Alma Essentials – Acquisitions  
Purchasing Electronic Resources

Hi, in this session, you will see how to order electronic resources by manually creating a Purchase Order Line. You'll learn how to make one-time orders, continuous or subscription orders, and database orders, using bibliographic information from the Community Zone.

These workflows require the Purchasing Operator or Purchasing Manager role.

To begin, search the Community Zone for the resource you plan to purchase. The Community Zone contains bibliographic information about hundreds of thousands of resources, mostly electronic collections and portfolios. By the way, if your institution is part of an Alma Consortium and you share a Network Zone, this process will work there, too.

Find your e-book; then choose the action Order.

On the PO Line Owner and Type page, Alma has already added the key bibliographic data of this e-book. The PO Line Type will determine the rest of the workflow for this material. Based on the bib record, Alma has some recommended types, including the one you need: Electronic Book - One Time.

For PO Line Owner, select the library at your institution that is responsible for the order. This is not necessarily the library that will make the resource available.

Click Create PO Line.

This is the Purchase Order Line Details page. You can scroll between its various sections, or click on a section name to jump to it.

Our PO line has been assigned a number, and the status of this PO line is "In Review."

Here you can see a list of the ordered portfolios. Notice that the item is Not active. We'll come back to that in a minute.

Under PO Line Information, the Acquisition method field has several options. If you choose Purchase, then the purchase order will be sent by Alma to the vendor, using the information that was configured in the Vendor and Vendor Account. If you select Purchase at Vendor System, then this purchase order will not be sent from Alma to the vendor. Pick that choice if you already ordered from the vendor using the vendor's own system, or if you are going to order that way. A Technical acquisition can be used for several situations where you're not actually buying something. For example, if you bought a print book and the vendor also provides access to an e-book version of the book for free, then you could create a technical PO line for the e-book. The rest of the acquisition methods are less common, and are explained in the documentation.

If this item has already been ordered and invoiced, then you can select a different Invoice status.

Whenever editing a section, make sure to save your edits.

In the Vendor Information section, the only required field is Material Supplier; this is the vendor you pay. Search for the vendor and select it. The access provider is not required, but if you'll be accessing the resource from a different provider than the material supplier, it's important to select it here. You can add an Expected activation time in days, and an Activation due after ordering time in days. If the item is not activated by then, Alma will generate a claim if configured to do so.

Next is the Pricing and Funding section. If you will be paying for this resource, enter the list price.

For most orders, you will need to select the Fund that will be used to pay for this item. Click here to add a fund, look up the relevant fund, and select it. Note that this fund does not have to provide 100 percent of the funding; you can add more funds and split the funding between them.

In the Activation Information section, you can optionally attach a license to this resource. You can also indicate the Access Model for this resource.

Your institution may use custom Reporting Codes, which can provide information about this PO line for analytics reports.

When you're ready to place the order, there are a few options. If you select Continue Workflow, then the PO Line will move to the next step in the acquisitions workflow, which is to wait for packaging into a purchase order. The PO Lines Packaging job will run overnight and package all PO Lines together that are for the same vendor.

On the other hand, you can select Order Now. That will immediately package this PO line into its own purchase order, and move it to the next step in the acquisitions workflow.

If there are any alerts, they will appear in the confirmation dialog. Click Confirm to create the new purchase order.

The confirmation message includes a link you can use to search for this PO line. You can see the new purchase order number, the PO line number, and that the order has been sent.

Once the vendor acknowledges the order, you will need to activate the resource so your patrons can find it in your discovery service. More on this in the Activating Electronic Resources session.

Many electronic resources are received on a continuous basis, such as a subscription to an e-journal or even a full collection of e-resources. The process for filling out the purchase order line is similar, and can start again at the Community Zone or Network Zone. For this example, choose an electronic collection. After you click Order, you'll choose the PO line type. This time, it's Electronic Collection - Subscription. Again, pick the acquisitions team that will own the PO line. If someone at your institution has created an order template for the vendor you are using, then you can load the template and save yourself some work on the next page.

Click Create PO line.

Fill in the PO Line Details page, as you did for the one-time order; but note there are a few differences for subscriptions.

For example, under PO Line Information, there is a field to indicate if the vendor has any restriction on cancelling the subscription.

There is also a new section for Renewal Information.

It is useful to enter the Subscription from date and to date, but you're required to enter a Renewal date. This is the date the vendor says you have to notify them of your intention to renew the subscription. You also are required to enter the number of days before that renewal date that you'd like Alma to remind you about the renewal.

You may select Automated renewal, then Alma will automatically renew the subscription with the renewal cycle you select here.

Save your edits.

When done editing the PO line, one option for the next workflow step for an electronic resource is a to Start a Trial, if that is offered by the vendor. Trials will be discussed in another training session.

For this example, finish with Order Now.

Again, even after you order and pay for this electronic collection, you'll need to activate it so your patrons can find all the resources from this collection in your discovery service.

The third type of e-resource ordering in this training session is the Database. As was discussed in other training sessions, a Database in Alma is an electronic collection that doesn't provide any full text but instead provides access to abstracting and indexing resources.

As before, locate a database in the Community Zone or Network Zone that you want to order. Note here that this collection is Type: Database. Click Order. For PO Line Type, choose Database Service. Select the library that will manage the PO Line. Then Create PO line.

Fill in the Po line details as before. For the Acquisition method we’ll Choose Purchase at Vendor System. That way, Alma immediately packages this PO Line into a purchase order, but doesn't send the purchase order to the vendor because it assumes you already placed the order on the vendor's system.

Click Order Now.

Unlike with e-books or electronic collections, Databases are activated automatically. Search the Institution Zone for your Database. This icon indicates the Database record is connected to the Community Zone record. Also, the icon is blue instead of black, which means the Database is already activated. As long as the bibliographic record is not suppressed from discovery, and there is a collection-level URL, then the Database is activated in Alma.

And those are some ways to purchase electronic resources in Alma!