not yet operational  
  ◦ Inactive – Not operational in the system (after previously being active)                                                                                             |
| Currency               | The default unit of currency for the ledger. To configure currencies, see Configuring Currencies.                                                                                                             |
| Fiscal period          | The financial year to which the ledger applies. Only Active fiscal periods appear in the list. To configure these options, see Configuring Fund and Ledger Fiscal Periods. For information, see Configuring Fund and Ledger Fiscal Periods. |
| Fiscal period dates    | The financial dates to which the ledger applies. For information, see Configuring Fund and Ledger Fiscal Periods.                                                                                             |

4. In the Reports section, select the type of report you want to display from the Display report field:  
  ◦ Fund Balance – Displays the previously labeled Balance report  
  ◦ Fund Burn Down – Displays the Fund Burn Down report configured in Alma Analytics

5. In the Rules section, configure the fields associated with the policy behavior of encumbrances and expenditures for this ledger.

### Ledger Rules

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Overencumbrance allowed    | Whether the fund allows you to add an encumbrance whose amount exceeds the fund's available balance (the allocated balance less any expenditures and encumbrances). The valid values are:  
  ◦ No  
  ◦ Yes – Alma checks the specified limit in the fund and performs a calculation against the fund’s amount. (If no limit is specified, the limit is assumed to be 0, which means that Yes will function like No.)  
  ◦ No Limits – indicates that overencumbrances are allowed without limits. Alma does not check the specified limit or whether the fund has money. |
| Overexpenditure allowed    | Whether the fund allows you to add an expenditure whose amount exceeds the fund's available balance. The valid values are:  
  ◦ No  
  ◦ Yes – Alma checks the specified limit in the fund and performs a calculation against the fund’s amount. (If no limit is specified, the limit is assumed to be 0, which means that Yes will function like No.)  
  ◦ No Limits – indicates that overexpenditures are allowed without limits. Alma does not check the specified limit or whether the fund has money. |
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overencumbrance warning percent</td>
<td>The percentage of allowed overencumbrances permitted before the system provides a warning. When that amount is reached, an alert is displayed that the overencumbrance warning threshold has been reached. If the user confirms that the transaction should be added, an alert is added for the entity that created the fund transaction.</td>
</tr>
<tr>
<td>Overencumbrance limit percent</td>
<td>The maximum percentage of allowed encumbrances permitted before the system blocks the creation of an encumbrance. When that amount is reached, the transaction creation is blocked.</td>
</tr>
<tr>
<td>Overexpenditure warning sum</td>
<td>The amount of overexpenditure before the system provides a warning.</td>
</tr>
<tr>
<td>Overexpenditure limit sum</td>
<td>The amount of overexpenditure (checked against the allocated balance) before the system blocks the creation of an overexpenditure.</td>
</tr>
<tr>
<td>Encumbrances prior to fiscal period (days)</td>
<td>The number of days, prior to the fiscal period start date, that new encumbrances can be created. If negative, you cannot create encumbrances during the specified number of days after the fiscal period start date. When working with accrual accounting, it is recommended to set this to 365 (or as early as required to enter the accrual invoices). See Working with Accrual Accounting.</td>
</tr>
<tr>
<td>Expenditures prior to fiscal period (days)</td>
<td>The number of days, prior to the fiscal period start date, that new expenditures can be created. If negative, you cannot create expenditures during the specified number of days after the fiscal period start date. When working with accrual accounting, it is recommended to set this to 365 (or as early as required to enter the accrual invoices). See Working with Accrual Accounting.</td>
</tr>
<tr>
<td>Transfers prior to fiscal period (days)</td>
<td>The number of days, prior to the fiscal period start date, that new money transfers can be created. If negative, money transfers are blocked during the specified number of days after the fiscal period start date. When working with accrual accounting, it is recommended to set this to 365 (or as early as required to enter the accrual invoices). See Working with Accrual Accounting.</td>
</tr>
<tr>
<td>Fiscal period end encumbrance grace period</td>
<td>The number of days, after the fiscal period end date, that new encumbrances can be created. If negative, the system blocks new encumbrances during the specified number of days prior to the end of the period.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>(days)</td>
<td>fiscal period.</td>
</tr>
<tr>
<td>Fiscal period end expenditure grace period (days)</td>
<td>The number of days, after the fiscal period end date, that new expenditures can be created. If negative, the system blocks new expenditures during the specified number of days prior to the end of the fiscal period.</td>
</tr>
</tbody>
</table>

6. In the **Funds** tab, select **Add Fund** to add a fund to the ledger. For information, see [Adding a Fund](#). This option is available only if you selected **Edit** to edit an existing ledger.

7. Select **Save** to store the ledger information that you entered and return to the Funds and Ledgers page.

---

**Note**

Exchange rate updates can cause Alma to recalculate encumbrances and expenditures.

---

### Editing a Ledger

You can update the information entered for a ledger.

**To edit ledger information:**

1. On the Funds and Ledgers page (**Acquisitions > Acquisitions Infrastructure > Funds and Ledgers**), select **Edit** in the row actions list for the ledger whose information you want to update. The Summary Details Page appears. See [Adding a Ledger](#).

2. On the Summary Details page, edit the ledger information as required (note that the **Code**, **Currency**, and **Fiscal Period** fields are not editable). For information on this page, see [Adding a Ledger](#).

---

**Note**

Changing the ownership of the ledger changes the availability scope of the ledger and the ownership of all of its funds, but does not change the availability scope of the funds. When you remove the availability of a ledger from one or more libraries, the associated funds are also made unavailable to these libraries. When you add availability to a ledger for one or more libraries, the funds remain unavailable to the libraries unless you add them as well.

---

3. In the **Funds** tab, add, edit, duplicate, deactivate, or move funds as required. For information on adding funds, see [Adding a Fund](#).

4. In the **Notes** tab, add, update, or delete notes for the ledger. See [Notes Tab](#).

5. In the **Attachments** tab, add, update, or delete attachments for the ledger. See [Attachments Tab](#).

6. To store your changes and deactivate the ledger, select **Deactivate**. To activate the ledger select **Activate**. Otherwise, to store your changes, select **Save**.
Adding a Fund

You can add a fund to a ledger or to a summary fund. You can add encumbrances to the fiscal period of a fund or ledger only if:

- The fiscal period is **Active**
- The date range of the fiscal period includes the current date

Alternatively, you can add encumbrances to a fund’s fiscal period prior to or after the actual fiscal period, provided the relevant fields are configured in the **Rules** section of the Summary Details page (select **Add Ledger**). For details on the fields in the **Rules** section, see **Adding a Ledger**.

Watch the **Creating a Fund** video (5:00 mins).

**To add a fund to a ledger or summary fund:**

1. On the Funds and Ledgers page (**Acquisitions > Acquisitions Infrastructure > Funds and Ledgers**), select **Edit** in the row actions list for the ledger or summary fund to which you want to add a fund.

2. Select the **Funds** tab. The **Funds List** page appears.

   ![Funds List Page](image)

3. Select **Add Fund** and select either **Allocated fund** or **Summary fund**. The Summary Details page appears.
4. Enter the fund name and code (mandatory).

**Note**

If you want to create a copy of a fund, select Duplicate in the row actions list for the fund you want to copy. Once you have copied the fund, you can modify it as needed.

5. Optionally, enter an external ID for the fund that can be used to link to other system keys, and a description of the fund.

**Note**

Owned by, Path, Currency, Fiscal period, and Fiscal period dates are inherited from the ledger and cannot be modified. Available for is also inherited, but you can remove libraries to make it more restrictive in the next fiscal period.

The code is reused when you roll over the ledger to a new fiscal period, so don’t use a year-based code, such as MAIN FUND 2015. The name of the fund can be changed when it is rolled over to a new fiscal year. If you are working with accrual accounting (see Working With Accrual Accounting), do not change the name of the fund in the new fiscal period.

The field’s limit is 255 characters. It is recommended that the code not contain any special characters.
6. If the fund’s parent ledger / summary fund was available to more than one library, select the libraries to which this fund is available in Available For. You can make the the fund's availability more restrictive than its parent.

7. Optionally enter a fund type. To configure fund types, see Configuring Fund Types.

---

**Note**

To make this fund available to attach to resource sharing requests, the fund type must be Resource Sharing. See Borrowing Requests Associated with Funds.

---

8. To override the rules set by the ledger, in the Rules area select Override Rules Information and then configure the fields associated with the policy behavior of encumbrances and expenditures for this fund. For an explanation of these fields, see Adding a Ledger.

9. For a summary fund:
   1. In the Reports section, select the type of report you want to display from the Display report field, as follows:
      - Fund Balance – Displays the previously labeled Balance report.
      - Fund Burn Down – Displays the Fund Burn Down report configured in Alma Analytics.
   2. In the Funds tab, select Add Fund to add a fund to the ledger (starting with step 1 of this process).

10. Select Save to store the fund information.

---

**Note**

After you have completely configured this fund, select Activate to activate the fund. Once the fund is saved, the Fund Code cannot be modified.

---

**Editing a Fund**

You can update the information entered for a fund.

**To edit fund information:**

1. On the Funds and Ledgers page (Acquisitions > Acquisitions Infrastructure > Funds and Ledgers), select Edit in the row actions list for the fund whose information you want to update.

2. On the Summary Details page, edit the fund information, as required. For more information on this page, see Adding a Fund. Note that the fund’s code is not editable.

3. For allocated funds, select the Transactions tab to perform transactions on the fund. For more information on transferring and allocating funds, see Performing Fund Transactions.

4. In the Notes tab, add, update, or delete notes for the fund. See Notes Tab.

5. In the Attachments tab, add, update, or delete attachments for the fund. See Attachments Tab.

6. To store your changes and deactivate the fund, select Deactivate. To activate the fund, select Activate. Otherwise,
to store your changes, select Save.

Activating and Deactivating Funds and Ledgers

Before a fund can be used, it must be activated.

After you have allocated all necessary funds for a ledger, you must activate the ledger to use it.

You can deactivate a fund or ledger that you currently do not need but may need at a later time. You also must deactivate a fund or ledger before it can be deleted (see Deleting Funds and Ledgers).

To activate or deactivate funds and ledgers:

On the Funds and Ledgers page (Acquisitions > Acquisitions Infrastructure > Funds and Ledgers), select Activate or Deactivate in the row actions list for the ledger or fund that you want to activate or deactivate.

Note

- You can also activate a fund while adding or editing it by selecting the Activate link on the Funds List page, or by selecting Activate in any of the fund's tabs, after you have configured the fund. You can also activate a ledger while editing it by selecting Activate in any of the ledger's tabs.
- You can also deactivate a fund by selecting the Deactivate link on the Funds List page, or by selecting Deactivate in any of the fund's tabs. You can also deactivate a ledger while editing it by selecting Deactivate in any of the ledger's tabs.
- When deactivating a ledger or summary fund, you are prompted to deactivate the funds associated with the ledger or summary fund. All funds associated with a ledger or summary fund must be deactivated before the ledger or summary fund can be deactivated.

Deleting Funds and Ledgers

When a ledger or fund is no longer needed for a fiscal period, it can be deleted from the system. Note that the fund/ledger must be Inactive or Draft to be deleted.

To delete a ledger or fund:

On the Funds and Ledgers page (Acquisitions > Acquisitions Infrastructure > Funds and Ledgers), select Delete in the row actions list for a fund or ledger. If the fund (or funds associated with the ledger) has no associated transactions, encumbrances, or expenditures, it is deleted. If a ledger is deleted, all the funds associated with the ledger are also deleted.

Note

Alternatively, you can delete a fund/ledger while editing it by selecting Delete in any of the fund's/ledger's tabs.

Performing Fund Transactions

Fund transactions are performed in the Transactions tab, accessible by selecting Edit in the row actions list for an
allocated fund on the Funds and Ledgers page (Acquisitions > Acquisitions Infrastructure > Funds and Ledgers). The Transactions tab lists all of the transactions performed on an allocated fund.

Transactions Tab

In this tab, you can:

- View details for a transaction
- Allocate money to an allocated fund
- Transfer money from one allocated fund to another. You can also transfer funds

**Note**

To reduce a fund’s allocation, you allocate money using a negative number.

To view details for a transaction:

In the Transactions tab, select View in the row actions list for a transaction. The Transaction Details page appears with details for the specified transaction.
To allocate money to an allocated fund:

1. In the **Transactions** tab, select **Allocate Funds**.

2. Enter the allocation amount and fill in the following optional fields:
   - **Transaction reference number** – A number that may be used to reference a particular allocation to the fund
   - **Transaction note** – A description of the transaction

3. Select **Add Allocation Transaction** and select **Confirm** in the confirmation dialog box.

4. Select **Save**.

To perform a transfer from one allocated fund to another:

1. In the **Transactions** tab, select **Transfer Funds**.

   **Note**
   
   The **From fund** field contains the value of the current fund, which cannot be changed.

2. Continue as described in [Transferring Money Between Allocated Funds](#), starting from step 2.
Transferring Money Between Allocated Funds

To manage fund allocation transfer, you must have the following role:

- Fund Manager

You can transfer (move) money from one allocated fund to another. This adds a negative allocation to the source fund and a positive allocation to the target fund.

You can transfer money only between funds in the current fiscal period. Depending on the configuration of the Transfers prior to fiscal period parameter within your ledger, you may be able to transfer money a few days before the fiscal period begins, or may be prevented from transferring money for a few days after the fiscal period starts; see Adding a Ledger.

Note

To create copies of allocated funds and allocations in a new ledger when rolling over the fiscal year, see Fiscal Period Closure. This procedure is an entirely different feature from transferring allocations between funds in the same fiscal period.

Watch the Transferring Funds video (3:00 mins).

You transfer funds on the Funds Transfer page (Acquisitions > Acquisitions Infrastructure > Transfer Funds) or on a fund’s Transaction tab (see Performing Fund Transactions).

To transfer money from any allocated fund to another fund:

1. On the Funds Transfer page, select the fund from which you want to transfer money in From fund.
2. In To fund, select the fund to which you want to transfer money.
3. In Amount, enter the amount you want to transfer.
4. Enter any notes you want to include with the transfer in Transaction note.
5. Select Add Transfer Transaction and select Confirm in the confirmation dialog box.

The details of the transaction appear on the page, as well as in the Transactions tabs of the relevant funds.
Moving Funds

To move funds, you must have the following role:

- Fund Manager

You move funds on the Funds Transfer Page (Acquisitions > Acquisitions Infrastructure > Move Funds in Hierarchy).

To move funds:

1. On the Funds Transfer page, in the **Fund to relocate** field, select a source fund.

   Alternatively, on the Funds and Ledgers page, select **Move fund** beneath the specific fund that you want to relocate. In this case, the **Fund to relocate** field is pre-populated.

2. In the **Target ledger/summary fund** field, select a target fund.

3. Select **Add Fund Relocation** and select **Confirm** in the confirmation dialog box. The relocated fund with its new location and old location appears at the bottom of the Funds Transfer page.
Managing Licenses and Amendments

To view licenses and license amendments, you must have one of the following roles:

- License Manager
- License Viewer
- Selector
- Purchasing Operator
- Purchasing Manager

To manage licenses, license amendments, and create license templates you must have the following role:

- License Manager

Many electronic resources require licenses from the vendors that provide the resources. Alma enables you to enter license information for tracking and informational purposes.

You can enter license information and amendments. You associate a license with an activated electronic resource in your local inventory on the Repository Search page (see Searching in Alma) or on the PO Line Summary page of the purchasing workflow (see Manually Creating a PO line).

**Note**

- Alma's functionality does not change based on license information; the exception to this is ordering Network Zone managed electronic resources in a collaborative network; see Adding a Negotiation License or a Centrally Negotiated License. Alma does not restrict access to resources if a license is not present or if it expires.
- Alma supports DLF-ERMI and ONIX-PL for managing licenses. For details about setting up ONIX-PL licenses, see Adding ONIX-PL-Formatted Licenses.

