

Creating Orders

Welcome to this training session on acquisitions in Alma. In this session, you will see a brief overview of the three ways to create orders in Alma: Manually entering a purchase order line; importing an embedded order data or EOD file from a vendor; and real-time ordering from a vendor using Alma's API.

No matter what kind of resource you want to order, to create an order manually, you need to have a bibliographic record. There are several ways to get one. If the item already exists at your institution and you're buying another copy, then you can search for the bib record in your Institution Zone in Alma, and then click Order. On the other hand, if you're going to order a new electronic resource, such as a collection or even an individual portfolio, you may be able to find a bib record in the Community Zone. In a similar way, if you're a member of a consortium and your consortium has a Network Zone in Alma, you can search for the bib record there. There is also the option to search for bib records in external sources, such as WorldCat, Library of Congress, British Library, and many more. And if you have already ordered a resource from a vendor by contacting the vendor directly, and you are adding the order to Alma for receiving and invoicing, then the vendor may have sent you a bib record and you can import it into Alma.

Once the bib record is in your Institution Zone, click Order to start the process of creating a purchase order line.

The rest of the manual-ordering process depends on whether you are ordering physical or electronic material, and whether you are placing a one-time order or a subscription. Details about each of those processes will be discussed in the next few Acquisitions training sessions.

The second way to create orders is by importing an Embedded Order Data (or EOD) file. An EOD file comes from a vendor, where you already purchased resources directly, not from within Alma. An EOD file has bibliographic and inventory data, as well as purchasing information. This type of import results in the creation of bibliographic and inventory records, and PO lines based on order information in the EOD file.

More detail on EOD imports can be found in the training session on batch imports of Resources.

The third way to create PO lines in Alma is to use Real-Time Acquisitions. In this situation, you again purchase a resource directly from a vendor. But in this case, for some vendors, you can set up in advance that their computer system is allowed to send information directly to Alma using Alma's API. Alma then automatically runs the New Order API job on a regular basis, new order information is sent from the vendor to Alma, and Alma creates the PO lines and purchase orders.

Real-time ordering only works with some specific vendors that use the OASIS or GOBI systems. Also, there is some configuration your institution needs to do, which may require assistance from Ex Libris staff. For example, you'll need to create an Integration Profile for a New Order API. And you'll send the API key to your vendor. However, once everything is set up, acquiring resources is much easier for your staff, because they only need to work in the vendors' systems, and Alma automatically takes care of creating orders.

For more information on Real-Time Acquisitions, see the documentation in the Knowledge Center, and consult the Ex Libris Developer Network.

And those are some ways to create orders in Alma.