



The State University of New York

# Advanced Acquisitions: New Order API

Maggie McGee & Susan Perry  
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[www.suny.edu](http://www.suny.edu)



# New Order API

- Alma provides for real-time ordering by enabling vendors to integrate their ordering system with Alma's repository and ordering features
- Real-time order data is sent automatically to Alma from the vendor's system using Alma's APIs
- New Order APIs provide libraries with the ability to automate the creation of new orders (Purchase Order Lines - POLs) and add bibliographic records and inventory to either the Institution Zone (IZ) or Network Zone (NZ), and link ebooks to the Community Zone (CZ) when ordering with GOBI or Proquest
- Real-time ordering:
  - Speeds up the availability of resources
  - Increases the efficiency of integrating records
- Reduces manual handling:
  - Creating POLs (order records) and inventory
  - Overlaying bib records
  - Merging records



# How New Order APIs Work

- New Order APIs can be added to Alma via a new order API integration profile
- New Order APIs require an API key to be used
- New Order APIs use an API Restrictions integration profile in conjunction with a New Order API integration profile to limit the vendor's ability to access fund information
  - API Restrictions do not require an API key
  - API Restrictions are assigned to an API key by the Vendor selected
- New Order APIs can only have one New Order API integration profile and API key per vendor
- New Order APIs can be configured to match records to the Institution Zone (IZ) or the Network Zone (NZ)
  - Upon no match new bib records can be added to the Institution Zone or the Network Zone based on how the new order API integration profile is configured
- New Order APIs do not have a filter to prevent electronic resources from being added to the Network Zone
  - Ex Libris currently has no plans to enhance integration profiles to add a filter, instead the ability to match eBooks to the Community Zone (CZ) has been developed
  - SUNY does not add e-resources to the NZ



# How New Order APIs Work

- New Order APIs do not run a job and they do not create a job history
  - An analytics report must be created to view Purchase Order Line (POLs) Records history
- Price changes, discounts, and shelf-ready cataloging charges must be either manually entered in the POL or updated automatically via an EDI import
  - The vendor needs to be contracted to configure EDI invoicing
- E-resources need to be activated after they are imported into Alma
- POLs go into Auto-packaging
  - PO and Fund mapping will appear the next day about the Auto-packaging jobs runs at night
- OASIS (January 2020) and GOBI (July 2020) are the only new order APIs that has the capability of matching e-books to the Community Zone (CZ)
  - The correct ebook collection must be activated in Alma for ebooks to match in the CZ



# SUNY New Order API Policy

## **Policy:**

- The OASIS and GOBI New Order API integration profiles can be configured to the NZ because eBooks are able to be matched to Community Zone (CZ) records
- All other vendors MUST configure their New Order APIs to the Institution Zone (IZ) because at the present time they are unable to match eBooks to the Community Zone (CZ)
- All other vendors' New Order API integration profiles can be configured to the Network Zone (NZ) once they have worked with Ex Libris to be able to match eBooks to the Community Zone (CZ)
- All New Order API integration profiles MUST add records “upon no match” to the Institution Zone (IZ) if they are configured to the NZ regardless of vendor

## **Recommendations:**

- Libraries using automated ordering processes should sync their holdings with ordering vendors such as Oasis/ProQuest or Gobi/YBP
- Records added to the Institution Zone (IZ) should be manually linked to the Network Zone (NZ) or Community Zone (CZ) based upon resource type



# Configuring GOBI New Order API in Alma

- GOBI New Order API does not have a service charge due to an agreement between GOBI and SUNY
- The SLSS will:
  1. Work with interested SUNY libraries to configure the tech specs for GOBI and configure the GOBI New Order API in Alma
  2. Work with GOBI to implement New Order API tech specs
  3. Troubleshoot initial set-up and configuration