You manage licenses on the Licenses and Amendments page (Acquisitions > Acquisitions Infrastructure > Licenses).
Adding a License

Note

If you are using licenses in a collaborative network implementing a Network Zone, see Adding a Negotiation License or a Centrally Negotiated License.

To add a license:

1. On the Licenses and Amendments page (Acquisitions > Acquisitions Infrastructure > Licenses), select Add License.
2. Select Manually.

For information about adding a license from an ONIX-PL file, see Adding ONIX-PL-Formatted Licenses. For information about adding a license from a template, see Loading a License from a Template.

3. The Summary tab on the License Details page appears.

4. Enter the name of the license and license code, and select the start date of the license. These fields are mandatory.

5. Configure the following optional fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>License Status</td>
<td>The status of the license. The values are:</td>
</tr>
<tr>
<td></td>
<td>◦ Active – The license is activated and in use</td>
</tr>
<tr>
<td></td>
<td>◦ Deleted – Mark the license is deleted. Deleted licenses can be re-activated by selecting Edit in the row actions list and changing the license status value. Relevant only when updating an existing license.</td>
</tr>
<tr>
<td></td>
<td>◦ Draft – The license is created but not in use</td>
</tr>
<tr>
<td></td>
<td>◦ Expired</td>
</tr>
<tr>
<td></td>
<td>◦ Retired</td>
</tr>
<tr>
<td>Licensor</td>
<td>A vendor to associate with the license.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>A license may be linked to a single vendor.</td>
<td></td>
</tr>
<tr>
<td>Signed by</td>
<td>The user who approved of the license.</td>
</tr>
<tr>
<td>Signed on</td>
<td>The date on which the license was approved by the above user.</td>
</tr>
<tr>
<td>Second party’s signed by</td>
<td>The user who is a secondary approver of the license.</td>
</tr>
<tr>
<td>Second party’s signed on</td>
<td>The date on which the license was approved by the secondary approver.</td>
</tr>
<tr>
<td>Start date</td>
<td>The start date.</td>
</tr>
<tr>
<td>End date</td>
<td>The end date.</td>
</tr>
<tr>
<td>License location</td>
<td>The physical location of a printed license. The values are configured in the License Storage Location code table (see Configuring License Storage Locations).</td>
</tr>
<tr>
<td>License review status</td>
<td>The status of the license review. Possible values are:</td>
</tr>
<tr>
<td>accepted</td>
<td>Accepted – The license has passed review and is available for use.</td>
</tr>
<tr>
<td>in review</td>
<td>In review – The license is being reviewed by the library/institution.</td>
</tr>
<tr>
<td>pending</td>
<td>Pending – A license for which review has not yet begun.</td>
</tr>
<tr>
<td>rejected</td>
<td>Rejected – A license which has been determined to be unacceptable. The license is not available for use, but a record of it is kept in the system.</td>
</tr>
<tr>
<td>Note</td>
<td>You can also configure additional license review statuses, as necessary. For more information, see Configuring License Review Statuses.</td>
</tr>
<tr>
<td>These values are for informational purposes, only.</td>
<td></td>
</tr>
<tr>
<td>License URI</td>
<td>The URI where an electronic license is available.</td>
</tr>
<tr>
<td>Licensing agent</td>
<td>A an additional vendor, that is the organization (such as a subscription agent) or individual that facilitates a licensing transaction on behalf of one or more parties.</td>
</tr>
<tr>
<td>Possible functions of the agent include acting as a negotiating intermediary (with or without a fee for services), a vendor accepting payment for the product, or the named licensee for a particular agreement.</td>
<td></td>
</tr>
</tbody>
</table>

6. In the License Terms tab, configure the terms of the license, such as its terms of use, restrictions, and perpetual rights. For information on these terms, see List of License Term Types.

The sections and fields in this tab represent a subset of the full set. An Acquisitions Administrator can configure which fields appear an in which order; for more information, see Configuring Sections Order and Managing License Terms.
7. Skip the PO Lines and Administrators tabs for now (see Editing Licenses or Amendments). Select Save to store the information you entered and return to the Licenses and Amendments page.

Adding an Amendment to a License

You can create amendments to existing licenses, which modify the properties of the base license. Amendments added to a license override the base license.
To amend a license:

1. On the Licenses and Amendments page (Acquisitions > Acquisitions Infrastructure > Licenses), select Create Amendment in the row actions list for the license you want to amend. The Summary tab on the License Details page appears.

2. Enter a name and a unique license code for the amended license.

3. Edit the remaining fields in this tab as required. For more information on these fields, see Adding a License.

4. In the License Terms tab, modify the fields of the amended license, as required.

5. In the Inventory tab, you can view the active packages associated with the license and the historical packages that are no longer associated with the license.

Note

If you create an amendment, you must modify the license code, since it is unique to each license/amendment. You cannot add amendments to amendments.
A resource may be removed from the license history by selecting **Remove** from the row actions menu.

---

**Note**

Licenses can be associated with packages either by searching in the repository (see [Searching in Alma](#)) or from the PO Line Summary page of the purchasing workflow (see [Manually Creating a PO line](#)).

---

6. In the **PO Lines** tab, you can view PO lines linked to the license. For information about the actions for each PO line, see [Searching for PO Lines](#).

   For more information about linking closed or canceled PO lines to a license, see the [Link Closed/Canceled PO Lines to Licenses](#) video (1:10 mins).

7. Select **Save** to store the amendment information you entered and return to the Licenses and Amendments page.

---

### Editing Licenses or Amendments

You can edit license or an amendment information. If a license is centrally negotiated in a Network Zone, do not edit the license outside of the Network Zone; to make changes, add an amendment. See [Distributing Centrally Negotiated Licenses](#).

To edit a license or an amendment:

1. On the Licenses and Amendments page (**Acquisitions > Acquisitions Infrastructure > Licenses**), select **Edit** in the row actions list for a license or amendment. The **Summary** tab on the License Details page appears. See [Adding a License](#).

2. Update the fields as required. For more information on these fields, see [Adding a License](#).

3. In the **License Terms** tab, update the fields used to define the terms of the license or amendment, as required. For more information on these fields, see [Adding a License](#).

4. In the **Inventory** tab, you can view the active packages associated with the license/amendment and the historical packages that are no longer associated with the license/amendment.

5. In the **PO Lines** tab, view PO lines linked to the license. For information about the actions for each PO line, see [Searching for PO Lines](#).

6. If you are editing a license, you can perform the following actions on amendments in the **Amendments** tab:
   - Add an amendment – Select **Add Amendment** to open the License Details page and add a new amendment (see [Adding an Amendment to a License](#)).
   - Edit the amendment – Select **Edit** in the row actions list.
   - View the license information – Select **Base** in the row actions list (or just select the **Summary** tab of the license).
   - Duplicate the amendment – Select **Duplicate** in the row actions list.
   - Delete the amendment – Select **Delete** in the row actions list.

7. You can set the license that is available for a group. In the **Group Settings** tab, select **Add Settings for Group** to add a group. To remove a group, select **Remove** from the group’s row action menu. This tab is only visible when the license type is **License** or **Negotiation**. This functionality is similar to the **Inherited Group Settings** for electronic resources.

8. In the **Administrators** tab, select **Add administrator** and select the administrator to add to the license or amendment. This is for informational purposes only.
9. In the **History** tab, view changes to licenses. For more information, see [History Tab](#).

![License History](image)

**License History**

- Select **License changes** to display changes to the license.
- Select **License terms changes** to display changes to the terms of the license.
- In a collaborative network implementing a Network Zone, select **Negotiation changes** to display changes to the license negotiations.

**Note**

When a license is first created, there is no history data.

10. In the **Notes** tab, add, update, or delete notes for the license or amendment. For details, see [Notes Tab](#).

11. In the **Attachments** tab, add, update, or delete attachments for the license or amendment. For details, see [Attachments Tab](#).

12. Select **Save** to store the changes you made to the license or amendment.

For more information about license related enhancements, see the [New License History Tab and Other License-Related Enhancements](#) video (3:41 mins).

### Printing Licenses or Amendments

You can print a license or amendment. The letter used to print the license is the License Printout Letter (letter code: LicensePrintoutLetter); see [Configuring Alma Letters](#). Printing an amendment only includes the Terms of Use of the Amendment, not its parent license. Printing a negotiation license includes the negotiation details.

To print a license or amendment:

1. On the Licenses and Amendments page (**Acquisitions > Acquisitions Infrastructure > Licenses**), select the **Print license** button at the top of the page or select **Print license** in the row actions list for a license or amendment. The Print License page appears.

    ![Print License](image)

    **Print License Page**

2. Either enter an email address or select a printer to which to deliver the printout. At least one of these fields is
mandatory.
3. Select **Submit**. The license is sent to the entered email or selected printer. The printout is also added as an attachment on the **Attachments** tab of the license.

---

**Deleting Licenses or Amendments**

You don't actually remove a license. Instead, you can change the status of a license or an amendment to **Deleted**. A deleted license can still be associated with a PO line.

To **note a license or an amendment as deleted**:  
On the Licenses and Amendments page (**Acquisitions > Acquisitions Infrastructure > Licenses**), select **Delete** in the row actions list for a license or amendment and select **Confirm** in the confirmation message dialog box.

---

**Adding ONIX-PL-Formatted Licenses**

You can integrate ONline Information eXchange for Publication Licenses (ONIX-PL) with license standards that conform to Digital Library Federation (DLF) standards. Alma maps fields from the ONIX-PL XML file to fields in the DLF-based license template, as described in the following tables.

---

**ONIX Fields Mapping to Alma**

If any of the following terms exists in the ONIX file, Alma maps the field with the value **Yes**.

<table>
<thead>
<tr>
<th>ONIX Field</th>
<th>Alma Field</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Terms Section:</strong></td>
<td></td>
</tr>
<tr>
<td>AllRightsReserved</td>
<td>All rights reserved</td>
</tr>
<tr>
<td>DatabaseProtectionOverride</td>
<td>Database protection override clause</td>
</tr>
<tr>
<td>StatutoryRightsAffirmation</td>
<td>Fair use clause</td>
</tr>
<tr>
<td>ClickThroughOverride</td>
<td>Clickwrap modification clause indicator</td>
</tr>
<tr>
<td>ConfidentialityOfUserData</td>
<td>Confidentiality of user information indicator</td>
</tr>
<tr>
<td>LicenseeIndemnity</td>
<td>Indemnification by licensee clause</td>
</tr>
<tr>
<td>LicensorIntellectualPropertyWarranty</td>
<td>Intellectual property warranty indicator</td>
</tr>
<tr>
<td>UCITAOVERRIDE</td>
<td>UCITA Override Clause Indicator</td>
</tr>
<tr>
<td><strong>Supply Terms Section:</strong></td>
<td></td>
</tr>
<tr>
<td>ComplianceWithAccessibilityStandards</td>
<td>Accessibility compliance indicator</td>
</tr>
<tr>
<td>CompletenessOfContent</td>
<td>Completeness of Content clause indicator</td>
</tr>
</tbody>
</table>

---

Ex Libris, a ProQuest Company
If any of the following terms exists in the ONIX file, Alma maps the text from the href id field of the ONIX file to the Alma field.

<table>
<thead>
<tr>
<th>ONIX Field</th>
<th>Alma Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>ConcurrencyWithPrintVersion</td>
<td>Concurrency with print version clause indicator</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ONIX Field</th>
<th>Alma Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Terms Section:</td>
<td></td>
</tr>
<tr>
<td>ApplicableCopyrightLaw</td>
<td>Applicable Copyright Law</td>
</tr>
<tr>
<td>GoverningLaw</td>
<td>Governing law</td>
</tr>
<tr>
<td>ActionOnTermination</td>
<td>Termination Requirements</td>
</tr>
<tr>
<td>Supply Terms Section:</td>
<td></td>
</tr>
<tr>
<td>ContentWarranty</td>
<td>Content Warranty</td>
</tr>
<tr>
<td>ServicePerformanceGuarantee</td>
<td>Performance Warranty Uptime Guarantee</td>
</tr>
</tbody>
</table>

If either of the following terms exists in the ONIX file, Alma maps the field with the relevant ENUM (Permitted/ Prohibited/ Silent/ Un-interpreted/ Not Applicable).

<table>
<thead>
<tr>
<th>ONIX Field</th>
<th>Alma Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usage Terms Section:</td>
<td></td>
</tr>
<tr>
<td>SupplyCopy</td>
<td>Scholarly sharing</td>
</tr>
<tr>
<td>PrintCopy</td>
<td>Print copy</td>
</tr>
</tbody>
</table>

Fields that are mapped from ONIX-PL receive the attributes and characteristics (such as Order and whether or not a field appears in the license itself) of the DLF fields, as configured by the Alma Acquisitions Administrator. A field that was mapped from ONIX-PL to Alma may not appear in the license, even though it is in use, depending on the settings of the DLF field to which the ONIX-PL field is mapped.

Fields that exist in the ONIX-PL XML file but not in Alma are stored in the original uploaded XML file from the library.

For more information on loading ONIX-PL Formatted Licenses, see the Load ONIX-PL Formatted Licenses video (7:33 mins).

Creating and Configuring a License from ONIX-PL

You can upload the ONIX-PL XML file and create a license based on its specifications.

To create an Alma license from an ONIX-PL-formatted license:

1. On the Licenses and Amendments page (Acquisitions > Acquisitions Infrastructure > Licenses), select Add
License.

2. Select From ONIX-PL file.

The Create license from file page appears.

![Create license from file](image)

**Required Fields for new License**

3. Enter a name and code for the license.

4. Select the folder in the Upload File field, browse to the ONIX-PL upload file, select it, and select **Upload**.

   Alma uploads the file and displays the **Summary** tab of the License Details.

5. Fill in any remaining information (see Adding a License) and select **Save**.

---

**Managing License Templates**

A license can be saved as a license template or a license negotiation template.

**Creating License Templates**

A license template is created from an existing license. Saving a license as a template saves the license summary, license terms, group settings, and administrators information for use when creating a new license or a new negotiation license. To create a template, edit the license to be used as a template and select the **Save as template** button at the top of a license.

**Loading a License from a Template**

A new option on the Add License menu, **Load from template**, allows creating new licenses based on previously defined templates.

**Editing License Templates**

License templates may be edited and deleted from the **License Template** menu option on the Acquisitions menu.
Advanced Tools

This section includes:

- Exchange Rates Report
- Fiscal Period Closure
- Patron Driven Acquisitions
- Changing Vendors in PO Lines and POs

For information on managing sets, see Managing Search Queries and Sets.
Exchange Rates Report

To view exchange rates, you must have one of the following roles:

- Acquisitions Administrator
- General System Administrator
- Purchasing Manager
- Purchasing Operator

The Exchange Rates Report enables you to view the exchange rates of single or multiple currencies for a single day or over a period of time. Ex Libris partners with Open Exchange Rates for exchange rate currencies. The exchange rates are automatically updated on a daily basis. It is possible to see the exchange rates per day by selecting Acquisitions > Advanced Tools > Exchange rates report. Choose the desired Source Currency and From Date. For the current list of supported currencies, see https://openexchangerates.org/currencies.

To view the Exchange Rates Report:

2. Select Submit to view the exchange rates.

Exchange Rates Report, Default View

Note
The default view is all target currencies for today’s date.

1. To view the exchange rate between a source currency and multiple other currencies, select All for Report Type. To view the exchange rate between a source currency and just one other currency, select Single for Report Type.
2. Select the source currency. If you selected Single, also select the target currency.
3. Select the date on which to view the exchange rates. If you selected Single, select both a start and end date.
4. Select Submit to view the exchange rates.
Fiscal Period Closure

To perform fiscal period closure, you must have the following role:

- Fiscal Period Manager

To close a fiscal period and move to the next fiscal period, you must run the following jobs:

- **Ledger rollover** – Copy the ledgers from the closing fiscal period to the next fiscal period (see [Rolling Over Ledgers](#)).
- **PO line rollover** – Copy PO lines from the closing fiscal period to the next fiscal period (see [Rolling Over PO Lines](#)).
- **Resource sharing requests rollover** – Copy resource sharing transactions from the closing fiscal period to the next fiscal period (see [Rolling Over Resource Sharing Requests](#)).

