

### Acquisitions Overview

Welcome to this training session on acquisitions in Alma. In this session, you will learn the various acquisition workflows in Alma, as well the types of acquisitions that are available, and the Alma user roles that are needed for acquisitions.

#### **Acquisition Workflows**

Acquisitions at your institution are all about obtaining physical and electronic materials. In general, you place an order with a vendor or publisher. Then later, you receive the physical items you ordered, or you are granted electronic access to them. You pass the physical items to cataloging and shelving. Then you pay for the items.

The workflows in Alma correspond to each of these tasks.

The Acquisitions Infrastructure workflows guide you in setting up the ledgers, funds, vendors, and vendor accounts needed for purchasing.

The Purchasing workflows allow you to place an order for an item or items, group those items into a purchase order, and then send the purchase order to a vendor or publisher so the order can be filled.

The Receiving workflows allow you to receive and process physical items.

The Managing Electronic Resources workflows allow you to activate, test, and give your patrons access to electronic resources.

And the Invoicing workflows allow you to create an invoice to pay for the items.

Other training sessions on Acquisitions will cover each of these workflows in more detail.

#### **Item Types and Order Types for Acquisitions**

When acquiring items for your institution, the type of item and the type of order will, in part, determine the workflow for the acquisition.

First, there are two different types of materials: physical and electronic. Some Alma institutions have a third type of material: digital. However, digital materials are not really "acquired," so they won't be covered in acquisitions training sessions.

For physical materials, there are three types of orders: one time, continuous or subscription, and standing orders. Examples of one-time orders include print books, maps, music scores ... really, any item that is not published repetitively. Then there are continuous orders, for example, serial subscriptions like print journals. Standing orders are not typically received through the usual receiving process, but they

are used for keeping an order open when you cannot predict when the item will arrive, for example, approval plans, memberships, and series monographs.

Electronic materials are usually purchased with either one-time orders or subscription orders. Standing orders are not typically used for electronic materials. One-time orders would include single-payment electronic resources like e-books. Here, you pay once, and you have access as long as the resource is available from the provider. Subscriptions or continuous orders are typically used for electronic journals or electronic packages: You pay a subscription fee, and you will lose access if you stop paying for it.

### **Acquisition User Roles**

Because there are many different components to these workflows and you may have different staff at your institution performing these steps, Alma contains user roles.

Roles ensure that the appropriate staff member can perform the tasks for which they are responsible, and they can't perform tasks for which they should not be given access. This is the list of the Acquisition Roles that are available in Alma.

In each of the Acquisition Workflows training sessions, you will learn which role or roles are needed to perform those specific functions in Alma.

And that is an overview of Acquisitions in Alma.