How to configure Reporting Codes

To configure reporting codes, you must have one of the following roles:

* Acquisitions Administrator
* General System Administrator

You define reporting codes that can be used for analyzing acquisitions in subsequent reporting.

These codes appear in Alma in the drop-down lists on the PO line Summary tab. For example, if you have a reporting code for postage, you can then create a report that lists all PO lines that have postage reporting code. Reporting codes apply to all libraries within your institution.

You configure reporting codes in the 1st, 2nd, 3rd, 4th, and 5th reporting code tables.

Configuration Menu>Acquisitions>Purchase Orders> 1st, 2nd, 3rd,4th, and 5th Reporting Codes.



I clicked on 2nd reporting codes, and it showed none, so I am creating one by clicking on Add Row





Click on Customize and search for one of your POLS and you will see the new reporting code in the dropdown.