The following order types are rolled over during fiscal period closure:

- Subscription orders
- Standing orders
- PO lines not fully invoiced or not fully paid by the end of the fiscal period
- Resource sharing requests that have not yet been received

---

**Note**

Some parameters in the ledger can affect whether the ledger can be encumbered or handle expenditures outside of its fiscal period. See [Adding a Ledger](#).

---

Watch the videos in the [Fiscal Period Closure](#) training kit.

---

Rolling Over Ledgers

To perform a ledger rollover, you must have the following role:

- Fiscal Period Manager

This is the first step in the fiscal period closure process.

As part of the fiscal period closure, the Ledger Manager runs a manual job that copies the ledger of the current fiscal period with all the summary details and allocated funds to the new fiscal period, if required. No changes to the ledger or allocations are made during this process. If the next fiscal period does not exist, Alma creates a new one, which you can then edit (see [Configuring Fund and Ledger Fiscal Periods](#)).

---

**Note**

If you want to change either the name or code of the ledger, ensure that you roll over the ledgers in draft.

---

Rolling over ledgers is performed on the Rollover Ledgers page ([Acquisitions > Advanced Tools > Rollover Ledgers](#)).
Rollover Ledgers Page

The Rollover Ledgers page displays the following information for each rollover job:

- Job ID number
- Status
- User that added the job
- Time the job started
- Time the job ended
- Number of ledgers rolled over in the job (Number finished)
- Number of failed rollovers in the job

To perform a ledger rollover:


2. Enter the job information as required. A description of the fields is provided in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create allocation</td>
<td>Select whether you want to copy the allocated funds with their allocations to the new ledger for the new fiscal period. The options are:</td>
</tr>
<tr>
<td></td>
<td>◦ Allocation Balance - The allocated funds are copied with their allocations to the new ledger for the new fiscal period.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>None</td>
<td>No allocations are created for the new fiscal period.</td>
</tr>
<tr>
<td>Cash Balance</td>
<td>The cash balance of the ledger fund populates the allocation balance in the new fiscal period.</td>
</tr>
<tr>
<td>Both</td>
<td>The cash balance of the ledger fund and the allocated balance are both added to the allocation balance for the new fiscal period.</td>
</tr>
</tbody>
</table>

If **Allocation Balance** or **Both** options are selected, the **FPC factor (%)** displays. Enter a value representing the increase/decrease percentage of the new allocated funds when copied from the original ledger. The **FPC factor (%)** is multiplied by the original allocation sum to determine the allocation amount. If **Both** is selected and the FPC factor is populated, the factor will be applied only to the allocation balance of the current fiscal period, not the cash balance.

**Note**
The **Create allocation** field does not appear if you select **Delete** in the **Action** field.

<table>
<thead>
<tr>
<th>Ledger</th>
<th>Select whether you want to copy all the ledgers or a specific ledger from the drop-down list. Only ledgers that exist in the displayed fiscal period appear. Note that if you select <strong>All</strong>, all ledgers in the fiscal period are rolled over, including inactive or draft ledgers. See the <strong>Create Status</strong> field, below.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Select an action:</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Copy</strong> – Copy the ledger(s) to the new fiscal period. If the fiscal period does not exist, a new one is created.</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Delete</strong> – Delete the ledger(s) from the new fiscal period. If the ledger does not exist, the job completes successfully. If the ledger exists, the job checks for any transactions (other than allocations). If a transaction (encumbrance or expenditure) is found, the job completes with the error <strong>Ledger &lt;ledgerid&gt; cannot be deleted – ledger has transactions on it</strong>.</td>
</tr>
<tr>
<td>FPC factor (%)</td>
<td>The increase/decrease percentage of the new allocated funds when they are copied from the source ledger. If no percentage is entered, the value defaults to 0%.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>This field appears only if you select <strong>Yes</strong> in the <strong>Create allocation</strong> field and <strong>Copy</strong> in the <strong>Action</strong> field.</td>
</tr>
<tr>
<td>Create Status</td>
<td>Set the status of the selected ledger(s) in the new fiscal period. Select from:</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Draft</strong> – The new ledgers and all of their funds—including both Summary and Allocated funds—are created with the status <strong>Draft</strong> (which is operatively the same as <strong>Inactive</strong>; see information on <a href="#">ledger statuses</a>).</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Active</strong> – The new ledgers and all of their funds are created with the status <strong>Active</strong>.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>◦ This field does not appear if you select <strong>Delete</strong> in the <strong>Action</strong> field.</td>
</tr>
<tr>
<td></td>
<td>◦ If you selected all ledgers in the <strong>Ledger</strong> field, all rolled over ledgers will be set to the value you select here in the new fiscal period.</td>
</tr>
<tr>
<td></td>
<td>◦ All rolled over funds are changed to the status of the ledger, regardless of the original status of the funds.</td>
</tr>
<tr>
<td>Copy from year</td>
<td>The year from which to copy the ledger. Select from the current or previous fiscal period.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Notes</td>
<td>When selected, all notes are copied to the new fiscal year.</td>
</tr>
<tr>
<td>Copy Attachments</td>
<td>When selected, the contents of the attachment tab are copied to the new fiscal year.</td>
</tr>
</tbody>
</table>

When the new fiscal year is created, the contents of the Description field under the Summary tab is automatically copied.

3. Select Add to roll over the ledgers. Select Add and Close to roll over the ledgers and close the dialog box. Alma runs the rollover job. The job is added to the Rollover Ledgers page and runs immediately.

Select View in the row actions list to view details of the job. See Rollover Ledgers Job Report.

Select Events in the row actions list to view the job events. See Viewing Job Events.

### Rolling Over PO Lines

To perform a PO line rollover, you must have the following role:

- Fiscal Period Manager

This is the second step in the fiscal period closure process.

You must run a job to copy the encumbered PO lines to the new fiscal period. During the rollover process, you can select whether you want to increase or decrease the amount of the encumbered PO line.

**Note**

Before performing a PO line rollover, you must first perform all ledger rollovers. See Rolling Over Ledgers.

Ensure that the ensuing fiscal period exists and that the relevant funds and ledgers are active before performing a PO line rollover.

PO line rollover is performed on all active, continuous PO lines and on active, one-time PO lines that still have an encumbrance. PO lines are updated according to the order currency. The exchange rate is recalculated according to the most recent currency rate of exchange, taken from the Exchange Rate Table.

Rolling over PO lines is performed on the Rollover PO Lines page (Acquisitions > Advanced Tools > Rollover PO Lines).
The Rollover PO Lines page displays the following information for each rollover job:

- Job ID number
- Status
- User that added the job
- Time the job started
- Time the job ended
- Number of PO lines rolled over in the job \((\text{Number finished})\)
- Number of failed rollovers in the job

To perform a PO line rollover:

1. On the Rollover PO Lines page, \((\text{Acquisitions} \ > \ \text{Advanced Tools} \ > \ \text{Rollover PO Lines})\), select \text{Add Job}. The Add Job dialog box appears.

2. Enter the job information as required. A description of the fields is provided in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>The way to calculate the encumbrances in the new fiscal period. When working with continuous PO lines, you can</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>encumbrance calculation</td>
<td>base this calculation on:</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Encumbrance</strong> – Adds all the encumbrances and moves them to the new fiscal period (plus or minus the FPC factor %). Alma then runs the dis-encumbrance on the entire expenditure.</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Expenditure</strong> – Calculation is based on the sum of all expenditures related to the fiscal period (plus or minus the FPC factor). The encumbrance is relative for each fund. If this option is selected and the PO line does not have expenditures, calculation is instead based on encumbrance.</td>
</tr>
<tr>
<td></td>
<td>Calculation for one-time PO lines is always based on <strong>Encumbrance</strong>, but the FPC factor % is not calculated.</td>
</tr>
<tr>
<td>FPC factor (%)</td>
<td>The increase/decrease percentage of the encumbrance when the PO lines are copied to the new fiscal period. If no percentage is entered, the value defaults to 0%. After the rollover job runs, the PO line fund’s local and foreign currency update according to this value.</td>
</tr>
<tr>
<td>From year</td>
<td>The year from which to copy the PO line. Select from the current or previous fiscal period.</td>
</tr>
<tr>
<td>Libraries</td>
<td>A library or libraries for which the PO line rollover is to take effect. If you do not select a value in this field, rollover is performed for the entire institution.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>The <strong>Include sub-unit</strong> check boxes in the dialog box are non-functional.</td>
</tr>
<tr>
<td>PO Line</td>
<td>You can select a single PO line. If you do not, all PO lines are rolled over.</td>
</tr>
<tr>
<td>Check over encumbrance</td>
<td>Whether to ensure that checking over-encumbrance rules of the fund/ledger are performed. Clear this option if you do not want over-encumbrance rules to be checked (such as for institutions whose funds do not have money because the ledger rollover runs without allocation).</td>
</tr>
<tr>
<td>Report mode</td>
<td>It is recommended that you select this to simulate a PO line rollover in test mode before generating a real PO line rollover. This option generates a report identifying any errors that need to be resolved. The rollover is simulated but no changes are made to the repository.</td>
</tr>
<tr>
<td>Continuous Order Only</td>
<td></td>
</tr>
<tr>
<td>Standing Order Only</td>
<td>If none of these options are selected, or if all of them are selected, then encumbrances for all PO lines types are rolled over. Otherwise, only the selected type/types are rolled over.</td>
</tr>
<tr>
<td>One-Time Order Only</td>
<td></td>
</tr>
</tbody>
</table>

3. **Select Add** to roll over the PO lines. **Select Add and Close** to roll over the PO lines and close the dialog box. Alma runs the rollover job. The job is added to the Rollover PO Lines page and runs immediately.

Select **View** in the row actions list to view details of the job. See **Rollover PO Lines Job Report**.

Select **Events** or **Report** in the row actions list to view the list of job events. See **Viewing Job Events**.
Rolling Over Resource Sharing Requests

To perform a ledger rollover, you must have the following role:

- Fiscal Period Manager

This is the third step in the fiscal period closure process.

You must run a job to copy the encumbered resource sharing requests to the new fiscal period. Only resource sharing requests associated with a fund may be encumbered; see Borrowing Requests Associated with Funds.

Note

Before performing a resource sharing request rollover, you must first perform all ledger rollovers. See Rolling Over Ledgers.

Ensure that the ensuing fiscal period exists and that the relevant funds and ledgers are active before performing a resource sharing request rollover.

Resource sharing request rollover is performed on all active resource sharing requests that still have an encumbrance.

Rolling over resource sharing requests is performed on the Rollover Resource Sharing Requests page (Acquisitions > Advanced Tools > Rollover Resource Sharing Requests).

Rollover Resource Sharing Requests List

The Rollover Resource Sharing Requests page displays the following information for each rollover job:

- Job ID number
- Status
- User that added the job
- Time the job started
- Time the job ended
- Number of requests rolled over in the job (Number finished)
- Number of failed rollovers in the job

To perform a PO line rollover:

Rollover Resource Sharing Requests

2. Enter the job information as required. A description of the fields is provided in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New encumbrance calculation</td>
<td>The way to calculate the encumbrances in the new fiscal period. Currently, the only option is Encumbrance, which adds all the encumbrances and moves them to the new fiscal period.</td>
</tr>
<tr>
<td>From year</td>
<td>The year from which to roll over the resource sharing requests. Select from the current or previous fiscal period.</td>
</tr>
<tr>
<td>Libraries</td>
<td>A library or libraries for which the resource sharing request rollover is to take effect. If you do not select a value in this field, rollover is performed for the entire institution.</td>
</tr>
<tr>
<td>Check over encumbrance</td>
<td>Whether to ensure that checking over-encumbrance rules of the fund/ledger are performed. Clear this option if you do not want over-encumbrance rules to be checked (such as for institutions whose funds do not have money because the ledger rollover runs without allocation).</td>
</tr>
<tr>
<td>Report mode</td>
<td>It is recommended that you select this to simulate a resource sharing requests rollover in test mode before generating a real resource sharing requests rollover. This option generates a report identifying any errors that need to be resolved. The rollover is simulated but no changes are made to the repository.</td>
</tr>
</tbody>
</table>

3. Select Add to roll over the resource sharing requests. Select Add and Close to roll over the resource sharing requests and close the dialog box. Alma runs the rollover job. The job is added to the Rollover Resource Sharing Requests page and runs immediately.

Select View in the row actions list to view details of the job. See Rollover PO Lines Job Report.

Select Events or Report in the row actions list to view the list of job events. See Viewing Job Events.
Patron Driven Acquisitions

To work with Patron Driven Acquisitions (PDA), you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager

Patron Driven Acquisitions (PDA) in Alma represents an agreement for a vendor to send e-resources to an institution that may be of interest to the institution. Resources are imported as a repository file and are published to the discovery layer to be accessed by patrons. To publish to the discovery layer, the relevant setting must be configured on the Import Profile Details page (see Importing Records Using Profiles).

Access is monitored by the vendor; when a predefined threshold is exceeded, the item is considered as if it is purchased and is sent as part of an EOD to Alma. Orders (marked as PDA) are loaded into Alma, and the vendor then sends the relevant invoices. At the end of the defined PDA period, PDA resources that were not purchased can be removed from Alma by the institution.

Patron Driven Acquisitions are managed on the Patron Driven Acquisitions page (Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)).

For a detailed presentation on PDA, see Acquisitions - Patron Driven Acquisitions (PDA) Demand Driven Acquisitions (DDA).pptx.

The following steps describe the workflow for working with PDAs.

1. Create a PDA. The PDA must be activated to continue in the workflow (see To create a new PDA entry below).
2. Manage profiles for the PDA (see To manage PDA profiles below). The profile must be activated to import a repository file.
3. The vendor sends a repository import file containing all of the titles that are associated with the PDA. Import the file to Alma (see To import a repository below; also see Importing Records Using an Import Profile). This step creates new bibliographic records and portfolios that are linked to the PDA profile. The titles are then published to the discovery system. The vendor monitors the usage of these titles by the patrons. Titles that are accessed more than a certain number of times (according to the PDA agreement) will be purchased by the library (next step).
4. The vendor sends an embedded order data (EOD) file containing the titles that the institution will purchase. Import the file to Alma (see To import PDA orders below; also see Importing Records Using an Import Profile). The import does not create inventory. Alma's matching process verifies that the related inventory items exist and are linked to the PDA and creates the PO lines for these orders (linked to the inventory). Note that only bibliographic records linked to the PDA are considered during the matching process.

Institutions that do not use EOD files must update each portfolio manually:
Perform a repository search to locate the portfolio; see Searching in Alma.

Select Order to create an order for the portfolio.

5. The vendor sends invoices (using EDI, for example) for purchased titles. At the end of the defined PDA period, PDA resources that were not purchased can be removed from Alma by the institution (see To clean up a PDA entry below).

---

**Note**

Instead of managing costs for each title, some institutions pay a specified amount to the vendor, who informs the institution of which titles were purchased. In these cases, you can add a note to the portfolio indicating that the title was purchased. You can add a note to multiple portfolios at once using a batch file in the portfolio loader.

You can also perform the following actions on the PDA, as needed:

- **Edit** – See To edit a PDA entry.
- **Duplicate** – See To duplicate an existing PDA entry.
- **Pause** – See To pause a PDA program.
- **Terminate** – See To terminate a PDA entry.
- **Cancel** – See To cancel a PDA entry.

---

**To create a new PDA entry:**

1. On the Patron Driven Acquisition (PDA) List page (Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA), select Add PDA. The PDA Details page appears.

