Acquisitions Workflows and Vocabulary - Acquisitions Overview Module

This is the first section of the Acquisitions Overview module to the Alma Overviews course. The video is at the top of the page, followed by the script.

In this video, you'll review:

- Acquisitions Overview
- Purchase Types
- POL, PO, and PO Owner
- In Review and Approval

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Acquisitions Overview

Welcome to the Acquisitions Overview module of the Alma Overviews online course. In this module, we will review Acquisitions workflows, introduce Alma-specific Acquisitions vocabulary, and demonstrate a few examples of purchasing, receiving, invoicing, and order maintenance tasks.

If you haven’t already watched the Searching module, the Acquisitions-related searching examples, and the Finance module of the Overviews course, please review that material before watching this module. That information is required to understand concepts presented in these videos.

The overall sequence of Acquisitions in Alma is:

- Purchase
- Receiving physical items or Activating electronic titles
- Invoicing
- Order Maintenance
- Renewal (continuous orders)

The Acquisitions process begins when a staff member identifies something that needs to be acquired. No matter how that item is acquired – purchase from a vendor, purchase from Amazon or another seller, gift or donation, creation within the university, etc. – the Acquisitions process in Alma can document how the material was added to the collection and any funds expended in that acquisition.

There are three primary workflows associated with physical Acquisitions: Purchasing, Receiving, and Invoicing. Continuous orders have an additional Renewal workflow, eResources have Evaluation and Activation workflows, and there are a few other specialty workflows.

To review, a workflow in Alma is a system-driven process that automates frequent tasks. When staff complete an action in the workflow, the system moves the order or invoice on to the next step automatically. For instance, in the purchasing workflow, staff create the order and the system validates and may package it to be sent to a vendor with similar orders.

These workflows are distinguished from manually created, staff-driven Work Orders, which are reviewed in the Work Orders module of this online course.

In Acquisition module, we will review the Purchasing, Receiving, Invoicing, and Renewal workflows in this module. For more on eResources, please watch the eResources Overview module, and for more on Work Orders, watch the Work Orders module.

Next, let’s look at vocabulary that Alma uses throughout the Acquisitions process:

Purchase Types

Alma identifies two basic types of orders: one-time orders and continuous orders like serials. Standing orders are a sub-type of continuous order.

- **One-time Orders** are infrequent orders for physical books, e-books, or other materials that are not published repetitively. Use this type when you are ordering something that consists of **one item**: otherwise adding additional items can be cumbersome during the receiving process.

  - **Continuous Orders**: Continuous orders are orders that are repeated on a regular basis; for example, monthly subscriptions to serials or periodic volumes of an encyclopedia, or a standing order for a travel book series or all works by a single author. For cases where you are ordering something that would have more than one item, the best practice would be to select a continuous order type:

    - For example, if I wanted to order, the backfile of 10 serial issues: If I used the **one-time print order** type, I would have to receive one item in the receiving list, and then go into the list of items and manually duplicate and create items for the remaining 9 issues. However, if I choose **Alma print journal subscription** (a continuous order type), I could just receive all 10 items in the receiving list and then manually close the order.

This will all make much more sense when we get through the ordering and then receiving videos.

POL, PO, and PO Owner

Next, Alma uses consistent terms for the different order components: Purchase Order Line, Purchase Order, and Purchase Order Line Owner or POL Owner.

- **Purchase Order Line** or **POL** is an individual order for a single title (though you can order multiple copies of that title in the same POL).

  - The **Purchase Order** or **PO** is what is sent to a vendor. A PO could consist of just one POL or multiple order lines of the same type (one-time or continuous) going to the same vendor.

  - The **PO Line Owner** is the unit responsible for creating the order.
These are called "libraries" in Alma, even if it's something like ITS Acquisitions. These control the bill to/ship to information attached to the order.

The last Alma Acquisitions concept I want to introduce is the difference between the statuses of In Review and Approval.

In Review and Approval

Orders and invoices may be configured to require staff review and approval at different stages in their workflows.

- When a purchase order line, purchase order, or invoice has a status of In Review, information is from that order or invoice is either missing or wrong, according to Alma. Staff need to correct or add that information before the order or invoice will move on to the next step in the workflow.
- In addition, some Purchase Orders or Invoices must be manually approved before they will be sent to the vendor or to the finance department, respectively. Other POs are set up to be automatically approved, depending on the vendor.

Look under the Acquisitions menu for options to Review or Approve orders, purchase orders, and invoices; these are visible to staff with the appropriate permissions.

That's been our introductory vocabulary review. In the next video segment, we will go through the Purchasing workflow with an example of a simple one-time order, and note some additional considerations for serials.