Finance Quick Start Guide

This guide is designed as a launch point for common workflows related to Finance tasks. If you cannot find needed information elsewhere on the Alma section of the LTS Staff Documentation wiki or if you need additional assistance with Alma, please submit an Alma Support Ticket.

General

- Finance - Major Differences from Aleph

Vendor Maintenance

- General Information
  - ALMA Vendor Request Form.xlsx (Excel doc)
- Vendor Account records
  - Vendor Account record list
  - Vendor record details
  - Selecting a vendor during the POL creation process
  - Selecting a vendor during the Invoice creation process

Fund and Ledger Maintenance

- General Information
  - Overview of Fund and Ledger Structure
  - List of FY19 Ledgers, Summary Funds, and Allocated Funds

Invoice Approval

- General Background
- Invoice Life Cycle
- Waiting for Approval Invoices
- Auditing Invoice Data
- Invoices with Errors
- Alternative Workflows