   ![PDA Details Page](image)

   **PDA Details Page**

2. Fill in the fields on the page. A description of the fields is provided in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Network Zone</td>
<td>This field appears only in an institution that is a member of a collaborative network that implements a Network Zone. For an explanation of this option, see Selecting Where to Create New Bibliographic Records.</td>
</tr>
<tr>
<td>Name (required)</td>
<td>A descriptive name for the PDA entry.</td>
</tr>
<tr>
<td>Code (required)</td>
<td>A code for the PDA entry</td>
</tr>
<tr>
<td>Status</td>
<td>Select a status for the PDA. Choose from:</td>
</tr>
<tr>
<td>(required)</td>
<td>Active</td>
</tr>
<tr>
<td>---------------</td>
<td>---------</td>
</tr>
<tr>
<td></td>
<td>Canceled</td>
</tr>
<tr>
<td></td>
<td>Draft</td>
</tr>
</tbody>
</table>

**Note**
The default status is **Draft**. The status must be set to **Active** to enable continuing with the PDA workflow.

<table>
<thead>
<tr>
<th>Vendor (required)</th>
<th>Select the vendor that is supplying the e-resource.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start date (required)</td>
<td>Select the start date for the PDA.</td>
</tr>
<tr>
<td>End date</td>
<td>Select the end date for the PDA.</td>
</tr>
<tr>
<td>Access threshold</td>
<td>The number of access requests made for the e-resource upon which the institution agrees to purchase the resource. This value is for information only; the vendor checks the value and proceeds accordingly.</td>
</tr>
<tr>
<td>Budget threshold</td>
<td>The maximum amount of money that the institution is willing to pay for e-resources after the <strong>Access threshold</strong> has been reached. Also select a currency from the drop-down list.</td>
</tr>
</tbody>
</table>

**Note**
This value is for information only; Alma does not prevent resources from being accessed, even if the **Budget threshold** has been reached.

<table>
<thead>
<tr>
<th>Alert Percentage</th>
<th>When the PDA usage exceeds the alert percentage of the budget threshold, the PDA Threshold letter email notification (letter code: PdaThresholdLetter) is sent to the contact person after the <a href="https://support.exlibrisgroup.com/hc/en-us/articles/360090748923-PDA-Alert-PDA-Reached-Threshold">PDA - Alert PDA Reached Threshold job</a> runs.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The <strong>PDA - Alert PDA Reached Threshold</strong> job is set to automatically run once every day. After importing an EOD file, the job is run to determine whether an email notification is to be sent. For details on importing EOD files, see <a href="https://support.exlibrisgroup.com/hc/en-us/articles/360090748923-PDA-Alert-PDA-Reached-Threshold">Importing Records Using an Import Profile</a>.</td>
</tr>
<tr>
<td></td>
<td>For information on the PDA Threshold Letter, see <a href="https://support.exlibrisgroup.com/hc/en-us/articles/360090748923-PDA-Alert-PDA-Reached-Threshold">Configuring Alma Letters</a>.</td>
</tr>
<tr>
<td></td>
<td>For more information concerning the PDA alert, see the <a href="https://support.exlibrisgroup.com/hc/en-us/articles/360090748923-PDA-Alert-PDA-Reached-Threshold">PDA Alerts</a> video (4:33 mins).</td>
</tr>
<tr>
<td>Contact has been notified</td>
<td>This field is selected when the alert percentage was exceeded and an email notification was sent to the contact person.</td>
</tr>
<tr>
<td>License</td>
<td>Select a license or amendment to associate with the PDA. Note that this field is for informational purposes only.</td>
</tr>
<tr>
<td>Contact</td>
<td>Select a contact to associate with the PDA.</td>
</tr>
</tbody>
</table>

3. Select **Save** to store the information you entered and return to the Patron Driven Acquisition (PDA) List page.

**To edit a PDA entry:**

1. On the Patron Driven Acquisition (PDA) List page ([Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)](https://support.exlibrisgroup.com/hc/en-us/articles/360090748923-PDA-Alert-PDA-Reached-Threshold)), select **Edit** in the row actions list or select the PDA name. The **Summary** tab of the PDA Details page appears.
2. Edit the PDA Details information as required. For a description of the fields on this page, see To create a new PDA entry.

3. For information on the Attachments tab, see Attachments Tab.

4. For information about the Notes tab, see Notes Tab.

   Select the relevant option in the drop-down at the top of the page (Activate Notes or Dismiss Notes) to either mark notes as active (unread) or to dismiss displayed notes. Notes received are automatically labeled as Active. Dismissed notes are excluded from the Activate Notes facet, but are still included with their respective requests (they are not deleted).

5. Select Save to store the information you entered and return to the Patron Driven Acquisition (PDA) List page.

To manage PDA profiles:

On the Patron Driven Acquisition (PDA) List page (Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)), select Manage PDA Profiles in the row actions list. The Run Import page appears, where you can manage the profiles associated with the PDA. For details on profiles, see Importing Records Using Profiles.

---

Note

PDA profiles must be activated to import an EOD or a repository.

---

If you are working with EBL, ensure that you configure the following properties within your import profile:

- **PO line currency** – Note that only one currency is supported.
- **Decimal point location** – Set to 2.
- **List price field** – Set to 980b.
- **Default PO line owner** – Must be defined.
- **Fund distribution field** – Set to 981b (leave percent subfield empty).
- **Default fund** – Must be defined.
- **Vendor invoice number field** – Set to 980f in order to package all PO lines with the identical number in this field into one PO and create an invoice from this PO.

To import a repository:

On the Patron Driven Acquisition (PDA) List page (Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)), select Import Repository in the row actions list. The Start New Import page appears, where you select one or more repository files to import. Select Submit to import the selected files. Inventory items are created and published to the discovery system. See Importing Records Using an Import Profile.
To import PDA orders:

On the Patron Driven Acquisition (PDA) List page (Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)), select Import Orders in the row actions list. The Start New Import page appears, where you import an EOD of the PDA (see Importing Records Using an Import Profile). PO lines are then created, beginning the purchasing workflow (see Purchasing Workflow).

When importing PDA orders, ensure that .mrc files are encoded with MARC8 characters.

To duplicate an existing PDA entry:

1. On the Patron Driven Acquisition (PDA) List page (Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)), select Duplicate in the row actions list. The Summary tab of the PDA Details page opens. See To edit a PDA entry.

   The fields contain the same values as the original PDA entry, except that the Name and Code fields are empty.

2. Enter values for the Name and Code fields, and modify any other field values, as required.

3. Select Save to store the information you entered and return to the Patron Driven Acquisition (PDA) List page.

To pause a PDA program:

Select Pause in the row actions list on the Patron Driven Acquisitions (PDA) List page (Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)) and select Confirm in the confirmation dialog box.

Alma pauses the PDA program, and:

• Suppresses all bibliographic records that were already loaded for this PDA program but not yet purchased
• Prevents new bibliographic records being loaded for the PDA program

Select Resume in the row actions list to resume the PDA program.

For more information about pausing a PDA program, see the Pause PDA Program video (4:11 mins).

To terminate a PDA entry:

Select Terminate in the row actions list on the Patron Driven Acquisition (PDA) List page (Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)). Alma sets the PDA end date to the current date. Repositories can no longer be imported, although EODs can still be imported.

To clean up a PDA entry:

Select Cleanup in the row actions list on the Patron Driven Acquisition (PDA) List page (Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)) and select Confirm in the confirmation dialog box. Alma removes inventory items from the PDA that do not have PO lines associated with them.

---

Note

• To perform cleanup on a PDA, you must first terminate the PDA.
• After cleanup is performed, the PDA status is set to Canceled.
To cancel a PDA entry:

On the Patron Driven Acquisition (PDA) List page (Acquisitions > Advanced Tools > Patron Driven Acquisition (PDA)), select Cancel in the row actions list, and select Confirm in the confirmation dialog box. Alma sets the PDA end date to the current date and removes inventory items from the PDA that do not have PO lines associated with them. The PDA status is set to Canceled. PDA profiles in Canceled status can be removed by selecting Delete in the row actions list.

Note

Canceling a PDA entry performs both the Terminate and Cleanup actions.
Changing Vendors in PO Lines and POs

You can change the vendor account details of a PO line, a PO, or all POs associated with a single vendor, to that of another vendor.

To change a vendor in a PO line before it is packaged, see Editing PO Line Information. You can change the vendor in a PO line even after it was sent to the vendor. There are two business cases for this:

- The original vendor could not supply the item(s), so the PO line must be sent again to a new vendor.
- The original vendor is actually a supplier on behalf of another vendor, or the vendor has merged with a different vendor. In this case, the PO line is not sent again. The change simply reflects a correction in the PO line's information.

These changes can be made manually on the PO Line Summary page.

For more information about changing the vendor of a sent PO line, see the Change the Vendor of a Sent PO Line video (2:05 mins).

You can change the vendor for a PO or all POs associated with a vendor using the Update PO Lines Information job. Changing the vendor associated with a PO changes the vendor in all of its associated PO lines. Changing the vendor for all POs associated with a vendor affects all POs of that vendor that are not canceled.

Note

Changing the vendor of a sent PO line is not available using the Update PO Lines Information job.

To change a vendor in a sent PO line so that the PO line is sent to a new vendor:

To change the vendor account details for PO lines, you must have a role that enables you to edit PO lines.

1. Open a one-time PO line with status Sent, or a continuous PO line with status Sent or Waiting for auto/manual renewal, for edit. See Searching in Alma. The PO Line Summary page appears (see Manually Creating a PO Line).

   You cannot change the vendor of (and resend) a one-time PO line if any of its resources were already activated or received.

2. Select Change Vendor.

   A confirmation dialog box appears. The message in this box states that the PO line will be sent again.

3. Select Confirm in the confirmation dialog box. The Change Vendor in Order dialog box appears.

   Change Vendor in Order Dialog Box

4. Select a new vendor and select Change Vendor in Order. The vendor is changed. The PO line is removed from the PO, and if this is the only PO line in the PO, the PO is deleted. The PO line's status changes to In Review and progresses as usual through the purchasing workflow.
To change a vendor in a sent PO line without sending the PO line again:
To change the vendor account details for PO lines, you must have a role that enables you to edit PO lines.

1. Open a one-time PO line with status Sent or Waiting for Invoice, or a continuous PO line with status Sent or Waiting for auto/manual renewal, for edit. See Searching in Alma. The PO Line Summary page appears (see Manually Creating a PO Line).
2. Select Replace (only) Vendor.
   
   A confirmation dialog box appears. The message in this box states that the PO line will not be sent again.
3. Select Confirm in the confirmation dialog box. The Change Vendor in Order dialog box appears (see above).
4. Select a new vendor and select Change Vendor in Order. The vendor is changed. The PO line is removed from the PO, and if this is the only PO line in the PO, the PO is deleted. The PO line’s status changes to In Review and progresses as usual through the purchasing workflow. When this PO line is packed into a PO, it is not sent to the vendor.

To change the vendor account details for POs associated with a vendor:
To change the vendor account details for POs, you must have one of the following roles:

- Purchasing Operator
- Purchasing Manager

You change vendor account details on the Change Vendor in Order page (Acquisitions > Advanced Tools > Change Vendor in Order).

1. On the Change Vendor in Order page (Acquisitions > Advanced Tools > Change Vendor in Order), select Add Job. The Add Job dialog box appears:
2. In the Source vendor/account field, select the original vendor.
3. In the Target vendor/Account field, select the new vendor.
4. To restrict the vendor change to a specific PO, select a PO. The Source vendor/account field become disabled and set to the source vendor/account of the selected PO.

   If a PO is selected, the change affects all PO lines associated with the PO, including closed PO lines. If no PO is selected, the change affects all PO lines in active POs for the selected source vendor/account.
5. Select **Add** or **Add and Close**.

   The vendor account details for the PO/PO lines are changed without changing the status of the PO/PO lines.

For more information on changing the vendor account details, see the [Change Vendor of a Purchase Order](#) video (3:14 mins).
Configuring Acquisitions

This section includes:

- Configuring Acquisition Activities
- Configuring Reporting Codes
- Configuring Purchasing Review Rules
- Configuring Shipping Methods
- Configuring PO Line Cancellation Reasons
- Enabling/Disabling PO Line Types
- Configuring PO Line Deferral Reasons
- Configuring Acquisition Methods
- Configuring PO Line Search Field Options
- Configuring Invoice Review Rules
- Configuring Invoice Approval Rules
- Configuring Invoice Disapproval Reasons
- Configuring VAT Codes
- Configuring Payment Methods
- Configuring Invoice Line Types
- Configuring License Sections Order
- Managing License Terms
- Configuring License Storage Locations
- Configuring License Review Statuses
- Viewing User-Created License Terms that Appear in Primo
- Configuring License Term Controlled Vocabulary Values
- Configuring Other Settings (Acquisitions)
- Configuring Currencies
- Configuring Fund and Ledger Fiscal Periods
- Configuring Receiving Departmental Validations
- Configuring Fund Types
- Configuring Acquisition Jobs
- Configuring Purchase Request Reject Reasons
- Configuring Legal Deposit Report Paths
- Configuring Multiple Choice Survey Questions
- Configuring EDI Vendor Note Fields
- Managing Access Models
• Configuring Purchase Request Material Types

In addition, see Configuring COUNTER Subscribers.
Configuring Acquisition Activities

To configure acquisition activities, you must have the following role:

- Acquisitions Administrator

The infrastructure for the acquisition workflows involves configuration of Alma functionality with regards to POs, invoices, licenses, and other activities, and includes setting rules for the workflows for these processes.

**Note**

- The location filter on this page is disabled. Acquisitions configuration is at the institution level, not the library level.
- Note that some configuration changes in Acquisitions impact other functional areas. Consider the impact on other functional areas before making changes to existing configurations.

The following table lists the available configuration options.

<table>
<thead>
<tr>
<th>Configuration Options</th>
<th>Configuration Item</th>
<th>Configuration Level</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Orders</td>
<td>Reporting Codes</td>
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<tr>
<td></td>
<td>Secondary Reporting Codes</td>
<td>Institution</td>
<td></td>
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<tr>
<td></td>
<td>Tertiary Reporting Codes</td>
<td>Institution</td>
<td></td>
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<td></td>
<td>Purchasing Review Rules</td>
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<td>Shipping Method</td>
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<td>PO Line Deferral Reasons</td>
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<td>Acquisition Method</td>
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<tr>
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<td>Searchable Columns</td>
<td>Institution</td>
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</tbody>
</table>

**Note**

This page is no longer in use.
<table>
<thead>
<tr>
<th>Category</th>
<th>Setting</th>
<th>Type</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Invoices</td>
<td>EDI Vendor Note Fields</td>
<td>Institution</td>
<td>Configuring EDI Vendor Note Fields</td>
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<tr>
<td></td>
<td>Invoice Review Rules</td>
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<td>Configuring Invoice Review Rules</td>
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<td>Invoice Approval Rules</td>
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<td>Configuring Invoice Approval Rules</td>
</tr>
<tr>
<td></td>
<td>Disapproval Reasons</td>
<td>Institution</td>
<td>Configuring Invoice Disapproval Reasons</td>
</tr>
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<td></td>
<td>VAT Codes</td>
<td>Institution</td>
<td>Configuring VAT Codes</td>
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<tr>
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<td>Payment Method</td>
<td>Institution</td>
<td>Configuring the Default Payment Method</td>
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<tr>
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<td>Invoice Line Types</td>
<td>Institution</td>
<td>Configuring Invoice Line Types</td>
</tr>
<tr>
<td></td>
<td>This link appears only after enabling the customer parameter invoice_ split_additional_charges (see Configuring Other Settings)</td>
<td>Institution</td>
<td>Configuring Invoice Line Types</td>
</tr>
<tr>
<td>Licenses</td>
<td>Sections Order</td>
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<td>Configuring Sections Order</td>
</tr>
<tr>
<td></td>
<td>Manage License Terms</td>
<td>Institution</td>
<td>Managing License Terms</td>
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<tr>
<td></td>
<td>License Storage Location</td>
<td>Institution</td>
<td>Configuring License Storage Locations</td>
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<tr>
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<td>Access Model</td>
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<td>Manage Access Models</td>
</tr>
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<td>License Review Status</td>
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<td>Configuring License Review Status</td>
</tr>
<tr>
<td></td>
<td>Discovery Interface Labels Customized</td>
<td>Institution</td>
<td>Viewing User-Created License Terms that Appear in Primo</td>
</tr>
<tr>
<td></td>
<td>License Term Controlled Vocabulary</td>
<td>Institution</td>
<td>Configuring License Term Controlled Vocabulary Values</td>
</tr>
<tr>
<td>Purchase Requests</td>
<td>Purchase Request Reject Reasons</td>
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<td>Configuring Purchase Request Reject Reasons</td>
</tr>
<tr>
<td></td>
<td>New for June! Purchase Request Material Types</td>
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<td>Configuring Purchase Request Material Types</td>
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<td>Other Settings</td>
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<tr>
<td>Acquisition Jobs Configuration</td>
<td>Institution</td>
<td>Configuring Acquisition Jobs</td>
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<tr>
<td>Legal Deposit Reports</td>
<td>Institution</td>
<td>Configuring Legal Deposit Report Paths</td>
<td></td>
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<tr>
<td>Survey Question Multiple Choice</td>
<td>Institution</td>
<td>Configuring Multiple Choice Survey Questions</td>
<td></td>
</tr>
</tbody>
</table>
Configuring Reporting Codes

To configure reporting codes, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You define primary, secondary, and/or tertiary reporting codes that can be used for analyzing acquisitions in subsequent reporting. These codes appear in Alma in drop-down lists on the PO line Summary tab (see Manually Creating a PO Line). For example, if you have a reporting code for postage, you can then create a report that lists all PO lines that have the postage reporting code. Reporting codes apply to all libraries within your institution.

