Overview of Alma Acquisitions Workflow

- Primary Acquisitions Workflows
  - Purchasing Workflow
  - Receiving Workflow (Physical titles)
  - Activation Workflow (Electronic titles)
  - Invoicing Workflow
- Related Information
  - POL Statuses
  - Aleph to Alma Data Mapping Guide (aka Migration tables)

Primary Acquisitions Workflows

Alma supports several basic Acquisitions workflows, plus other activities that - at Harvard - fall under Order Maintenance.

Purchasing Workflow

- Orders can be created either manually, or via an order load (called EOD: Embedded Order data)
- Orders can be either One-time (monographs) or Continuous (serials and standing orders)
- Purchase order lines (POLs) contain the order information, vendor, budget, renewal period for ongoing orders, etc
- Inventory (meaning: items and holdings) can be created automatically or manually during the POL creation
- Purchase order lines go through a validation phase to check for mandatory information and an additional review phase (if there is inaccurate or missing data)
- Once the POL passes review and validation it is "packaged" into a Purchase order (PO) and sent to the vendor (if applicable), either by EDI or email

Receiving Workflow (Physical titles)

- Receipt of Physical material is indicated via a Receiving process on the item records
- Items can be marked as Received as a separate process or during the invoicing process
- After receipt, the titles can be assigned to another section for cataloging, binding etc, or marked In transit to be sent to their final destination
- One-Time orders close when fully invoiced and received
- Continuous orders remain in the status "Waiting for Renewal" once an item has been received and the invoice paid: these orders are closed manually

Activation Workflow (Electronic titles)

- Electronic titles go through an Activation process (rather than a Receipt process) in Alma; the link is tested and then made active
- One-Time orders close when fully invoiced and activated
- Continuous orders remain in the status "Waiting for Renewal" once activated and the invoice paid: these orders are closed manually

Invoicing Workflow

- Invoices can be created manually (either from scratch or from a POL or PO), from an Excel file uploaded into Alma, or loaded as EDI
- Invoices go through a system validation and review (if there is any missing or inaccurate data) process after creation
- Invoice approval is the final step

Related Information

POL Statuses

See: POL Statuses

Aleph to Alma Data Mapping Guide (aka Migration tables)

See: Acquisitions and Serials Data Mapping Guide