Alma Administration – Acquisitions
Acquisition Methods

Alma supports several acquisition methods for resources, such as Purchase, Exchange, and Gift. When manually creating a PO line, the Purchasing Operator selects the relevant acquisition method (or leaves it on the default).

In this session, we'll learn how to configure which acquisition methods are available in the drop-down list when creating a PO line; and we'll get acquainted with the various acquisition methods in Alma.

Alma Administrators can configure the available acquisition methods under Alma Configuration > Acquisitions > Purchase Orders > Acquisition Method. Here you can see which acquisition methods are available for your orders. Enable an acquisition method to make it available in the PO line drop-down list, and disable it to remove it from the list. In the Description column, you can enter the text label as it will appear in the drop-down list. You must also select one acquisition method to be the default selected value. Note that you cannot add, edit, or delete methods. When done configuring the acquisition methods, click Save. The available acquisition methods are now updated. Note that existing PO lines are not affected by this configuration.

Let's go back to the Acquisition Method code table to get acquainted with the various acquisition methods.

Each acquisition method has two versions: one that sends a letter to the vendor, and one that does not. By default, one of each is disabled; but you may enable these to display both options in the drop-down list.

The available acquisitions methods are:

Purchase – to purchase the resource from a vendor.

Legal Deposit – for governments and national libraries that receive copies at no charge from vendors.

Gift – the resource is granted as a gift from the vendor to the institution.

Technical – This method is for service subscription orders without inventory or items that have migrated from an external system. This method is often used for multi-part orders where you pay once and receive multiple resources.

Depository – is used when your institution agrees to host government publications and make them freely available.

Exchange – is used when you exchange resources with another institution.

Note that the Gift, Technical, Depository, and Exchange methods all behave exactly the same: They order the item without need for payment. However, they will appear differently in your reports.

The Vendor System method – is used when purchasing via an external vendor system.

And finally, Approval Plan – is used when an agreement is in place that the vendor sends whatever resources they determine are necessary to your institution, in EOD format.

Note that the Vendor System and Approval Plan methods behave identically in that they require pricing and fund information, and they do not actually send the PO lines to the vendor; rather they package them into POs and mark them as sent until they are received or activated.

You should now be familiar with the various acquisition methods and how to configure which are available in your institution. More information can be found in the documentation.

Thanks for joining!