You configure reporting codes on the primary, secondary, and tertiary reporting code tables (Configuration Menu > Acquisitions > Purchase Orders > Reporting Codes, Configuration Menu > Acquisitions > Purchase Orders > Secondary Reporting Codes, and Configuration Menu > Acquisitions > Purchase Orders > Tertiary Reporting Codes). For more information about code tables, see Code Tables.

![Reporting Code Page](image)

You can add, import, edit, and delete (if you want to remove them permanently from the system) reporting codes. You can also enable/disable codes to control which codes appear in the drop-down list, reorder how they appear in the drop-down list, and select the default code. The default code is used for all open PO lines that do not have a code selected.
Configuring Purchasing Review Rules

To configure purchasing review rules, you must have the following role:

- Acquisitions Administrator
- General System Administrator

Purchasing review rules define whether automatically created PO lines undergo manual review or are sent immediately to packaging. The rules apply to all types of PO lines created and to all libraries within the institution.


The rules are checked for each automatically created PO line, as soon as a rule matches the PO line, its Result (Output Parameters) is checked. If the result is True, the PO line is sent for review; otherwise, the PO line continues on to packaging. The default rule is checked first. The default rule has no criteria that can be configured; it can only be True or False, as follows:

- True – All PO lines are sent for review.
- False – The rules are checked to see if the PO line is sent for review. If there are no other rules, or none of the rules match, the PO line is not sent for review and proceeds to packaging.

Add or edit rules on the Purchasing Review Rules page (select Add Rule or select Edit in the row actions list).

Note

- These rules apply only to PO lines created automatically; manually created PO lines skip the review process if you select Order Now or Save and Continue, or remain In Review if you do not (for example, if you select Save).
- Unlike most rules tables, the default purchasing review rule is checked first.
See the following table for a description of the criteria (input parameters). For **Result**, **True** indicates that the PO line is sent for review. **False** indicates that the PO line is not sent for review and proceeds to packaging.

### Purchasing Review Rules Input Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssertionCode</td>
<td>The type of generated alert. An Assertion Code must be specified for the Purchasing Rules to be invoked. These alerts may appear when creating or saving a PO line manually (see Manually Creating a PO Line), when importing EOD records (see Importing Records Using an Import Profile), or when using the API (see <a href="https://developers.exlibrisgroup.com/alma/apis/acq">https://developers.exlibrisgroup.com/alma/apis/acq</a>). Possible values are:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Already have inventory</strong> – The PO line item already exists in your inventory.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Duplicated active orders</strong> – The PO line's item is already part of another, active PO line.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> In the same scenario, when saving a PO line, the message <strong>There is an active order &lt;order number&gt; for this ordered resource</strong> appears in the confirmation dialog box.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Electronic collection already exists in the repository</strong> – The PO line electronic collection already exists in the repository.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Electronic resource was not activated</strong> – The PO line electronic resource was not activated. This alert can appear after the PO line is sent.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Fund is overencumbered</strong> – The PO line or invoice links to funds that were overencumbered and there is an active overexpenditure rule with a warning threshold, which has been reached. This means that the fund is approaching its limit and will not be able to have additional encumbrance or expenditure transaction.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Funds from different ledgers</strong> – The funds stipulated in the PO line belong to different ledgers.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Invoicing Status</strong> – Not in use.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Items already exist in the repository</strong> – The physical item already exists in the repository. In other words, the order is for a bibliographic record that already has physical inventory.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Mandatory information is missing or erroneous</strong> – Information included in the PO line is either insufficient or incorrect.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Not fully received</strong> – The PO line has not been fully received. For example, three items were ordered but only two arrived. If you are not expecting the remaining items and want to close the PO line, update the PO line to reflect the number of received items. The PO line may then be closed.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Open claims exist for this PO line</strong> – Not in use.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Overdue PO line</strong> – The expected receipt date of the PO line has passed. The PO line will appear on the Claims page.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
</tr>
<tr>
<td>PO line created by EOD</td>
<td>The PO line was created using EOD.</td>
</tr>
<tr>
<td>Previously canceled ordered resource</td>
<td>The PO line was previously part of a PO that was canceled. The PO line is now linked to the bibliographic record instead of the item. If you see this message in the UI, you should link the PO line to an item.</td>
</tr>
<tr>
<td>Price limit reached</td>
<td>The PO line price is greater than a specified value (10,000 by default). This number can be customized using the parameter <code>assertion_over_po_line_price</code>. For details, see Configuring Other Settings. This alert can appear after the PO line is sent.</td>
</tr>
<tr>
<td>Purchase decision exists</td>
<td>A decision was made by the Trial Manager to purchase the PO line item.</td>
</tr>
<tr>
<td>Receiving Status</td>
<td>Not in use.</td>
</tr>
<tr>
<td>Reminder date has arrived</td>
<td>The deferral reminder date (if one exists) for the PO line (located on the Review Deferred page) has arrived.</td>
</tr>
<tr>
<td>Renewal date past the subscription end date</td>
<td>The PO line's renewal date is later than the date on which the subscription ends. The PO line for renewal appears in the Waiting for Renewal task list. If you see this message in the UI, close the PO line or update the PO line's renewal date.</td>
</tr>
<tr>
<td>Reporting code is missing</td>
<td>A reporting code was not entered for the PO line. The reporting code appears in the PO Line Details area on the Summary tab. Reporting codes are often used as part of the report creation process for Alma Analytics. Similar alerts appear for secondary or tertiary reporting codes, if they are defined in Alma but not assigned to the PO line.</td>
</tr>
<tr>
<td>Subscription is inactive</td>
<td>The expected receipt date of the PO line has passed, but no claim was made on the PO line. This alert can appear after the PO line is sent.</td>
</tr>
<tr>
<td>The bib record is brief</td>
<td>The record is brief/short and must be extended/replaced. You see this message less frequently by lowering the brief level threshold. See the <code>brief_level</code> parameter in Configuring Other Settings (Resource Management).</td>
</tr>
<tr>
<td>The bib record is series/book set</td>
<td>The record is part of a series. This may mean that a monograph order PO line type was used for a journal/serial bibliographic record.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Acquisition Method</th>
<th>The method used to acquire the item. See Configuring Acquisitions Methods.</th>
</tr>
</thead>
<tbody>
<tr>
<td>VendorCode</td>
<td>The vendor.</td>
</tr>
<tr>
<td>POLineType</td>
<td>The type of purchase (for example, printed book, audio visual material, and so forth). See Enabling/Disabling PO Line Types.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SourceType</th>
<th>The process that created the PO line. The available options are:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selection Item</td>
<td>• Selection Item</td>
</tr>
<tr>
<td>Import EOD</td>
<td>• Import EOD</td>
</tr>
<tr>
<td>Import Shelf Ready</td>
<td>• Import Shelf Ready</td>
</tr>
<tr>
<td>API</td>
<td>• API</td>
</tr>
<tr>
<td>Purchase Request</td>
<td>• Purchase Request</td>
</tr>
<tr>
<td>Any</td>
<td>• Any</td>
</tr>
</tbody>
</table>
Configuring Shipping Methods

To configure shipping methods, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can define shipping methods that can be entered when packaging PO lines.

These shipping methods appear in the Shipping Method drop down list on the PO Summary page when reviewing POs. See Packaging PO Lines into a PO. The order they appear in the drop down list is the order they appear in this table. The default option selected in the drop down list is the one marked in this table.

Shipping methods can be added to Alma manually or imported. If you import shipping methods to Alma, you delete any previously configured shipping methods.

You configure shipping methods on the Shipping Method code table (Configuration Menu > Acquisitions > Purchase Orders > Shipping Method). For more information about code tables, see Code Tables.

You can add, edit, and delete shipping methods. You can also activate/deactivate methods, reorder how they appear in the drop-down list, and select the default method.
Configuring PO Line Cancellation Reasons

To configure PO line cancellation reasons, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can define PO line cancellation reasons that can be used when canceling PO lines. See Canceling PO Lines.

You configure PO line cancellation reasons on the PO Line Cancellation Reasons Code Table page (Configuration Menu > Acquisitions > Purchase Orders > PO Line Cancellation Reasons). For more information about code tables, see Code Tables.

You can add, edit, or delete a cancellation reason. You can also activate/deactivate reasons, reorder how they appear in the drop-down list, and select the default reason.
Enabling/Disabling PO Line Types

To configure PO line types, you must have the following role:

- Acquisitions Administrator
- General System Administrator

When creating a *Purchase Order* line, or a PO line (see *Manually Creating a PO Line*), you must assign it a *PO line type*, or *purchase type*. For an explanation of the physical and electronic purchase types that can be created from your search results, see *Explanation of Purchase Types Workflow and Inventory*.

When creating a PO line manually, for example after searching in the repository, certain enabled PO line types are presented as recommended, depending on the bibliographic record for which you are creating the PO line. However, you can assign any of the enabled PO line types to the PO line, not just the recommended ones (except when creating a PO line after searching the inventory for an electronic collection or portfolio; see the table below).

You can enable or disable PO line types. Disabled PO lines types are not available to assign to PO lines. Disabling a PO line type has no effect on existing PO lines with that type.

You enable or disable PO line types on the PO Line Type mapping table page (*Configuration Menu > Acquisitions > Purchase Orders > PO Line Types*). No other changes can be made on this page. For more information about mapping tables, see *Mapping Tables*.

For more information, see *Explanation of Purchase Types Workflow and Inventory*.

![Mapping Table Page – PO Line Types](image)

The following table lists the purchase types on the PO Line Types page. **N/A** indicates that the purchase type is not available for the item/order type after searching the repository for that resource type and selecting *Order*.

<table>
<thead>
<tr>
<th>PO Line Type</th>
<th>Code</th>
<th>Description</th>
<th>Electronic Portfolio - Main PO Line</th>
<th>Electronic Collection - Main PO Line</th>
<th>Electronic Portfolio / Collection - Additional PO Line</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Type - Subscription</td>
<td>ACCESS_SERVICE_CO</td>
<td>Access subscription to an electronic service</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PO Line Type</td>
<td>Code</td>
<td>Description</td>
<td>Electronic Portfolio - Main PO Line</td>
<td>Electronic Collection - Main PO Line</td>
<td>Electronic Portfolio / Collection - Additional PO Line</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>--------------------------</td>
<td>-----------------------------------------------------------</td>
<td>-------------------------------------</td>
<td>--------------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Database Service - One Time</td>
<td>DB_SERVICE_OT</td>
<td>One time access to a database service</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital - Non Archiving</td>
<td>DIGITAL_NONARCHIVING</td>
<td>Digital purchase without inventory</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Electronic Book - Subscription</td>
<td>E_BOOK_CO</td>
<td>Subscription to an electronic book series</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Electronic Book - One Time</td>
<td>E_BOOK_OT</td>
<td>One time purchase of an electronic book</td>
<td></td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Electronic Book - Standing Order</td>
<td>E_BOOK_SO</td>
<td>Standing order for the purchase of electronic books</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Electronic Journal - Subscription</td>
<td>E_JOURNAL_CO</td>
<td>Subscription to an electronic journal</td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td>Electronic Journal - One Time</td>
<td>E_JOURNAL_OT</td>
<td>One time purchase of an electronic journal issue</td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td>Electronic Collection - Subscription</td>
<td>ELECTRONIC_COLLECTION_CO</td>
<td>Subscription to a collection of portfolios</td>
<td>N/A</td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td>Electronic Collection - One Time</td>
<td>ELECTRONIC_COLLECTION_OT</td>
<td>One time purchase of a collection of portfolios</td>
<td>N/A</td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td>Electronic Title - Standing Order</td>
<td>ELECTRONIC_SO</td>
<td>Standing order for the purchase of electronic titles</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Electronic Title - One Time</td>
<td>ELECTRONIC_TITLE_OT</td>
<td>One time purchase of an electronic title</td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td>Electronic Title - Subscription</td>
<td>ELECTRONIC_TITLE_CO</td>
<td>Subscription to an electronic title series</td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td>Manuscript</td>
<td>MANUSCRIPT</td>
<td>Purchase of a physical manuscript</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Map</td>
<td>MAP_OT</td>
<td>Purchase of a physical map</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Microform</td>
<td>MICROFORM</td>
<td>Purchase of a physical microform</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Mixed Material</td>
<td>MIXED</td>
<td>Purchase of an item with multiple physical</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>PO Line Type</td>
<td>Code</td>
<td>Description</td>
<td>Electronic Portfolio - Main PO Line</td>
<td>Electronic Collection - Main PO Line</td>
<td>Electronic Portfolio / Collection - Additional PO Line</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------</td>
<td>-------------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Other Service - Subscription</td>
<td>OTHER_SERVICES_CO</td>
<td>Any other subscription purchase</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Service - One Time</td>
<td>OTHER_SERVICES_OT</td>
<td>Any other one time service or access purchase</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical - Archiving</td>
<td>PHYSICAL_ARCHIVING</td>
<td>Physical order without inventory, for reporting purposes</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Physical Computer File - Subscription</td>
<td>PHYSICAL_CF_CO</td>
<td>Software subscription that comes on CD/DVD</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Physical Computer File - One Time</td>
<td>PHYSICAL_CF_OT</td>
<td>One time purchase of a software item on CD/DVD</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Physical - Subscription</td>
<td>PRINT_Co</td>
<td>Any other subscription for physical items (games, posters, ...)</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Physical - One Time</td>
<td>PRINT_OT</td>
<td>Any other one time physical item purchase</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Physical - Standing Order Monograph</td>
<td>PRINT_SO</td>
<td>Any other standing order for single physical items</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Physical - Standing Order Non Monograph</td>
<td>PRINT_SO_NONMON</td>
<td>Any other standing order for physical items in multiple parts</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Print Book - One Time</td>
<td>PRINTED_BOOK_OT</td>
<td>One time physical book purchase</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Print Book - Standing Order</td>
<td>PRINTED_BOOK_SO</td>
<td>Standing order for purchasing physical books</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Print Journal - Subscription</td>
<td>PRINTED_JOURNAL_CO</td>
<td>Subscription to a physical journal</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Print Journal - One Time</td>
<td>PRINTED_JOURNAL_OT</td>
<td>One time purchase of a physical journal issue</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>PO Line Type</td>
<td>Code</td>
<td>Description</td>
<td>Electronic Portfolio - Main PO Line</td>
<td>Electronic Collection - Main PO Line</td>
<td>Electronic Portfolio / Collection - Additional PO Line</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------</td>
<td>-------------------------------------------------------</td>
<td>-------------------------------------</td>
<td>--------------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Sound Recording</td>
<td>RECORD_OT</td>
<td>Sound or music on CD or another audio format</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Remote Computer File - Subscription</td>
<td>REMOTE_CF_CO</td>
<td>Subscription to software or a web site</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Remote Computer File - One Time</td>
<td>REMOTE_CF_OT</td>
<td>One time software or web site access purchase</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Musical Score</td>
<td>SCORE_OT</td>
<td>Purchase of sheet music or notations</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Visual Material</td>
<td>VISUAL_MTL_OT</td>
<td>Video or pictures on DVD or other visual format</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Configuring PO Line Deferral Reasons

To configure PO line deferral reasons, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can define a list of deferral reasons from which the Purchasing Operator can select when deferring a PO line. See Deferring PO Lines.

