

Acquisitions

[Return to Alma Roadmap Highlights Overview](#)



Acquisitions

Overview

Alma Acquisitions supports the full end-to-end workflows required for various types of acquisition methods from the point of order to the point of usage harvesting and analysis.

Roadmap

2021 H2	2022 H1	2022 H2-2023
<ul style="list-style-type: none"> Interested Users - Enhanced Functionality SUSHI – Harvesting Period 	<ul style="list-style-type: none"> PO Line Workflows - Enhanced UX Improved License Management Order It! - Effectively create orders both within Alma and From External Vendor Platforms Improved Acquisitions Indexing and Searching 	<ul style="list-style-type: none"> Receiving Workbench - Enhanced UX Search Acquisition Entities by their Notes EDI – Support for “Quantity for Pricing” and “Access Model”

2021 H2

Interested Users - Enhanced Functionality

What's New	Highlights	Impact
New options to control the PO line 'Interested Users' functionality will allow for more granular control on when a	4 major improvements will be introduced as part of this	Institutions will be able to serve their patrons in a better more reliable way when sending

What's New	Highlights	Impact
<p>notification will be sent to the interested users once an item arrives or is activated.</p>	<p>enhanced functionality:</p> <ul style="list-style-type: none"> • Purchase Request editing screen - Staff users will be able to decide which notifications will be sent to the users directly from the purchase request screen • "Create Order" import profile (EOD) - New mapping will allow institutions (creating orders via files received from the vendor) to determine which notifications will be set for PO lines created from the import process (this includes the Patron-Driven Acquisitions import process) • A dedicated Job will enable users to create a set of PO lines and apply the "Interested Users" settings on the members of the set. • Upon the receiving of a new physical item, a new setting will allow institutions to determine whether the interested user notification be sent once the item is received or once the item is made available (user clicked 'Done'). 	<p>notification regarding newly received/activated item availability.</p>

back to [Acquisitions Roadmap](#)

SUSHI – Harvesting Period

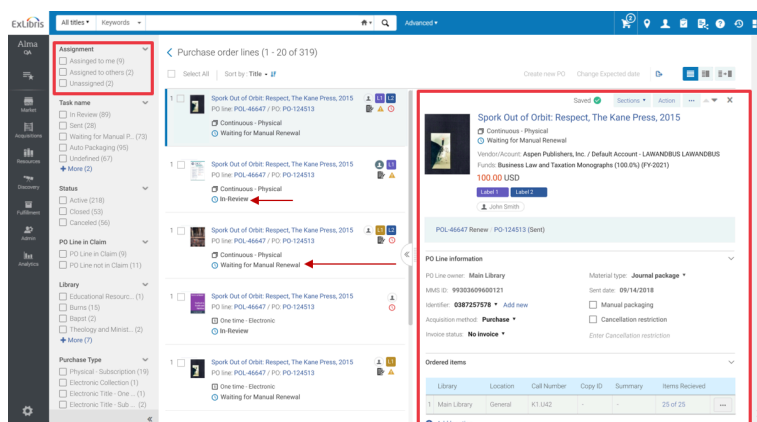
What's New	Highlights	Impact
<p>When a user manually requests that a SUSHI account/report be harvested, the user will be given an option to define the exact time period for which they would like to harvest the usage data</p>	<p>The option to select the time frame when using the manual harvest option will allow users to:</p> <ul style="list-style-type: none"> • Harvest usage data for greater than 12 months previous for newly configured accounts • When troubleshooting data errors, users will be able to harvest a single month at a time 	<p>Institutions will no longer have to go to the vendor website in order to retrieve past usage</p>

back to [Acquisitions Roadmap](#)

2022 - H1

PO Line Workflows - Enhanced UX

What's New	Highlights	Impact
<p>The PO Line Search Screens and Task Lists will be updated and redesigned for better usability, performance, productivity and overall user experience</p>	<ul style="list-style-type: none"> Adjustments to the purchase order line task list will enable users to review all PO lines for all statuses on one screen Easy way to browse and navigate back to PO lines which were created or edited by the user in order to review or refine the PO line. 	<p>Help users to easily navigate from one task to the other in a more streamlined manner.</p> <p>NOTE - This new functionality will be introduced during 2021 H2 to the UX focus group in order to evaluate the changes. A general release will be introduced once all testings are complete.</p>



back to [Acquisitions Roadmap](#)

