Create the POL

Getting Started:
Once you have found the record in Alma, click on "Order."

If the record does not exist in Alma, export the best possible record from OCLC.

If a record can not be located in OCLC, ask Jackie to create a brief record in Alma for ordering purposes.

If you do not see Order, click on the (...) dots to find the option. Clicking "Order" will start the process.

POL Type Screen

Select the appropriate Purchase Type. Alma remembers your most recent selections, so you may have to search to find a specific type.

- PO Line Owner will be:
  - Bartle Library for print and physical orders *except for* Special Collections: All items purchased for the Special Locations location - including Faculty Archives; Local History.
- Generate barcode using sequence: keep at default
- Assign inventory manually: **Leave blank** so that Alma will create holdings and items automatically.

Select the "Create PO Line" button at the top of the screen.

POL Details Screen

This opens on the "Summary" tab.

- ORDERED ITEMS: All newly ordered items should be in location MORD. *Final locations will be adjusted during the cataloging process.*

- VENDOR INFORMATION: Materials Supplier: search for vendor by name or code. Use the “List” function to search all our active vendors by Name, Code, Keyword, Etc.

  The Vendor will be who *we pay*; generally vendors listed by name are in the NYS Payment system. Any order that is not being paid to a vendor listed in the NYS Payment system goes under “DIRECT” and the vendor information is listed in the NOTE tab of the order.

- PRICING: Actual price is preferred, but it is acceptable to use an estimate here if necessary.

- FUNDING: Click on “Add Funds.” It will always search and display only active funds. If an item is being split between funds, adjust the percent as necessary. Select the “Add Fund” button when done.

- POL DETAILS: Identify the Acquisition Method.

  - *Purchase at Vendor System* (Default): firm orders (e.g., Amazon Web site, GOBI, ebrary). Use the POL number given when asked for an order number.

  - *Approval Plan:* Used for all Approval purchases

  - Material Type: Change as needed

  - Reporting Codes

    Secondary: select Reserves if it is indicated the item is being used for reserves but it is not being ordered from RESERVES fund

    Select PHARMACY for any PHARMACY order.

Save the Order

- Order Now: the order is completed in both Alma and manually through an external vendor system (i.e. order has been placed through Amazon)

- Save: the order information is complete in Alma, but an order with the vendor has not yet been placed. This order will be found in your task list as "In Review."

  Allows for edits and changes before the order is sent.

- Save and Continue: Use if you are batching orders   See *Working with POs* for more information.

  All manually created orders should be finished with "ORDER NOW" before the item is received.

Related Documentation:

ExLibris: Manually Creating a PO Line:
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/020Creating_PO_Lines/030Manually_Creating_a_PO_Line