**A Selection of User Roles Related to Acquisitions**

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| **Configuration** | |
| **Acquisitions Administrator** | Manages acquisitions configurations, such as PO review rules, reporting codes, and running acquisitions related jobs.  Select **Read Only** to enable the user to view but not edit acquisitions configurations. |
| **Fiscal Periods, Ledgers, and Funds** | |
| **Fiscal Period Manager** | Manages copy ledger and editing of fiscal period tables when assigned in conjunction with the Acquisitions Administrator role. |
| **Ledger Manager** | Enables creating and editing ledgers, adding funds and allocations, performing transactions, and updating ledgers and funds. |
| **Fund Manager** | Manages all fund-related actions, including allocations and transactions, creating, updating, and closing funds. |
| **Fund-Ledger Viewer** | Views funds and ledgers only. |
| **Vendors** | |
| **Vendor Manager** | Manages all aspects of vendor records. |
| **Vendor Account Manager** | Manages the vendor account elements of vendor records. |
| **Purchase Orders** | |
| **Purchasing Manager** | Manages authoritative purchasing operations, such as reviewing and approving POs, activating electronic resources, assigning PO lines to purchasing operators, and linking licenses to PO lines. Can also view vendor data, ledgers and funds, and invoices. Can create and edit holdings by scope. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. |
| **Purchasing Operator** | Manages all purchasing operations, including creating, reviewing, and updating PO lines, reassigning PO lines to other purchasing operators, managing electronic resources, and linking licenses to PO lines. Can also view vendor data, ledgers and funds, and invoices. Can create and edit holdings by scope. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. |
| **Purchasing Operator Extended** | Can delete PO lines.  Must be combined with Purchasing Operator. |
| **Activating Electronic Inventory** | |
| **CDI Inventory Operator** | When the CDI model is set to the Fully Flexible activation model, users with this role can activate or deactivate a CDI electronic collection, remove the CDI-only full text activation, and edit fields in the CDI tab in the Electronic Collections Editor. This role can be set independently or used in combination with the Electronic Inventory Operator. When the two roles are combined, users can, when using the Activation Wizard, set the CDI search activation and full text activation with a single action. |
| **Electronic Inventory Operator** | Manages the institution’s electronic inventory, including adding local electronic collections, and local portfolios, managing electronic resource activation, and creating and managing sets. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. Manages the institution’s electronic inventory, including adding local electronic collections, and local portfolios, managing electronic resource activation, and creating and managing sets. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. |
| **Electronic Inventory Operator Extended** | Can delete electronic inventory. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record.  Must be combined with Electronic Inventory Operator. |
| **Receiving Physical Inventory** | |
| **Receiving Operator** | Manages the arrival of both physical and electronic purchased items.  A service unit must be assigned when configuring this role. |
| **Receiving Operator Limited** | Has Receiving Operator privileges but cannot delete orders. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record.  A service unit must be assigned when configuring this role. |
| **Invoices** | |
| **Invoice Manager** | Manages invoice creation, review and approval activities, and assigning invoices to other operators. |
| **Invoice Operator** | Creates, edits, and reviews invoices. Reassigns invoices to other invoice operators. |
| **Invoice Operator Extended** | Can delete invoices.  Must be combined with Invoice Operator. |
| **Analytics** | |
| **Analytics Administrator** | Enables configuring analytics and exposing analytics to other staff operators. |
| **Designs Analytics** | Enables creating analytics reports. |
| **Cataloging** | |
| **Cataloger** | Performs cataloging activities for bibliographic, holdings, and authority records, and creates and manages sets. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. Can manage normalization rules.  *Assign to* ***Purchasing Operators*** *so they can create new records in the MD editor via Search Resources and templates.* |

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| **Term** | **Definition** |
| **Acq** | Acquisitions |
| **API** | *Application Programming Interface* that allows Alma and other systems such as an ERP to interact or communicate​ |
| **Approval** | Process of confirmation that a PO line is approved for ordering, or an invoice is approved for payment​ |
| **CDI** | Central Discovery Index |
| **CZ** | Community Zone |
| **EDI** | *Electronic Data Interchange* is the concept of businesses electronically communicating information that was traditionally communicated on paper, such as purchase orders and invoices |
| **EOD** | *Embedded Order Data* enables automatic creation of purchase orders with via bulk import based on data in vendor-supplied MARC records |
| **ERP** | *Enterprise Resource Planning* systems, usually the finance system at an institution​ |
| **Fiscal Period** | A period of time, usually a year in length, during which a ledger/fund structure is valid for use (eg 1 Jan – 31 Dec; 1 Jul – 30 Jun)​ |
| **Fund** | Budgets used for funding acquisitions activities ​  Funds are aggregated in a ledger​ |
| **Inventory** | Resources owned, licensed by, or associated with a library, institution or consortium; may include physical holdings and items, electronic portfolios, digital representations, and deposits |
| **Invoice** | One or more invoice lines acknowledging payment for resources ordered​ |
| **Invoice Line** | One or more copies of electronic or physical resources being paid for by a library​ |
| **IZ** | Institution Zone |
| **Ledger** | Collection of funds relevant for a fiscal period |
| **Material Type** | Type of material, such as an electronic journal collection or book, from which the item takes its form |
| **NZ** | Network Zone |
| **Purchase Order** | One or more PO lines sent to a single vendor ​  Often referred to as a PO​ |
| **Purchase Order Line** | One or more copies of electronic or physical resources to be purchased by a library  Often referred to as a PO Line |
| **Reporting Code** | Used for analyzing acquisitions in subsequent reporting​ |
| **Vendor** | A supplier of electronic services or physical goods |
| **Vendor Account** | A subset of the vendor account that is used to distinguish among types of resources acquired from a vendor |
| **Vendor Interface** | A group of electronic collections such as Alexander Street Press or Ebook Central offered by ProQuest |