

Purchasing Overview

Welcome to this training session on acquisitions in Alma. In this session, you will see an overview of purchasing workflows, and the various ways you can start the purchasing process.

Purchasing is part of the larger process of Acquisitions in Alma. That process begins with setting up the acquisitions infrastructure, continues with purchasing, then moves on to receiving and activation, and finally invoicing.

The purchasing workflow includes several steps. First, you choose an item and create a purchase order line for that item. Next, Alma automatically normalizes and validates the PO line. Staff at your institution then can review the PO line. PO lines for items that are from the same vendor are packaged into a purchase order. The purchase order gets approved. Finally, the purchase order is sent to the vendor, and then Alma waits until the item arrives, and you can start the receiving workflow.

Several of the steps in the purchasing workflow can be done automatically by Alma if your institution wants to set it up that way. For example, the normalization and validation step is an automated process that ensures the PO line meets your institution's requirements and, if not, Alma flags the PO line for review by staff. On the other hand, if Alma determines the PO line meets those requirements, the review step will be skipped and Alma will package the PO line into a purchase order.

The packaging step itself could be configured to be a manual process performed by staff members, or an automated process performed by Alma. Or you can configure Alma to go one way or the other depending on certain parameters, such as the value of the order, or the type of material.

The purchase-order approval step can also be configured to be either automatic, or manual, or both. Many institutions allow Alma to automatically approve a purchase order if the value is less than a certain amount.

Details on configuring the acquisitions process are available in documentation and in the Alma administration training. And talk to the acquisitions administration team at your institution to see how Alma has been configured for these various steps.

For most of the acquisitions staff at your institution, the first step -- creating a PO line -- is where you will spend a lot of your time. There are three different ways you can create a PO line.

You can create a PO line manually. It could be for an item your institution already owns; it could be an e-resource you find in the Community Zone; or it could be a bibliographic record you get from a vendor when you purchase the item manually from their website. Then, you'll add all the details yourself to the PO line and submit it for review.

The second way to create PO lines is to use files with Embedded Order Data, or EOD files. For some vendors, you purchase items directly from the vendor, then they send you EOD files, and you import the EOD files into Alma. The files contain bibliographic records that include purchasing and inventory

information. Alma automatically creates the purchase orders with PO lines, and sets them to be ready to receive the items.

The third way to create PO lines involves real-time ordering with Alma's API technology. If the vendor supports this, your institution can configure a way for the vendor's computer systems to communicate with Alma. Then you place orders with the vendor, and real-time ordering data is sent automatically to Alma, again creating POs and PO lines.

More details about these three methods are in the next purchasing training session, Creating Orders.

The other training sessions on purchasing will go deeper into purchasing physical items and electronic resources, configuring review rules, and importing bibliographic records for purchased materials.

And that is an overview of purchasing workflows in Alma.