A Selection of User Roles Related to Acquisitions

Configuration	
Acquisitions Administrator	Manages acquisitions configurations, such as PO review rules, reporting codes, and running acquisitions related jobs. Select **Read Only** to enable the user to view but not edit acquisitions configurations.
Fiscal Periods, Ledgers, and Funds	
Fiscal Period Manager	Manages copy ledger and editing of fiscal period tables when assigned in conjunction with the Acquisitions Administrator role.
Ledger Manager	Enables creating and editing ledgers, adding funds and allocations, performing transactions, and updating ledgers and funds.
Fund Manager	Manages all fund-related actions, including allocations and transactions, creating, updating, and closing funds.
Fund-Ledger Viewer	Views funds and ledgers only.
Vendors	
Vendor Manager	Manages all aspects of vendor records.
Vendor Account Manager	Manages the vendor account elements of vendor records.
Purchase Orders	
Purchasing Manager	Manages authoritative purchasing operations, such as reviewing and approving POs, activating electronic resources, assigning PO lines to purchasing operators, and linking licenses to PO lines. Can also view vendor data, ledgers and funds, and invoices. Can create and edit holdings by scope. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record.
Purchasing Operator	Manages all purchasing operations, including creating, reviewing, and updating PO lines, reassigning PO lines to other purchasing operators, managing electronic resources, and linking licenses to PO lines. Can also view vendor data, ledgers and funds, and invoices. Can create and edit holdings by scope. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record.

Purchasing Operator Extended	Can delete PO lines. Must be combined with Purchasing Operator.
Activating Electronic Inventory	
CDI Inventory Operator	When the CDI model is set to the Fully Flexible activation model, users with this role can activate or deactivate a CDI electronic collection, remove the CDI-only full text activation, and edit fields in the CDI tab in the Electronic Collections Editor. This role can be set independently or used in combination with the Electronic Inventory Operator. When the two roles are combined, users can, when using the Activation Wizard, set the CDI search activation and full text activation with a single action.
Electronic Inventory Operator	Manages the institution's electronic inventory, including adding local electronic collections, and local portfolios, managing electronic resource activation, and creating and managing sets. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. Manages the institution's electronic inventory, including adding local electronic collections, and local portfolios, managing electronic resource activation, and creating and managing sets. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record.
Electronic Inventory Operator Extended	Can delete electronic inventory. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. Must be combined with Electronic Inventory Operator.
Receiving Physical Inventory	
Receiving Operator	Manages the arrival of both physical and electronic purchased items. A service unit must be assigned when configuring this role.
Receiving Operator Limited	Has Receiving Operator privileges but cannot delete orders. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. A service unit must be assigned when configuring this role.
Invoices	
Invoice Manager	Manages invoice creation, review and approval activities, and assigning invoices to other operators.
Invoice Operator	Creates, edits, and reviews invoices. Reassigns invoices to other invoice operators.

Invoice Operator Extended	Can delete invoices. Must be combined with Invoice Operator.
Analytics	
Analytics Administrator	Enables configuring analytics and exposing analytics to other staff operators.
Designs Analytics	Enables creating analytics reports.
Cataloging	
Cataloger	Performs cataloging activities for bibliographic, holdings, and authority records, and creates and manages sets. When deleting the last item associated with a bibliographic record, can also delete that bibliographic record. Can manage normalization rules. *Assign to **Purchasing Operators** so they can create new records in the MD editor via Search Resources and templates.*

Term	Definition
Acq	Acquisitions
API	*Application Programming Interface* that allows Alma and other systems such as an ERP to interact or communicate
Approval	Process of confirmation that a PO line is approved for ordering, or an invoice is approved for payment
CDI	Central Discovery Index
CZ	Community Zone
EDI	*Electronic Data Interchange* is the concept of businesses electronically communicating information that was traditionally communicated on paper, such as purchase orders and invoices
EOD	*Embedded Order Data* enables automatic creation of purchase orders with via bulk import based on data in vendor-supplied MARC records
ERP	*Enterprise Resource Planning* systems, usually the finance system at an institution
Fiscal Period	A period of time, usually a year in length, during which a ledger/fund structure is valid for use (eg 1 Jan – 31 Dec; 1 Jul – 30 Jun)
Fund	Budgets used for funding acquisitions activities Funds are aggregated in a ledger
Inventory	Resources owned, licensed by, or associated with a library, institution or consortium; may include physical holdings and items, electronic portfolios, digital representations, and deposits
Invoice	One or more invoice lines acknowledging payment for resources ordered
Invoice Line	One or more copies of electronic or physical resources being paid for by a library
IZ	Institution Zone
Ledger	Collection of funds relevant for a fiscal period

Material Type	Type of material, such as an electronic journal collection or book, from which the item takes its form
NZ	Network Zone
Purchase Order	One or more PO lines sent to a single vendor Often referred to as a PO
Purchase Order Line	One or more copies of electronic or physical resources to be purchased by a library Often referred to as a PO Line
Reporting Code	Used for analyzing acquisitions in subsequent reporting
Vendor	A supplier of electronic services or physical goods
Vendor Account	A subset of the vendor account that is used to distinguish among types of resources acquired from a vendor
Vendor Interface	A group of electronic collections such as Alexander Street Press or Ebook Central offered by ProQuest