Getting to Know Alma – Acquisitions
Acquisitions Overview

Acquisitions is the process of purchasing physical and electronic materials for your institution from third-party vendors. In this session, we will look at the types of acquisitions available, and get acquainted with the acquisitions workflow.

The acquisitions workflow in Alma differs depending on the type of material: physical or electronic.

For physical items, such as books, the general workflow is placing the purchase order with the vendor, receiving the item in the library, and processing the invoice for payment.

For electronic resources, such as online journals, the workflow consists of purchasing, activation of the online resource once there is access, and invoicing.

Acquisitions also differ by type of order: one-time or continuous.

One-time orders are intended for one or more books or e-books that are bundled in the same purchase and received on a single occasion.

Continuous orders are subscriptions to physical or electronic periodicals that are received on a continuous basis and may require renewal when the subscription is up. Alma can be set up to automatically receive the items as they arrive and renew the orders when applicable.

Acquisitions are managed under the Alma menu > Acquisitions. Here you can manage Purchase Order Lines, which are the basic entity for creating and processing an order for a title. Purchase Order Lines are bundled into Purchase Orders which are sent to the vendor. In this section, you can handle the Receiving and Invoicing of purchased items, including payment. Other options available in this menu include managing purchase requests and running the import of bibliographic records from the vendors’ systems.

There are several ways to start an order in Alma. One method is to search for the title in your repository or the Community Zone, and when you’ve found it, click Actions > Order. This opens the wizard for creating a purchase order line for our title. Select the relevant PO line type: Is your order Physical or Electronic? One-Time or Subscription? Which library in your institution will own this purchase? After filling in the details, click Create PO line. A new purchase order line is created, where you can fill in the details of the purchase, including the vendor and pricing information. Once you save the order, it will advance to the next step of the acquisitions workflow!

Thanks for joining!