Alma Acquisitions Basics Training Series Curriculum and Plan

Objectives:
The Alma Acquisitions Basics Training (AABT) course will focus on developing and teaching best practices to assist campuses who are either not currently using Aleph (the LMS) for acquisitions or funds management or are relatively new to acquisitions to learn the fundamentals of acquisitions and applying these concepts to using Alma for acquisitions activities.

Overview:
The AABT will be a condensed cohort-model driven training series where campuses will focus on learning acquisitions fundamentals, completing projects outside of the training sessions, and applying concepts to directly implement in their Alma instances. The series will last 4 weeks, and involve 2 hours per week in webinars, with 1-2 hours per week of outside work. The first 3 ½ weeks will be focused on covering fundamentals and applying concepts in Alma, with the last session dedicated to an open Q and A.

Specific Tasks that Participants will be able to do when the AABT training is complete:
- Create a fund structure that is appropriate for the needs of their institution, and aligns with SLC needs for system-wide reporting and analysis.
- Map current acquisitions and fund management activities either not tracked in the Library Management System (Aleph) into the Library Services Platform (Alma), or critically analyze how they are using Aleph fund structures and identify areas where changes may be appropriate in Alma.
- Identify how acquisitions data and information is used in various workflows throughout Alma.
- Understand the fundamentals of library acquisitions (i.e. funds, purchase orders, orders, vendors, licenses) and apply how these acquisitions fundamentals should be configured and used in Alma.
- Assess and document current practices outside of the LMS or within the LMS and effectively map them into new workflows or structures in Alma.

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<th>Participants will be able to.....</th>
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<tr>
<td>Understand the fundamentals of acquisitions and apply these fundamentals to their current campus environment.</td>
<td>Campuses will develop a plan to map their current acquisitions and fund management practices into Alma.</td>
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<td>Identify how acquisitions connects to various workflows in Alma.</td>
<td>Campuses will demonstrate their understanding of acquisitions workflows and how they connect to fund structures and acq. Data. Campuses will reflect on the choices they make in creating funds.</td>
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<td>Identify the different acquisitions workflows for different item types and materials.</td>
<td>Individuals and libraries will demonstrate understanding by successfully placing test orders in different material types using test fund structure.</td>
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<td>Demonstrate understanding of acquisitions workflows and organizational structure.</td>
<td>Participants will present about local acquisitions transition strategy in a final presentation. Campuses will create test fund structure in Alma test environment.</td>
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**Mondays & Thursdays – Start Monday, February 11, 2019. 10:00 am**

Training Series Schedule:

### Week 1 - Maggie

**Sessions 1 and 2: Mapping Workflows and Building and Developing Fund Structures Appropriate for Your Institution**
- Documenting Current Workflows and Mapping to Future Workflows
- Overview of Fund Structures
  - Ledger
  - Funds
  - Summary Funds
- What Fund Structure is Appropriate for Your Institution?
- Overview of SLC Fund Structure Policies: AWG-1 and AWG-2

**Project Homework:**
- Create a document of what your fund structure will be in Alma. Explain why you chose the funds/fund structure you did.
- Provide a short summary of what policies and processes you currently have documented. Include who you need to involve documenting the current and future workflows and processes.

### Week 2: Alana

**Sessions 3 and 4: Connecting the Dots: Building Blocks of Acquisitions Processes**
- Vendor/Vendor Records
  - Review AWG-3
  - What information is needed/useful for vendors
  - Why and where are vendors important in the acq. Workflow?
- Purchase Order Lines (POL) and Purchase Orders (PO)
- Orders
  - Different methods of ordering

**Project Homework:**
Gather a spreadsheet of vendors you are currently using, including any relevant information needed to minimally enter these into Alma.

Enter 2-4 vendors into Alma.

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**Week 3**

Sessions 5 and 6: Review of Current Practices and Overview of Acquisitions as Building Block of Alma Tech. Services

**Session 5:** Maggie/Alana – discussion-based share our experiences/recommendations
  - Connecting Current Workflows to Acquisitions Workflows
  - Acquisitions in Alma
    - Overview of areas where Acq. is starting place for workflows in Alma

**Session 6:** - Maggie
  - Physical material ordering
    - Monograph (one-time order)
    - Subscription (orders with renewal)
    - Gift
    - Review AWG-5

**Project Homework:**
Map/document your current ordering workflows for at least 2 material types. Map how these workflows will be in Alma.

Provide information on where you’ll need Purchase Orders to package Purchase Order Lines.

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**Week 4**

Sessions 7 and 8 The different Acquisitions Workflows

**Session: 7 - Alana**
  - Electronic Material Ordering and activations
    - Managing licenses
Activating

- Workflow - Receiving + Claim lost
- Workflow - Invoicing

Session 8: Open Q&A – Maggie/Alana