Improved License Management

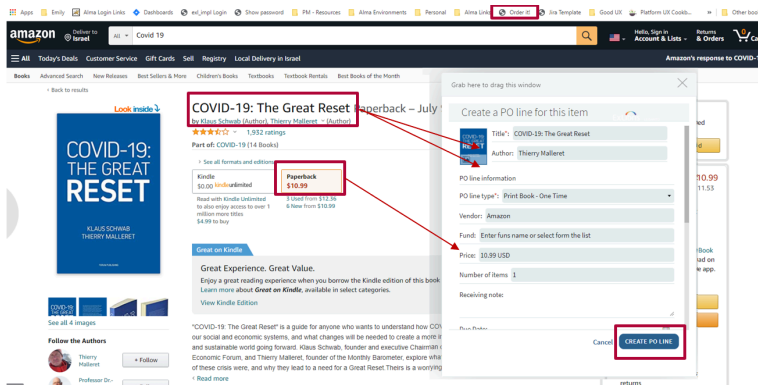
What's New	Highlights	Impact
<p>Enable users to streamline the creation and deletion of licenses.</p>	<ul style="list-style-type: none"> The loading of ONIX PL files will be improved in order to easily input the vendor's information and license terms into Alma Enhancement to the existing functionality of deleting a license in Alma which will allow for a partial/full removal of a license from the system 	<p>Improve user efficiency in the license creation and deletion process.</p>

back to [Acquisitions Roadmap](#)

Order It! - Quick ordering within Alma and external vendor platforms

What's New	Highlights	Impact
<p>Users will have the ability to utilize new streamlined options for creating PO lines in Alma and also external to Alma with vendor platforms that do not</p>	<ul style="list-style-type: none"> In Alma - A new minimal form will allow users to quickly and effectively create a PO line. 	<p>Improve user efficiency with order creation.</p>

What's New	Highlights	Impact
integrate with Alma.	<ul style="list-style-type: none"> • External to Alma - New functionality for scenarios where the user orders a resource from a platform that has no automatic integration with Alma (e.g. Amazon): A browser add-on will allow for the harvesting of the metadata and will create the order automatically. The user will no longer need to access Alma in order to create the order. 	



back to [Acquisitions Roadmap](#)

Improved Acquisitions Indexing and Searching

What's New	Highlights	Impact
Acquisition searching will be enhanced with a new infrastructure and search index options	<ul style="list-style-type: none"> • Improved Indexing and searching will provide: <ul style="list-style-type: none"> ◦ infrastructure improvements to support more complex queries and speed up response time ◦ New PO Line attributes in the advanced search ◦ "OR" attribute while building and performing advanced search queries 	Improved overall experience and efficiencies in acquisition workflows

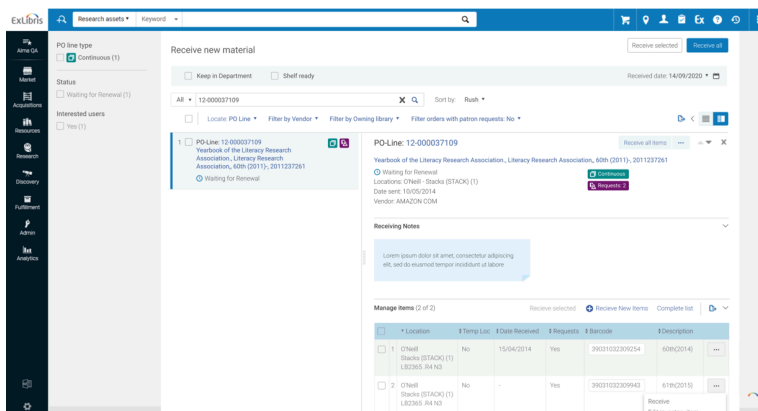
back to [Acquisitions Roadmap](#)

2022 H2 - 2023

Receiving Workbench - Enhanced UX

What's New	Highlights	Impact
The Receiving Workbench will be updated and redesigned for better usability, performance, productivity and overall user experience	<ul style="list-style-type: none"> • "Search before you work" option will save the users waiting time until the Receiving page loads 	Save users from unnecessary screen loading time and navigation to/from the receiving workbench

What's New	Highlights	Impact
	<ul style="list-style-type: none"> A new “side by side” presentation will save the users from having to access a designated page in order to review the items list Brief item editing will let users edit specific inventory item information without leaving the receiving workbench 	



back to [Acquisitions Roadmap](#)

Search Acquisition Entities by their Notes

What's New	Highlights	Impact
<p>Ability to search Acquisition entities by their associated notes.</p>	<p>Additional Advanced search options for searching the content of the 'Notes' tab will be added to the following entities:</p> <ul style="list-style-type: none"> PO lines Invoices Licenses 	<p>Users will be able to easily find PO lines, Invoices and Licenses by the content of their notes.</p>

back to [Acquisitions Roadmap](#)

EDI – Support for “Quantity for Pricing” and “Access Model”

What's New	Highlights	Impact
<p>When purchasing electronic resources, institutions will have support for sending various purchasing models to vendors</p>	<p>Institutions will be able to send the vendor, via EDI, information regarding the access needs for the ordered electronic resource: Quantity for pricing and Access model</p>	<p>More accurate information regarding the order will be sent to the vendor</p>

back to [Acquisitions Roadmap](#)