You configure deferral reasons on the PO Line Deferring Reasons code table (Configuration Menu > Acquisitions > Purchase Orders > PO Line Deferral Reasons). For more information about code tables, see Code Tables.

Code Table Page – Deferral Reasons

You can add, edit, and delete deferral reasons. You can also activate/deactivate reasons, reorder how they appear in the drop-down list, and select the default reason.
Configuring Acquisition Methods

To configure acquisition methods, you must have one of the following roles:

- Acquisitions Administrator
- General System Administrator

You can enable or disable acquisition methods and configure the default acquisition method that appears in the **Acquisition method** drop-down list when creating new PO lines. For information on these methods, see the table **Acquisition Methods** in *Manually Creating a PO Line*.

These actions are performed on the Acquisition Method code table (**Configuration Menu > Acquisitions > Purchase Orders > Acquisition Method**). For more information about code tables, see **Code Tables**.

---

**Acquisition Method**

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**Note**

- You cannot add, edit, or delete methods. When configuring a default acquisition method, existing PO lines are not affected by this configuration.

- For each acquisition method, there are two records, one that sends a letter to the vendor and one that does not. By default, one of each is disabled. These may be enabled to display both options in the **Acquisition method** drop down box in the Purchase Order Line Details.
Configuring PO Line Search Field Options

To configure acquisition activities, you must have the following role:

- Acquisitions Administrator

The PO Line List Searchable Columns code table (Configuration Menu > Acquisitions > Purchase Orders > Searchable Columns) is no longer in use. The PO line search list is in alphabetical order to help you find the search value quickly, while the recent history displays the most used fields.
Configuring Invoice Review Rules

To configure invoice review rules, you must have the following role:

- Acquisitions Administrator
- General System Administrator

Invoice review rules determine whether invoices are sent for manual review. See Reviewing Invoices. The rules apply to automatically created invoices that have passed an initial validation but have generated an alert. The rules apply to all libraries in the institution.


Invoice Review Rules Page

The default rule has no configuration parameters and can only be set to True or False, as follows:

- True – Send for review.
- False – Don’t send for review and proceed to approval. This is the default.

Add or edit rules on the Invoice Review Rules page (select Add Rule or select Edit in the row actions list).

Invoice Review Rules (Add/Edit) Page

See the following table for the criteria (input parameters). For Result, True indicates that the invoice is sent for review. False indicates that the invoice is not sent for review and is sent for approval.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssertionCode</td>
<td>The type of generated alert. Possible values are:</td>
</tr>
</tbody>
</table>
- **Additional invoice lines are linked to the same PO line** – The invoice contains multiple invoice lines that are linked to the same PO line.

- **Currency different from PO** – The currency of the invoice is different than the currency of the linked PO lines.

- **High total price** – The invoice total price is greater than the value in the parameter `invoice_high_total_price`. For details, see Configuring Other Settings.

- **High total price use currency** – The invoice total price, after being converted to the local currency, is greater than the value in the parameter `invoice_high_total_price`. Used when the parameter `invoice_high_total_use_currency` is set to true. For details, see Configuring Other Settings.

- **Invoice holds vendor account different than some of the linked PO lines** – The vendor account of the invoice is different than the vendor accounts of the linked PO lines.

- **Invoice includes negative discount** – The invoice’s discount value is negative, thereby raising the invoice price.

- **Invoice was rejected by external finance system** – The invoice was rejected by an external finance system. An invoice may be rejected if it has missing or incorrect information. A rejected invoice is sent for review, to be attended to by a library staff person (see Reviewing Invoices).

- **Invoice with a canceled PO line** – The invoice contains an invoice line that is linked to a canceled PO line.

- **Invoice with the same number exists** – Other invoices exist with the same number.

- **Invoiced after cancellation** – Not in use.

- **Lines not linked** – The invoice contains invoice lines not linked to PO lines.

- **Lines not ready** – The invoice contains invoice lines with status not ready.

- **Some linked PO lines’ payment method is different than invoice** – The payment method of the invoice is different than the payment methods of the linked PO lines.

- **Total amount of discrepancy** – The invoice’s total price is different than the calculated total price of the invoice lines.

- **Vendor is liable, but VAT is missing** – The vendor is liable for VAT, but no VAT is specified in the invoice.

- **Vendor is not liable, but VAT exists** – The vendor is not liable for VAT, but the invoice specifies a VAT amount.

| VendorCode | The vendor. |
| InvoiceLineNumber | The invoice line number. To match all invoice line numbers, enter an asterisk (*) in this field. |
| InvoiceCreationFormOptions | The process that created the invoice. Options are:  
- EDIteur Invoice Message  
- From PO  
- Loader  
- Manually (ignore this option; it should not appear here)  
- Any |
Configuring Invoice Approval Rules

To configure invoice approval rules, you must have the following role:

- Acquisitions Administrator
- General System Administrator

Invoice approval rules determine whether an invoice requires manual approval. See Approving Invoices. The rules apply to all libraries in the institution.

You configure invoice approval rules from the Invoice Approval Rules page (Configuration Menu > Acquisitions > Invoices > Invoice Approval Rules). For more information about rules tables, see Rules Tables.

Add or edit rules on the Invoice Approval Rules page (select Add Rule or select Edit in the row actions list).

Each invoice approval rule can be either enabled or disabled. By default, each new rule is enabled.

See the following table for the criteria (input parameters). For Result, True indicates that the invoice is sent for review. False indicates that the invoice is not sent for review and is sent for approval.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssertionCode</td>
<td>The type of generated alert. For a list of possible values, see Invoice Review Rules Input Parameters.</td>
</tr>
<tr>
<td></td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>VendorCode</td>
<td>The vendor.</td>
</tr>
<tr>
<td>InvoiceLineNumber</td>
<td>The invoice line number.</td>
</tr>
<tr>
<td>InvoiceCreationFormOptions</td>
<td>The process that created the invoice. Options are:</td>
</tr>
<tr>
<td></td>
<td>• EDIteur Invoice Message</td>
</tr>
<tr>
<td></td>
<td>• From PO</td>
</tr>
<tr>
<td></td>
<td>• Loader</td>
</tr>
<tr>
<td></td>
<td>• Manually</td>
</tr>
<tr>
<td></td>
<td>• Any</td>
</tr>
</tbody>
</table>
Configuring Invoice Disapproval Reasons

To configure disapproval reasons, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can define reasons to use when sending an invoice back for review (Need Additional Review) while reviewing invoices waiting for approval. See Approving Invoices.

You configure disapproval reasons on the Invoice Disapprove Reasons code table (Configuration Menu > Acquisitions > Invoices > Disapprove Reasons). For more information about code tables, see Code Tables.

You can add, edit, delete, enable/disable, and reorder the reasons, and you can select the default reason.
Configuring VAT Codes

To configure VAT Codes, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can configure a VAT code to establish a VAT percentage that can be assigned to an invoice or invoice line, instead of manually entering a VAT percentage or amount on the invoice/invoice line level. The VAT code is selected on the Invoice Details page when configuring an invoice (see the Invoice Details Page Fields table in Creating Invoices), and on the Add Invoice Line page when configuring an invoice line (see the Add Invoice Line Dialog Box Fields table in Creating Invoices).

You configure VAT codes on the VAT Percentage Codes mapping table (Configuration Menu > Acquisitions > Invoices > VAT Codes). For more information about mapping tables, see Mapping Tables.

![VAT Percentage Codes Mapping Page](image)

When adding a new VAT percentage, enter a numerical percentage and description of this percentage.
Configuring Payment Methods

To configure payment methods, you must have one of the following roles:

- Acquisitions Administrator
- General System Administrator

You can configure the payment methods that appear in the Payment method drop-down list when creating new invoices (see Creating an Invoice From a PO or Manually), or in the Payment Methods section when creating a new vendor account. The payment method designated as the default in the code table is selected by default when creating a new vendor account. If a payment method is defined as the default but it is not enabled, the first enabled payment method will be used.

You configure the payment methods on the Payment Method code table (Configuration Menu > Acquisitions > Invoices > Payment Method). For more information about code tables, see Code Tables.

Payment Method Code Table

You can enable or disable a payment method, select the default method to be displayed, and change the display names (Description).
Configuring Invoice Line Types

The following roles can configure which additional charges are available to add to invoices:

- Acquisitions Administrator
- General System Administrator

Out of the box, the special invoice lines **Shipment**, **Insurance**, **Overhead**, and **Discount** automatically appear for each new invoice, and you can enable additional lines of these types, as well as lines of type **Other** or **Regular**. See **Additional Charges** in Creating Invoices.

You can enable additional line types that can be added to invoices on the new Invoice Line Types code table (Configuration Menu > Acquisitions > Invoices > Invoice Line Types). This link appears only after enabling the customer parameter `invoice_split_additional_charges` (see Configuring Other Settings). For more information about code tables, see Code Tables.

**Note**

- You can enable up to five additional line types.
- Each invoice can contain only up to five types of invoice lines.

---

Invoice Line Types Code Table

For more information, watch the Additional Invoice Charges video (2:36)

The lines that can be made available for invoices include:

- All
- Regular
- Other
- Additional Charges
- Shipment
- Insurance
• Discount
• Overhead
• Adjustment - This line type is used when Expended for Fund is not selected for the invoice; see Creating an Invoice From a PO or Manually.
• Supply of approvals/book collections
• Barcode labelling
• Classification
• General servicing by library bookseller
• Binding
• Sleeving
• Data communication
• Miscellaneous servicing
• Audio/CD-ROM packaging
• Security fitting
• Cataloguing services
• Commission
• Delivery
• Exchange rate guarantee charge
• Handling charge
• Small order surcharge
• Insurance charge
• Posting charge
• Packing charge
• Postage and packing charge
• Special handling
• Miscellaneous credit adjustment
• Miscellaneous charge

After you enable a line type, you can add it as an invoice line to the invoice on the Add Invoice Line dialog box. Alternately, you can specify its value as a pro rata Additional Charge if you check Use Pro Rata in the Additional Charges area on the Summary tab of the Invoice Details page. For more information, see Creating Invoices.

Enabled line types can also be read from incoming EDI invoices. Any EDI additional charges that do not match enabled types are added to an invoice line Overhead.
Configuring License Sections Order

To configure the order of sections, you must have one of the following roles:

- Acquisitions Administrator
- General System Administrator

License sections appear in the License Terms tab of the License Term Details page (see Adding a License). The names of the sections are predefined by Alma, so you cannot create new section names, but you can change the order in which they appear. In addition, you can enable or disable sections.

You configure section order on the License Sections Order mapping table (Configuration Menu > Acquisitions > Licenses > Sections Order). For more information about mapping tables, see Mapping Tables.

![Mapping Table Page – Sections Order](image)

You cannot edit the name of a section. You cannot directly change the section order number; to change the order of the sections, delete the section and then add the section in the correct order.
Managing License Terms

To configure license terms, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can configure, reorder, and add license terms that you want to appear in the different sections of the License Terms tab on the License Term Details page. See Managing Licenses and Amendments.

You manage license terms on the Manage License Terms page (Configuration Menu > Acquisitions > Licenses > Manage License Terms).

![Manage License Terms Page](image)

User-defined license terms appear at the bottom of the page:

![Manage License Terms Page with User-Defined Term](image)

Perform one or more of the following procedures. When you are done, select Save.

To add a license term:

1. Select Add License Term. The Add License Term dialog box appears.

![Add License Term Dialog Box](image)

2. Enter a term Name and a unique Code.
3. Select the **License Term Type**. The options are:
   - **FREE-TEXT** - Free text
   - **LicenseTermsPermittedProhibited** - Permitted or prohibited options: Uninterpreted, Not Applicable, Silent, Prohibited, and Permitted. These terms conform to Digital Library Federation (DLF) standards.
   - **LicenseTermsRenewalType** - Renewal type options: Explicit and Automatic
   - **LicenseTermsUOM** - Calendar selection: Week, Calendar Day, Month, and Business Day
   - **LicenseTermsYesNo** - Yes or No options.
   - **Controlled Vocabulary** - Create your options for the drop-down after creating this type
     Watch Adding a Controlled Vocabulary for Local License Terms video.
   - **NUMERIC** - A numeric field
     Note that free text is accepted for this field; an entered value is not validated to be numeric.
     Note that you cannot add new license term types. Also, once you save the license term, you cannot change its type.

4. Select the **License Section** in which the term will appear.

5. Enter a sequence number in **Order in Section** to configure where, within the section, the term will appear.

6. Select **Display To Public** to have the term appear in the **View It** tab.

    **Note**
    Any terms you create where Display To Public is enabled also appear in the Discovery Interface Labels Custom code table. See Viewing User-Created License Terms that Appear in Primo.

7. If you selected Controlled Vocabulary as the License Term Type, select **Add value** for each item that will appear in the corresponding drop-down in the License Term tab of the license. Continue to add values for as many options as needed.

8. When you are done, select **Add and Close**. The term appears in the list of terms on the Manage License Terms page

**To edit a license term:**
Select a new option for the term in the **License Section** or **Display to Public** columns, or edit the value of the **Order in Section** column.

**To delete a term you added:**
Select **Delete** in the row actions list. You cannot delete the out-of-the-box terms.

---

**List of License Terms**

The following table lists the license terms and their descriptions:

