

**Getting to Know Alma: Purchasing Physical and Electronic Items**

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| **Purchasing a Physical Item (Book)** | |
| 1. Log into Alma with the AlmaUser01 user |  |
| 1. Conduct a search for physical title (e.g. Wildflowers of North America­). 2. From the row actions list of the title in the results, select “Order” |  |
| 1. In the ***PO Line Owner and Type screen***, set the PO Line type = “Print Book – One Time” 2. Set the PO Line Owner = “Main Library” 3. Click “Create PO Line” |  |
| 1. Note that the Confirmation Message will say that the item already exists in the inventory 2. Click Confirm to continue making the PO Line. |  |
| 1. In the Vendor information section, select a Material Supplier (e.g. Coutts Information Services) 2. Fill in the *List Price* 3. Keep *Quantity for pricing* set to 1 |  |
| 1. In the Funding section, Select + Add Fund 2. Select a Fund (e.g. Mock Print Fund) 3. Click the Add Fund button |  |
| 1. In the PO Line Details section, set the Acquisition method = Purchase at Vendor System 2. Assign the Reporting code, secondary reporting code, and tertiary reporting codes as you like. |  |
| 1. Click the “Order Now” button |  |
| 1. Click Confirm to send the PO line and create the purchase order. |  |
| 1. Search for the title in the Order lines. |  |
| 1. Note that the PO Line and the PO have been assigned identifiers and that they are both “Sent” |  |
| **Purchasing an Electronic Collection** | |
| 1. Conduct a search for “ProQuest Historical Newspapers” in Electronic Collections in the Community Zone |  |
| 1. Choose one of the electronic collections that does not have the institution icon (i.e. the collection is not part of your local inventory). 2. In the row actions list, select “Order” |  |
| 1. In the ***PO Line Owner and Type screen***, set the PO Line type = “Electronic Collection - Subscription” 2. Set the PO Line Owner = “Main Library” 3. Click “Create PO Line” |  |
| 1. In the PO Line Details screen in the Ordered Items section, select “ProQuest” for the License, Material Supplier, and Access Provider. |  |
| 1. In the Pricing section, enter in a List Price and keep the Quantity for pricing set to 1. 2. In the Funding section, Add a Fund to cover the cost of the electronic collection |  |
| 1. In the PO Line Details, set the Acquisition Method = Purchase at Vendor System 2. Assign Reporting Codes as you like. |  |
| 1. In the Renewal section, set the Renewal date to a date in the future (i.e. a year from now) 2. Set the Renewal reminder period to 30 days 3. Click “Order Now” |  |
| 1. Click Confirm to place the order and create the purchase order. |  |