Purchase Orders, Lines and Owners

- **Purchase Order Line (POL) Owner**
- **Purchase Order Line (POL)**
- **Purchase Order (PO)**
  - Common Values Needed for Packaging POLs

### Quick Definitions

**Purchase Order Line Owner**: The unit/library responsible for creation of the order; it is also the unit most likely to receive and pay for the item, though there are some exceptions.

**Purchase Order Line (POL)**: An individual order which includes all the details of the order.

**Purchase Order (PO)**: What is sent to the vendor; a Purchase order could include one or multiple purchase order lines (POLs).

### Purchase Order Line (POL) Owner

- In Alma, the POL owner is defined as a **Library**, so the list of available POL owners are in the list of Libraries.
- The POL owner controls the ship to and bill to addresses on vendor communication.

Aleph Order units were migrated into Alma's list of Libraries (see *Acquisitions and Serials Data Mapping Guide*).

In some cases, there was a one to one ratio for this migration. For example, the Aleph order unit for Schlesinger (SCH01) orders, receives and pays only for Schlesinger: therefore the corresponding POL owner in Alma for Schlesinger orders will be simply Schlesinger Library.

In other cases, there may have been multiple order units for one library: such as Aleph order units for Widener Middle East, Widener Judaica, Widener Modern Greek, etc which represent different units with separate bill to and ship to addresses. In these cases, there are separate POL owners for each:

A third scenario is that of the Shared Service unit ITS (Information and Technical Services), which orders for a number of libraries. This means that the ship-to and bill-to addresses for orders are not those of the libraries themselves, but rather the ITS facility.

In this case, we have created POL owners that represent three separate ITS Units, as shown below:

### Purchase Order Line (POL)

To create an order in Alma, we first create a **Purchase Order Line** or **POL**. This is similar to a single line on an invoice.

The **Purchase Order Line** represents the details of a single order, including:

- Order type
- Material format
- Price
- Currency
- Fund
It also includes historical information and vendor communication.

**Purchase Order (PO)**

A Purchase order represents what is sent to the vendor as the final stage of the purchasing workflow.

The Purchase order is created from a Purchase order line when that POL is **ordered** or **packaged**.

POs can contain one or multiple POLs and can be **packaged manually** or **automatically**. For more detailed information, see Packaging and Sending a Purchase Order.

**Common Values Needed for Packaging POLs**

POL values that have to be in common for Packaging:

- Vendor account
- Owner
- Currency
- Continuity – One-time/continuous
- Acquisition method
- Source type (a value in the POL/Additional info section): the way the POL was created (either Manual entry or Import EOD)