Managing Acquisitions Workflows

Carolyn Sprague | Training Consultant
Amanda Robertson | Implementation Consultant

Introductions

- Carolyn Sprague is a Training Consultant on the Ex Libris Global Education team. Carolyn has worked at Ex Libris for 9 years and was previously a Primo implementation consultant. Carolyn holds an MLS from Simmons College in Boston.
- Amanda Robertson has four years of experience supporting and implementing Alma. Prior to joining Ex Libris, she worked in special libraries and knowledge management. Amanda holds an MLS from the University of Wisconsin.

Objectives and Target Audience

- Brief Session Description:
  This training session will introduce strategies for handling ordering, receiving, and invoicing issues for various acquisitions scenarios.
- Session Objective(s)
  - By the end of this session, you will know how to handle common acquisitions scenarios, including:
    - Handling Purchase Order Line tasks
    - Gaining efficiencies during receiving processes
    - Managing invoices more efficiently
- Session Target Audience:
  - Library Staff who handle acquisitions/purchasing
  - Library Staff who handle invoicing tasks
  - Library Staff who receive resources.

Functional User Group / Roles

- The tasks covered in this presentation require the following roles:
  - **Purchasing Managers** and **Operators** may create PO lines.
  - **Operators** with a **Receiving role** may receive items.
  - **Invoicing Managers** and **Operators** may create invoices.

Agenda

1. Introduction
2. Purchasing Scenarios
3. Receiving Scenarios
4. Invoicing Scenarios
5. Documentation, Support Resources and Survey

Introduction: Background for this Session
Handling Ongoing Acquisitions Tasks

- From time to time, it will be necessary to handle one-off tasks related to the following areas:
  - Order/Purchase
  - Receive
  - Invoice

- This session will cover a number of scenarios that may fall outside of routine acquisitions tasks. These tips and tricks will come in handy for anyone working daily with ordering, receiving, and invoicing.

Changing Vendor on a Submitted Order

Scenario: Change the vendor on submitted orders

Use Case – Why the need to change the vendor?

- Item may be out of stock from the original vendor - so you want to update order with an alternate vendor (without having to recreate the order)
- The vendor on the order is a subsidiary of another vendor - and you want to update the details
- The vendor on the order may have been acquired by another vendor and you want to update the details.

Changing Vendor on a Purchase Order

Option 1:
- Acquisitions menu > Advanced Tools > Change Vendor on Order. Click Add Job.
- Select specific PO or leave blank to change all POs with the source vendor.

Option 2:
- Edit a POL in the following status: Sent/Waiting for Renewal / Waiting for Invoice
- In the dropdown next to the Go button, choose Replace (Only) Vendor
- Click Go
- Choose New Vendor and Click Change Vendor in Order

Replace Only Vendor

- Edit a POL in the following status: Sent/Waiting for Renewal / Waiting for Invoice
## Associating POLs

**Use Case: Why Associate multiple POLs together?**

- When managing a standing order—have one main PO Line for the subscription (associate it with the fund)
- For each item received, a new POL is created per item which can be associated back to the main PO Line.

### Main Subscription w/ fund

- **POL - 55567**

### Individual Item

- **Jan 2017**
- **Feb 2017**

---

## Hands On Exercise

**Create a POL associated to an existing POL**

- Do a repository search for a known item
- Select Order
- When creating the POL, click the Additional section
- In the Associated POL box, click the magnifying glass to search for and choose the POL
- Select Save and Continue on the POL
Purchasing: Ordering Multiple Copies

Ordering Multiple Copies

- Ordering scenario: Order multiple copies for different locations
- From PO line > **Ordered Items** section > use Quick Add for additional copies and locations

- Update **Quantity for Pricing** field to reflect multiple copies

Purchasing: Order Not Sent

Resolving and Order Stuck in Review

- Scenario: Order stays in review with an error message stating: order sending failed

  ![Resolving and Order Stuck in Review](image)

  - Edit the Vendor Record (via Actions) or Click on the Vendor Code to open.
  - Under the Contact Information Tab – Add Email Address

Order Not Sent – Updating Vendor Email
Receiving: POL is not on Receiving Bench.

- Scenario: A title that arrived at the library cannot be located on the receiving workbench
- This can occur if there are no holdings associated with the PO

Purchase Order Line is not in Receiving Bench

- Scenario: A title that arrived at the library cannot be located on the receiving workbench
- This can occur if there are no holdings associated with the PO

Receiving: Avoid Transits in Receiving

- Scenario: A received PO cannot be located on the receiving workbench
  - Search for the title in the repository search
  - Click on the Holdings Link under the title
  - Select Actions > Associate a PO, and associate the received PO with the holdings

Cannot Locate POL in Receiving

- Scenario: A received PO cannot be located on the receiving workbench
  - Search for the title in the repository search
  - Click on the Holdings Link under the title
  - Select Actions > Associate a PO, and associate the received PO with the holdings

Avoiding Transits in Receiving

- Verify the name and existence of an Acquisition Technical Services work order type

Avoiding Transits in Receiving

- Configure a circulation desk as the acquisitions department for a library

- Verify the name and existence of an Acquisition Technical Services work order type

Main Library Acquisitions/Receiving, Main Circulate
Avoiding Transits in Receiving

- Receive items while currently at this circulation desk

Hands-on Application/Exercises

Hands On Exercise – Configure Circulation Desk as Acquisitions

- Go to Alma > Administration > General Configuration > Configuration Menu > Work Order Types
  - Verify the name and existence of an Acquisition Technical Services work order type
  - Select the Fulfillment Configuration Menu, and choose a library
  - Select Circulation Desks
  - Select Actions > Edit on a desk, and select the work order types tab
  - Select Add Work Order
  - Choose the acquisitions work order type
  - Choose the number of days, and select Add and Close, the Save
  - Receive items while currently at this Circulation Desk

Invoicing: Data Differs in PO and Invoice

- Scenario: Data was changed in POL after invoicing was completed
  - Information only transfers from the POL/PO to the invoice at the point of order and
  - If information, i.e. fund or reporting code, are changed in the POL, they must also be changed in the invoice and vice versa

Invoicing: Invoices can’t be cleared after Fiscal Period Close
Unable to Clear Invoices After FPC

To solve this issue, add a grace period to the previous year:

1. Go to Alma > Acquisitions > Acquisitions Infrastructure > Funds and Ledgers
2. Choose the Fund from which the invoice will be paid
3. Click the Edit link to open the fund

1. Scroll to the bottom of the Summary Details page for the fund and click on the + sign to Expand Rules
2. Edit the Grace Period, and Save (30, 60, 90 days)

Invoices can now be closed

Next Steps and Support Resources

• Include documentation links relative to the topic:
  • Invoicing Workflows
  • Purchasing Workflows
  • Receiving Physical Material

• Additional support resources within the ExLibris Ecosystem:
  • Idea Exchange
  • System Status Pages: Single Tenant ENV / Multi-Tenant ENV
  • Developer Network

  • Technical Seminar Presentations
    (located in the Cross-Product section of the CKC)

Q & A

Any Questions?

Session Survey Evaluation

Please use the following link https://www.surveymonkey.com/r/techsem2017 to provide feedback on your sessions.
THANK YOU