Approving and Sending PO’s

To approve and send PO’s you must have the following role:

Purchasing Manger role

After PO lines are packaged into a PO and the PO is reviewed and saved using

Save and Continue, if the approval rules pre-configured by Ex Libris require approval for POs, the PO is sent for approval. You approve Pos on the Approve Orders page.

Acquisitions>Purchase Order>Approve

Note: see [Packaging PO Lines in a PO](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/020Acquisitions/050Purchasing/Working_with_POs_and_PO_Lines/Packaging_PO_Lines_into_a_PO#:~:text=PO%20lines%20can%20be%20included,acquisition%20method%20and%20source%20type.)

Approve Orders Page

You can also view the page by selecting the task Orders Lines-Approval in the Tasks List in the persistent menu – See [Tasks in the Tasks List](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/010Getting_Started/050Alma_User_Interface_%E2%80%93_General_Information/The_Alma_User_Interface#Tasks_in_the_Task_List)

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:

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
* Shipping information

The available shipping methods are configured by a code table.

See [Configuring Shipping Methods](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/020Acquisitions/040Configuring_Acquisitions/040Configuring_Shipping_Methods#:~:text=Shipping%20methods%20can%20be%20added,Purchase%20Orders%20%3E%20Shipping%20Method).). This page describes the approval of purchase orders (POs) in Alma, including resending and deleting POs. For a list of links to pages with instructions for purchasing in Alma including creating PO Lines, renewals, working with vendors, etc. see [Purchasing](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/020Acquisitions/050Purchasing/010_Purchasing_in_Alma/Purchasing_Workflow). For an overview of the full end to end purchasing workflow see [Purchasing Workflow](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/020Acquisitions/050Purchasing/010_Purchasing_in_Alma/Purchasing_Workflow). For an overview of working with acquisitions in Alma including links to relevant sections such as Infrastructure, Invoicing, Configuration, etc., see [Introduction to Acquisitions](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/020Acquisitions/010Introduction_to_Acquisitions).

Note:

Approve Orders Page

* 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](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/090Integrations_with_External_Systems/020Acquisitions/010Financial_Systems), a PO’s ERP number must be filled in for the PO to proceed to the next stage of the workflow. If the ERP number is not filled in, the PO is sent to the ERP to receive a number, after which it is re-imported to Alma using the Import PO Approvals job. If the ERP number is filled in, the PO (after it is approved in Alma) is sent to the vendor and the ERP simultaneously. For more information see [Integrating POs with ERP Number for Approval](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/020Acquisitions/050Purchasing/010_Purchasing_in_Alma/Purchasing_Workflow).

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 the Order List Letter. For information on the Order List Letter, see [Configuring Alma Letters](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/050Administration/050Configuring_General_Alma_Functions/070Configuring_Alma_Letters). You can view the Order List Letter 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 send 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, 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](https://www.youtube.com/watch?v=oAgIkPz6Qrk).

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 want to delete a PO, see [Deleting POs](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_%28English%29/020Acquisitions/050Purchasing/Working_with_POs_and_PO_Lines/Deleting_POs).

Note: You can also delete a PO from the main menu by selecting

Acquisitions>Purchase Order>Delete PO.