<table>
<thead>
<tr>
<th>License Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessibility Compliance Indicator</td>
<td>An agreement that the data is provided in a form compliant with relevant accessibility (disabilities) legislation.</td>
</tr>
<tr>
<td>License Term</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>All Rights Reserved</td>
<td>A clause stating that all intellectual property rights not explicitly granted to the licensee are retained by the licensor.</td>
</tr>
<tr>
<td>Applicable Copyright Law</td>
<td>A clause that specifies the national copyright law agreed to in the contract.</td>
</tr>
<tr>
<td>Archiving Format</td>
<td>The format of the archival content.</td>
</tr>
<tr>
<td>Archiving Note</td>
<td>Additional information related to archiving rights, product, and format.</td>
</tr>
<tr>
<td>Archiving Right</td>
<td>The right to permanently retain an electronic copy of the licensed materials.</td>
</tr>
<tr>
<td>Authorized User Definition</td>
<td>The group of users allowed to use the Electronic Product, as defined in the contract.</td>
</tr>
<tr>
<td>Citation Requirement Detail</td>
<td>A specification of the required or recommended form of citation.</td>
</tr>
<tr>
<td>Clickwrap Modification Clause Indicator</td>
<td>A clause indicating that the negotiated agreement supersedes any click-through, click-wrap, other user agreement, or terms of use residing on the provider's server that might otherwise function as a contract of adhesion.</td>
</tr>
<tr>
<td>Completeness of Content Clause Indicator</td>
<td>The presence of a provision in the contract stating that the licensed electronic materials shall include all content found in the print equivalent.</td>
</tr>
<tr>
<td>Concurrency with Print Version Clause Indicator</td>
<td>The presence of a provision in the contract which states that the licensed materials will be available before, or no later than the print equivalent, and/or will be kept current.</td>
</tr>
<tr>
<td>Concurrent User</td>
<td>• The licensed number of concurrent users for a resource.</td>
</tr>
<tr>
<td></td>
<td>• The number of concurrent users if shared across a vendor interface, rather than for a specific resource.</td>
</tr>
<tr>
<td>Concurrent User Note</td>
<td>• A specific explanation of how users are allocated or shared if pooled or platform-based.</td>
</tr>
<tr>
<td></td>
<td>• Additional information about the number of concurrent users.</td>
</tr>
<tr>
<td>Confidentiality of Agreement</td>
<td>The presence or absence of clauses that specify or detail restrictions on the sharing of the terms of the license agreement.</td>
</tr>
<tr>
<td>Confidentiality of Agreement Note</td>
<td>Specific details about what aspects of the license are private.</td>
</tr>
<tr>
<td>Confidentiality of User Information Indicator</td>
<td>The requirement that user data should not be shared with third parties, reused, or resold without permission.</td>
</tr>
<tr>
<td>Consortial Agreement Indicator</td>
<td>Whether an acquisition falls under a multiparty agreement that uses the same license for all parties.</td>
</tr>
<tr>
<td>Content Warranty</td>
<td>A clause that guarantees a remedy to the licensee if the quantity or quality of material contained within the resource is materially diminished.</td>
</tr>
<tr>
<td>Course Pack Electronic</td>
<td>The right to use licensed materials in collections or compilations of materials assembled in an electronic format by faculty members for use by students in a class for purposes of instruction.</td>
</tr>
<tr>
<td>Course Pack Note</td>
<td>Information which qualifies a permissions statement on Course Packs.</td>
</tr>
<tr>
<td>License Term</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Course Pack Print</td>
<td>The right to use licensed materials in collections or compilations of materials assembled in a print format by faculty members for use by students in a class for purposes of instruction.</td>
</tr>
<tr>
<td>Course Reserve Electronic Copy</td>
<td>The right to make electronic copies of the licensed materials and store them on a secure network.</td>
</tr>
<tr>
<td>Course Reserve Note</td>
<td>Information which qualifies a permissions statement on Course Reserves.</td>
</tr>
<tr>
<td>Course Reserve Print</td>
<td>The right to make print copies of the licensed materials and place them in a controlled circulation area of the library for reserve reading in conjunction with specific courses of instruction.</td>
</tr>
<tr>
<td>Cure Period for Breach</td>
<td>The cure period for an alleged material breach.</td>
</tr>
<tr>
<td>Cure Period for Breach Unit of Measure</td>
<td>The time interval that measures the Cure Period for Breach.</td>
</tr>
<tr>
<td>Database Protection Override Clause</td>
<td>A clause that provides fair use protections within the context of assertions of database protection or additional proprietary rights related to database content not currently covered by U.S. copyright law.</td>
</tr>
<tr>
<td>Digital Copy</td>
<td>The right of the licensee and authorized users to download and digitally copy a reasonable portion of the licensed materials.</td>
</tr>
<tr>
<td>Digital Copy Note</td>
<td>Information which qualifies a permissions statement on Digital Copy.</td>
</tr>
<tr>
<td>Distance Education</td>
<td>The right to use licensed materials in distance education.</td>
</tr>
<tr>
<td>Distance Education Note</td>
<td>Information which qualifies a permissions statement on distance education.</td>
</tr>
<tr>
<td>Electronic Link</td>
<td>The right to link to the licensed material.</td>
</tr>
<tr>
<td>Electronic Link Term Note</td>
<td>Information which qualifies a permissions statement on Electronic Links.</td>
</tr>
<tr>
<td>Embargo Period</td>
<td>The amount of time by which content is intentionally delayed.</td>
</tr>
<tr>
<td>Fair Use Clause</td>
<td>A clause that affirms statutory fair use rights under U.S. copyright law (17 USC Section107), or that the agreement does not restrict or abrogate the rights of the licensee or its user community under copyright law.</td>
</tr>
<tr>
<td>Governing Jurisdiction</td>
<td>The venue or jurisdiction to be used in the event of an alleged breach of the agreement.</td>
</tr>
<tr>
<td>Governing Law</td>
<td>A clause specifying the governing law to be used in the event of an alleged breach of the agreement.</td>
</tr>
<tr>
<td>Indemnification by Licensee Clause</td>
<td>A clause by which the licensee agrees to indemnify the licensor against a legal claim, usually for a breach of agreement by the licensee.</td>
</tr>
<tr>
<td>Indemnification by Licensor Clause</td>
<td>A clause by which the licensor agrees to indemnify the licensee against a legal claim.</td>
</tr>
<tr>
<td>Indemnification Note</td>
<td>Additional information providing amplification of any nuances to the indemnification clauses.</td>
</tr>
<tr>
<td>Intellectual Property Warranty Indicator</td>
<td>A clause in which the licensor warrants that making the licensed materials available does not infringe upon the intellectual property rights of any third parties.</td>
</tr>
<tr>
<td>Interlibrary Loan Electronic</td>
<td>The right to provide the licensed materials by interlibrary loan by way of electronic copies.</td>
</tr>
<tr>
<td>Interlibrary Loan Note</td>
<td>Additional information related to interlibrary loan.</td>
</tr>
<tr>
<td>License Term</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Interlibrary Loan Print Or Fax</td>
<td>The right to provide the licensed materials by interlibrary loan by way of print copies or facsimile transmission.</td>
</tr>
<tr>
<td>Interlibrary Loan Record Keeping Required Indicator</td>
<td>The requirement to keep records of interlibrary loan activity and provide reports to the licensor at periodic intervals or upon request.</td>
</tr>
<tr>
<td>Interlibrary Loan Secure Electronic Transmission</td>
<td>The right to provide the licensed materials by interlibrary loan by way of secure electronic transmission.</td>
</tr>
<tr>
<td>License End Date Tickler</td>
<td>This field is not currently functional.</td>
</tr>
<tr>
<td>License Replaced By</td>
<td>The license agreement that succeeds a superseded agreement.</td>
</tr>
<tr>
<td>License Replaces</td>
<td>The license agreement which preceded the current agreement.</td>
</tr>
<tr>
<td>License Reviewer Note</td>
<td>Comments recorded by the license reviewer regarding the license.</td>
</tr>
<tr>
<td>Licensee Notice Period for Termination</td>
<td>The amount of advance notice required prior to contract termination by the Licensee.</td>
</tr>
<tr>
<td>Licensee Notice Period for Termination Unit of Measure</td>
<td>The time interval in which the Licensee Notice Period for Termination by the library is measured.</td>
</tr>
<tr>
<td>Licensee Termination Condition</td>
<td>The conditions that would allow a licensee to terminate acquisition during a contract period.</td>
</tr>
<tr>
<td>Licensee Termination Right Indicator</td>
<td>The ability of the licensee to terminate an acquisition during a contract period.</td>
</tr>
<tr>
<td>Licensor Notice Period for Termination</td>
<td>The amount of advance notice required prior to contract termination by the licensor.</td>
</tr>
<tr>
<td>Licensor Notice Period for Termination Unit of Measure</td>
<td>The time interval in which the Licensor Notice Period for Termination is measured.</td>
</tr>
<tr>
<td>Licensor Termination Condition</td>
<td>The conditions that would allow a Licensor to terminate an acquisition during a contract period.</td>
</tr>
<tr>
<td>Licensor Termination Right Indicator</td>
<td>The ability of a Licensor to terminate an acquisition during a contract period.</td>
</tr>
<tr>
<td>Local Authorized User Definition Indicator</td>
<td>The inclusion of an institution-specific preferred authorized user definition.</td>
</tr>
<tr>
<td>Maintenance Window</td>
<td>The recurring period of time reserved by the product provider for technical maintenance activities, during which online access may be unavailable.</td>
</tr>
<tr>
<td>Non-Renewal Notice Period</td>
<td>The amount of advance notice required prior to license renewal if the licensee does not wish to renew the subscription.</td>
</tr>
<tr>
<td>Non-Renewal Notice Period Unit of Measure</td>
<td>The time interval in which the Non-Renewal Notice Period is measured</td>
</tr>
<tr>
<td>License Term</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Other Use Restriction Note</td>
<td>Additional information about other use restrictions not adequately described elsewhere.</td>
</tr>
<tr>
<td>Other User Restriction Note</td>
<td>Additional information about other user restrictions not adequately described elsewhere.</td>
</tr>
<tr>
<td>Performance Warranty Indicator</td>
<td>Indicates whether a clause that requires a satisfactory level of online availability and/or response time is present.</td>
</tr>
<tr>
<td>Performance Warranty Uptime Guarantee</td>
<td>The specific percentage of up-time guaranteed for the product being licensed, and the context for that percentage.</td>
</tr>
<tr>
<td>Perpetual Access Holdings</td>
<td>The dates of coverage for which perpetual rights are available and agreed upon in the legal contract.</td>
</tr>
<tr>
<td>Perpetual Access Note</td>
<td>Additional information related to perpetual access.</td>
</tr>
<tr>
<td>Perpetual Access Right</td>
<td>The right to permanently access the licensed materials paid for during the period of the license agreement.</td>
</tr>
<tr>
<td>Pooled Concurrent Users</td>
<td>The number of concurrent users if shared across a consortium rather than within a specific institution.</td>
</tr>
<tr>
<td>Print Copy</td>
<td>The right of the licensee and authorized users to print a portion of the licensed materials.</td>
</tr>
<tr>
<td>Print Copy Note</td>
<td>Information which qualifies a permissions statement on Print Copy.</td>
</tr>
<tr>
<td>Remote Access</td>
<td>The right of an authorized user to gain access to an Electronic Product from an off-site location.</td>
</tr>
<tr>
<td>Renewal Type</td>
<td>The process by which the license is renewed by the licensee: automatically or by explicit request.</td>
</tr>
<tr>
<td>Scholarly Sharing</td>
<td>The right of authorized users and/or the licensee to transmit hard copy or an electronic copy of a portion of the licensed materials to a third party for personal, scholarly, educational, scientific or professional use.</td>
</tr>
<tr>
<td>Scholarly Sharing Note</td>
<td>Information which qualifies a permissions statement on Scholarly Sharing.</td>
</tr>
<tr>
<td>Termination Requirement</td>
<td>The obligation to take certain actions upon termination of the contract.</td>
</tr>
<tr>
<td>Termination Requirements Note</td>
<td>A clarification of the termination requirements and what certification of the requirement activities is necessary.</td>
</tr>
<tr>
<td>Termination Right Note</td>
<td>Additional information necessary to amplify any specifications of termination rights.</td>
</tr>
<tr>
<td>UCITA Override Clause Indicator</td>
<td>A clause that reflects the licensor's agreement to use U.S. state contract law in the event UCITA is ever passed and implemented in the specified governing law state.</td>
</tr>
<tr>
<td>Usage Data Set Up Status</td>
<td>The status of the library's arrangement to receive usage data for the product.</td>
</tr>
<tr>
<td>Walk-In User Term Note</td>
<td>Information which qualifies the status or permitted actions of Walk-In Users.</td>
</tr>
</tbody>
</table>
Configuring License Storage Locations

To configure license storage locations, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can define locations where license information is physically stored. These options appear wherever the License Location drop-down appears, such as when Adding a License.

You configure license storage locations on the License Storage Location Code Table page (Configuration Menu > Acquisitions > Licenses > License Storage Locations). For more information about code tables, see Code Tables.

License Storage Location Code Table Page

You can add, edit, or delete locations. You can enable or disable locations, change their order, and set the default location.
Configuring License Review Statuses

To configure the order of sections, you must have one of the following roles:

- Acquisitions Administrator
- General System Administrator

You can define the license review statuses that are available to select when creating or editing licenses. For more information, see Managing Licenses and Amendments.

You configure license review statuses on the License Review Status code table (Configuration Menu > Acquisitions > Licenses > License Review Status). For more information about code tables, see Code Tables.

License Review Status Code Table Page

You can add, edit, or delete a review status. You can enable or disable a status, change their order, and select the default status.
Viewing User-Created License Terms that Appear in Primo

The Discovery Interface Labels Custom code table (Configuration Menu > Acquisitions > Licenses > Discovery Interface Labels Customized) displays all customer-added license terms. For more information about code tables, see Code Tables.

This read-only table enables you to conveniently view, in one place, all of the licenses that appear in Primo and their display names.

See Managing License Terms for how to add or remove these terms; this page cannot be edited. For other labels that appear in Primo, see Configuring Service Labels in the Discovery Interface.
Configuring License Term Controlled Vocabulary Values

To configure license terms, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can add, delete, and modify values for controlled vocabulary license terms that are defined in the Manage License Term page. These values appear as the drop-down values for a controlled vocabulary license term in the License Terms tab on the License Term Details page. See Managing Licenses Terms.

You manage controlled vocabulary license terms values on the License Term Controlled Vocabulary page (Configuration Menu > Acquisitions > Licenses > Manage License Terms).

To add a controlled vocabulary value:

1. Select Add Row. The following pop-up box appears:

   ![Add License Term Dialog Box](image)

   **Add License Term Dialog Box**

2. Enter the license term's unique Code.

3. Enter a value that will appear in the drop-down list for this license term.
4. Select **Add Row**. When you are done adding values, select **Save**.
Configuring Other Settings (Acquisitions)

To configure other settings, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can customize additional settings on the Customer Parameters mapping table (Configuration Menu > Acquisitions > General > Other Settings). For more information about mapping tables, see Mapping Tables.

Customer Parameters Mapping Table Page

You can modify or restore any parameter. Remember to select Save to store your changes. The following table describes the parameters available on the Customer Parameters Mapping Table page.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>acq_distribute_changes_last_run</td>
<td>The last date that the Distribute Network Acquisition Changes to Members job ran to distribute vendor information. The job copies all vendors that have been added to the Network Zone since this date. For more information, see Sharing Vendor Information in a Network Zone. The format is YYYYMMDD (or YYYYMMDD_hhmmss).</td>
</tr>
<tr>
<td>acq_distribute_changes_last_run_license</td>
<td>The last date that the Distribute Network Acquisition Changes to Members job ran to distribute license information. The job copies all centrally managed licenses that have been added to the Network Zone since this date. For more information, see Sharing Vendor Information in a Network Zone. The format is YYYYMMDD (or YYYYMMDD_hhmmss).</td>
</tr>
<tr>
<td>acq_distribution_job</td>
<td>Whether the Distribute Network Acquisition Changes to Members job is active (true) or not (false). For more information, see Sharing Vendor Information in a Network Zone.</td>
</tr>
<tr>
<td>acq_use_vendor_account_email</td>
<td>Whether to send vendor-related emails to the email defined for the vendor account (true) or for the vendor (false). The default is false.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>acquisition_accrual_mode</td>
<td>Whether the institution can work with accrual accounting (true) or not (false). See <a href="#">Working with Accrual Accounting</a>.</td>
</tr>
<tr>
<td>assertion_over_po_line_price</td>
<td>Sends the PO line for review if the specified price is reached and the <strong>AssertionCode</strong> in the Purchasing Review Rules is set to <strong>Price limit reached</strong>. Leave empty or enter a value 0 or higher, with up to two decimal points. The default is 10000.</td>
</tr>
<tr>
<td>auto_claim</td>
<td>Whether a claims notification is sent automatically by email to the vendor when a one-time PO line is sent to the claims task list (Y to send the notification, N or empty otherwise). If the vendor uses EDI, Alma will send an EDI claim instead of a claim letter.</td>
</tr>
<tr>
<td>auto_claim_co</td>
<td>Whether a claims notification is sent automatically to the vendor when a continuous PO line is sent to the claims task list (Y to send the notification, N or empty otherwise). If the vendor uses EDI, Alma will send an EDI claim instead of a claim letter.</td>
</tr>
<tr>
<td>auto_claim_electronic</td>
<td>For future use</td>
</tr>
<tr>
<td>claim_continuous_item_level</td>
<td>When a claim letter is sent for a given month, and the item is never received, if the following month's item also goes into claim, a claim letter can be sent with details for both months. To enable this option, set the parameter to true. Default is false. See <a href="#">Processing Claims</a>.</td>
</tr>
<tr>
<td>copy_POL_price_to_item</td>
<td>Whether the list price from the PO line is copied to the inventory price field in the item for physical one time orders, when the PO line price is changed. Set this parameter to true to copy the price. Additionally, when set to true and the PO line is saved, if the currency is not the local currency, the total is recalculated for the item. The parameter defaults to false, which does not copy the price to the item.</td>
</tr>
<tr>
<td>expended_from_fund_default</td>
<td>The default value of whether VAT is expended from the invoice line’s fund (true or false).</td>
</tr>
<tr>
<td>exportPrepaidInv</td>
<td>Whether the Export to ERP check box is displayed when you select Prepaid on the Invoice Details page (true or false).</td>
</tr>
<tr>
<td>handle_invoice_payment</td>
<td>Whether invoices are sent to the Waiting for Payment Invoices page to await automatic or manual handling (true), or closed automatically when they are exported to the ERP system (false). For details, see <a href="#">Working with Invoices Waiting for Payment</a>.</td>
</tr>
<tr>
<td>invoice_allow_vat_in_line_level</td>
<td>Whether VAT can be configured for an invoice on the invoice line level (true) or not (false).</td>
</tr>
<tr>
<td>invoice_high_total_price</td>
<td>Invoices received above this price are assigned the assertion code <strong>High total price</strong>. Alma sends the invoice for review/approval if this price is reached and the AssertionCode in the Invoice Review/Approval Rules is set to <strong>High total price</strong>. The value is assumed to be in the system's default currency (but see invoice_high_total_use_currency). In the rare case that this value is less than 1, enter a leading 0. For example, 0.44, not .44.</td>
</tr>
<tr>
<td>invoice_high_total_use</td>
<td>When set to true, the invoice value is first converted to the institution's local currency before it is compared to invoice_high_total_price.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>currency</td>
<td>For example, assume the local currency is GBP, <code>invoice_high_total_price</code> is set to 2500, and the invoice is 2600 JPY (around 19 GBP). If this parameter is false, then the assertion is raised, since 2600 &gt; 2500. If this parameter is true, then the assertion is not raised, since 19 &lt; 2500. Alma sends the invoice for review/approval if this price is reached and the <code>AssertionCode</code> in the Invoice Review/Approval Rules is set to <strong>High total price use currency</strong>.</td>
</tr>
<tr>
<td>invoice_not_unique</td>
<td>Whether you can save non-unique invoice numbers that have the same vendor in the inventory database (true) or not (false). When true, this enables you to uniquely identify records with the same invoice number and the same vendor. See <a href="#">Creating Invoices</a>.</td>
</tr>
<tr>
<td>invoice_prefix</td>
<td>Not in use.</td>
</tr>
<tr>
<td>invoice_skip_erp</td>
<td>Whether the invoice workflow skips the step where the invoice is Waiting for Payment (true) or not (false). For details on how this setting affects the invoicing workflow, see step 2 in <a href="#">Invoicing Workflow</a>.</td>
</tr>
<tr>
<td>Invoice_split_additional_charges</td>
<td>When set to true, the additional charges will be split and added over all existing invoice lines. When set to false, an additional invoice line is created (on top of the existing lines) which carries the additional charges.</td>
</tr>
<tr>
<td>note</td>
<td>Any additional charges that are not found and enabled in the Invoice Line Types code table appear as <strong>Overhead</strong> type invoice lines. In addition, when set to true, the Invoice Line Types code table appears as a configuration option on the Acquisitions Configuration page. When set to false, the option does not appear.</td>
</tr>
<tr>
<td>invoice_subscription_overlap</td>
<td>Whether the <strong>Check subscription date overlap</strong> check box is displayed on the Invoice Line Details page (true or false). If this parameter is set to true and the check box is selected, Alma checks all invoice lines associated with the PO line to determine whether there is an overlap of invoice dates for continuous subscriptions and if there is, issues an alert to this effect.</td>
</tr>
<tr>
<td>invoice_use_pro_rata</td>
<td>Whether the <strong>Use pro rata</strong> setting is selected by default when creating new invoices (true or false).</td>
</tr>
<tr>
<td>no_e-task_on_close_po_line</td>
<td>Whether a task is created when an electronic PO line is closed (the task reminds the user to deactivate the resource). true indicates that the task is NOT created; false indicates that the task is created. The default is false.</td>
</tr>
<tr>
<td>po_line_calc_co_next_step_on_receive</td>
<td>Set to true to calculate a PO line's next step and put the item in transit, if needed, when receiving a continuous PO line for other departments. When false, which is the default, the item will not be put into transit when receiving a continuous PO line for other departments.</td>
</tr>
<tr>
<td>po_line_prefix</td>
<td>The prefix to be used for all PO lines. The default is POL-.</td>
</tr>
<tr>
<td>po_line_remove_interested_users</td>
<td>Set to true to indicate that all interested users on closed and canceled PO lines should be deleted when the weekly PO Line – Delete interested users job runs. See <a href="#">Manually Creating a PO Line</a>.</td>
</tr>
<tr>
<td>po_line_send_notification_to_vendor_on_renewal</td>
<td>Whether an email should be sent to vendors when a subscription is renewed. Note that the vendor's preferred email address is used (true or false). See <a href="#">Renewal Workflow</a>.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>po_packed_by_fund</td>
<td>Whether PO lines are automatically packaged into POs according to funds (true or false). If set to true, institutions working with functional funds are able to locate all the POs associated with a specific fund and manage PO approval more efficiently. For more information, see Packaging PO Lines into a PO.</td>
</tr>
<tr>
<td>po_prefix</td>
<td>The prefix to use for all POs. The default is PO-.</td>
</tr>
<tr>
<td>pol_handle_childless_bib</td>
<td>Defines how an itemless bibliographic record will be handled when the PO line is canceled and the item and holdings are deleted. Possible options are:</td>
</tr>
<tr>
<td></td>
<td>• Manual - When cancelling a PO line, a pop-up window is displayed to the operator to select which action to take.</td>
</tr>
<tr>
<td></td>
<td>• Delete - The itemless bibliographic record is automatically deleted.</td>
</tr>
<tr>
<td></td>
<td>• Suppress - The itemless bibliographic record is suppressed from publishing.</td>
</tr>
<tr>
<td></td>
<td>• Do Nothing - The bibliographic record is not deleted. This is the default behavior.</td>
</tr>
<tr>
<td></td>
<td>See Canceling PO Lines.</td>
</tr>
<tr>
<td>purchase_request_import_profile</td>
<td>Stores the name of the import profile to be used for matching purchase requests. Leaving this parameter blank means the purchase request matching process will use the default match of ISBN/ISSN numbers. For more information, see Creating a Purchase Request.</td>
</tr>
<tr>
<td>release_remaining_encumbrance_for_edi</td>
<td>Whether encumbrances are released for continuous order PO lines in invoices that are created using EDI (true or false).</td>
</tr>
<tr>
<td>trial_notification_before_start_date</td>
<td>Not in use. See the job Trials – Start and Notify Participants in Viewing Scheduled Jobs.</td>
</tr>
<tr>
<td>vat_percent_default</td>
<td>The default percentage of VAT in the institution. The default is initially 0.</td>
</tr>
<tr>
<td>view_holding_in_receiving</td>
<td>Whether holdings information is displayed when viewing receiving items (true or false).</td>
</tr>
</tbody>
</table>
Configuring Currencies

To configure currencies, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can configure the currencies supported by the institution on the Currency Subset mapping table (Configuration Menu > Acquisitions > General > Currency Subset). For more information about mapping tables, see Mapping Tables.

You cannot enable or disable currencies on this page; all defined currencies appear in the relevant locations in Alma. You can add, edit, or delete currencies. When you add a currency, you must select one from the pre-defined list known to Alma. To select a default currency, select True for one currency and False for all other currencies.
Configuring Fund and Ledger Fiscal Periods

To configure fund and ledger fiscal periods, you must have one of the following roles:

- Acquisitions Administrator
- General System Administrator

A fiscal period is the financial year to which a fund or ledger applies. At the end of each period, you must roll over ledgers and PO lines to the next period. See Fiscal Period Closure.

You view and edit fiscal periods on the Fund And Ledger Fiscal Period Table mapping table (Configuration Menu > Acquisitions > General > Fund and Ledger Fiscal Period). For more information about mapping tables, see Mapping Tables.

On this page you can edit only the description and status of a fiscal period. The statuses Draft and Closed are identical to the status Inactive. When creating a new ledger, only Active fiscal periods are available for the ledger. The status does not affect whether a rollover job can be run on the fiscal period (see Rolling Over Ledgers).

You cannot activate or deactivate fiscal periods using the sliders, and you cannot add or delete fiscal periods. These form elements in this table have no effect.

Note

Fund and ledger fiscal periods cannot be added using this page. They appear automatically after ledger and PO line rollovers are run (see Rolling Over Ledgers and Rolling Over PO Lines).
Configuring Receiving Departmental Validations

To configure receiving departmental validations, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can activate validation checks for barcodes and brief bibliographic records of physical items. These checks are processed when a user exits the Received Items List. When activated, a dialog box with a warning message appears if a barcode is missing or a record is brief. See Receiving Physical Material. (For more information regarding brief records, see Working with Brief Record Levels.)

You activate receiving department validation checks on the Receiving Department Validations mapping table (Configuration Menu > Acquisitions > General > Receiving Department Validations). For more information about mapping tables, see Mapping Tables.

Receiving Department Validations Mapping Table

To activate or deactivate a validation, select No or Yes in the Active column and select Save. The slider in the Enabled column has no effect. The validation options are:

- Barcode - Validate if the resource has a barcode.
- Brief - Validate if the resource's bibliographic record is not brief.
Configuring Fund Types

To configure fund types, you must have the following role:

- Acquisitions Administrator
- General System Administrator

Fund types are for informational purposes only. You can define the fund types that you want to appear in the Summary Details page (the Funds tab) of funds. See Adding a Fund.

You configure fund types on the Fund Type code table (Configuration Menu > Acquisitions > General > Fund Types). For more information about code tables, see Code Tables.

You can add, edit, or delete fund types. You can enable or disable types, change their order, or set a fund type as the default.

Note

The ResourceSharing fund type is required for assigning funds to a resource sharing borrowing request; see Borrowing Requests Associated with Funds.
Configuring Acquisition Jobs

To configure an acquisitions job, you must have the following role:

- Acquisitions Administrator
- General System Administrator

You can configure the following acquisition-related jobs on the Acquisition Jobs Configuration page (Configuration Menu > Acquisitions > General > Acquisitions Jobs Configuration):

- **PO Line - Packaging job** - Packages PO lines that are waiting for automatic packaging into purchase order (POs) that may be sent to the vendor. For details on PO line packaging, see Packaging PO Lines into a PO. For information on configuring the job, see below.

- **SUSHI Harvesting job** - Harvests all COUNTER data from all active SUSHI accounts. For information on this job, and how to configure it on this page, see Managing SUSHI Harvesting.

![Acquisition Jobs Configuration Page](image)

To configure the parameters for the PO Line Package job:

1. Open the Acquisitions Jobs Configuration page.
2. For **Status**, select **Active** to make the job active or select **Inactive** to make the job inactive.
3. For **PO Line Package job schedule**, select the time that you want the job to run. For more information on jobs and scheduling, see Overview of Jobs.
4. To run the job immediately, select **Run Now**.
5. In the **PO Line continuous limit** field, enter the maximum number of continuous PO lines that can be packaged together in a PO. Permitted values are between 1-200.
6. In the **PO line one time limit** field, enter the maximum number of one-time PO lines that can be packaged together in a PO. Permitted values are between 1-200.
7. Select **Package PO line by fund** to package PO lines according to fund in a PO.
8. When you are done, select **Save**.
Configuring Purchase Request Reject Reasons

You can configure the list of reasons to reject a purchase patron request. For more information about purchase requests, see Purchase Requests.

You can configure the rejection reasons on the Purchase Request Reject Reasons code table (Configuration Menu > Acquisitions > General > Purchase Request Reject Reasons). For more information about code tables, see Code Tables.

Purchase Request Reject Reasons Code Table

You can add, edit, and delete reasons from the list. You can enable or disable a reason, change their order, or select one as the default.
Configuring Legal Deposit Report Paths

You can configure the paths to the Legal Deposit serial Analytics reports that you send to vendors. For information on these reports, see Working With Legal Deposits. These paths appear in a drop-down list when configuring the job that sends these reports to the relevant vendors; see Legal Deposit Annual Receipt Task in Running Manual Jobs on Defined Sets.

You configure these paths using the Legal Deposit Reports code table (Configuration Menu > Acquisitions > General > Legal Deposit Reports). For more information about code tables, see Code Tables.

Legal Deposit Reports Code Table

You can add, edit, or delete a report path. You can activate or deactivate a path, change their order, and select a path as the default.

A report code must be the Analytics path to the report + the report name. For example: /shared/Alma University/reports/acquisitions/Report of arrived items (where /shared/Alma University/reports/acquisitions/ is the path and Report of arrived items is the report name). The description is the name of the report, as it appears in the drop-down box when configuring the Legal Deposit job.
Configuring Multiple Choice Survey Questions

To configure an acquisitions job, you must have the following role:

- Acquisitions Administrator
- Trial Manager

You can manage the values of the Multi choice or Single choice questions for surveys within the survey or from the mapping table, Survey Question Multiple Choice (Configuration Menu > Acquisitions > General > Survey Question Multiple Choice). For more information about code tables, see Code Tables.

Survey Question Multiple Choice Code Table

You can add or delete reasons from the list.
Configuring EDI Vendor Note Fields

To configure acquisition methods, you must have one of the following roles:

- Acquisitions Administrator
- General System Administrator

You can configure the descriptions for the vendor note fields that are sent to the EDI vendors in the ORDERS EDI file.

These actions are performed on the EDI Vendor Note Fields mapping table (Configuration Menu > Acquisitions > Purchase Orders > EDI Vendor Note Fields). By default, all of the note fields are enabled. To disable a note field or change the description, select Customize from the row actions menu.

EDI Vendor Note Fields

Below is a list of the vendor note fields, with their default description and prefix information.

<table>
<thead>
<tr>
<th>Code</th>
<th>Field Name</th>
<th>Prefix</th>
</tr>
</thead>
<tbody>
<tr>
<td>fund_description</td>
<td>Fund description</td>
<td></td>
</tr>
<tr>
<td>line_type_name</td>
<td>PO line type</td>
<td>Prefix of the field PO Line type. For example, <strong>PO Line Type:</strong></td>
</tr>
<tr>
<td>receiving_note</td>
<td>Receiving note</td>
<td>Prefix of the field Receiving note. For example, <strong>Receiving note:</strong></td>
</tr>
<tr>
<td>reporting_code</td>
<td>Reporting code</td>
<td>Prefix of the field Reporting Code. For example, <strong>Reporting Code:</strong></td>
</tr>
<tr>
<td>rush</td>
<td>Rush</td>
<td></td>
</tr>
<tr>
<td>secondary_reporting_code</td>
<td>Secondary reporting code</td>
<td></td>
</tr>
<tr>
<td>tertiary_reporting_code</td>
<td>Tertiary reporting code</td>
<td></td>
</tr>
</tbody>
</table>

The fields are available to select on the EDI Information tab of the Vendor page. See Configuring EDI for a Vendor.
Managing Access Models

To configure license storage locations, you must have the following role:

- Acquisitions Administrator
- General System Administrator

The access model describes the resource availability for simultaneous use. The Public Access Model defines the message that displays to the user if a user attempts to access a resource in Primo that is already in use.

You configure the display description in the Public Access Model and add new access models on the Manage Access Model page (Configuration Menu > Acquisitions > Licenses > Access Model). For more information about code tables, see Code Tables.

You can add, edit, or delete access models.

For more information on access models, see Real-Time Ordering.
Configuring Purchase Request Material Types

You can configure the material types on the Purchase Request Material Types code table (Configuration Menu > Acquisitions > Purchase Request > Purchase Request Material Types). For more information about code tables, see Code Tables.

Purchase Request Material Types Code Table

You can define which purchase request material type is the default and reorder the material types.

For more information about purchase requests, see Purchase Requests.
Getting the Most Out of Alma

Documents

- Getting the Most from Alma - Managing Combined Print and Electronic Journal Subscriptions
- Getting the Most from Alma - Patron Driven Acquisitions
- Getting the Most from Alma - Trials and Evaluations