# Import Profiles vs. API

Functionality	Import Profile	API
Import Electronic Order Records (EOD) & Creates Inventory	Yes	Yes
Import MARC Records With or Without Inventory	Yes	No
Use Full MARC Records	Yes	No
Use Brief Bib Records	Yes	Yes
Links E-Resources to Existing CZ Records (E-Resources)	Yes	Yes (Proquest/GOBI)
Use CZ Bib Records	Yes	Yes
Use Imported MARC Record Instead of CZ Record	Yes	No
Activate E-Resources After Import Automatically	Yes	No
Delete Bib Records	Yes	No
Real Time Ordering	No	Yes
Additional Cost	Ask Vendor	No (Proquest/GOBI)
Creates a Report History in Alma	Yes	No



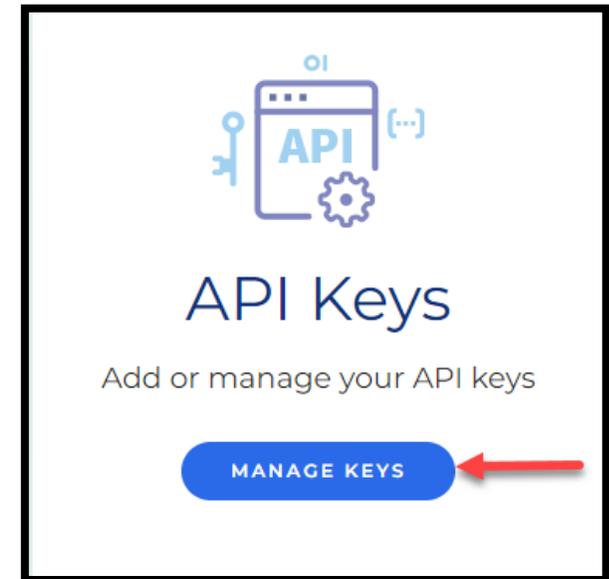
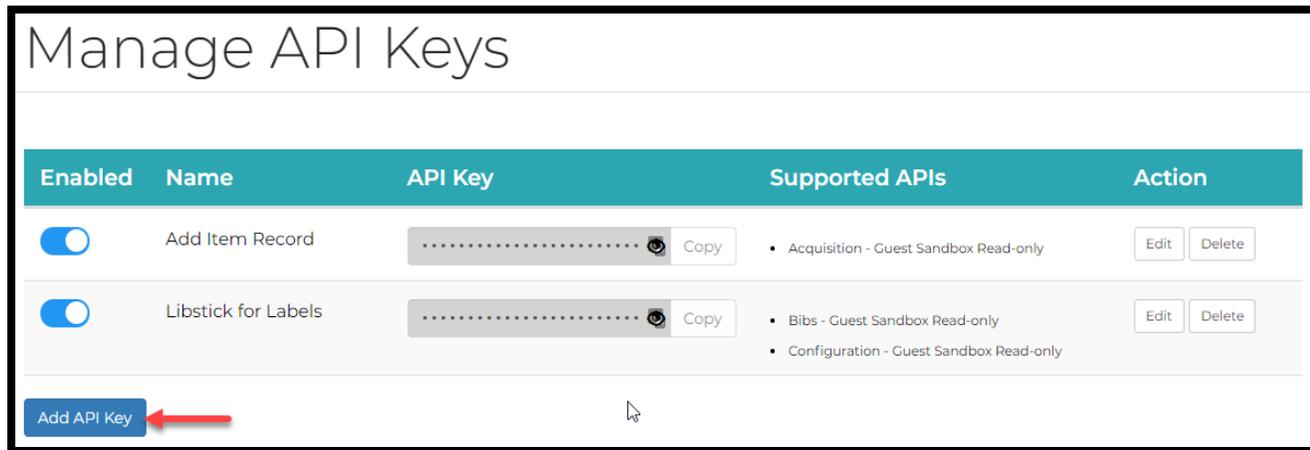
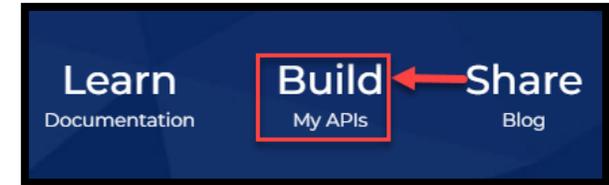
# Steps to Implement a New Order API

1. Create a New Order API Key
2. Contact the vendor
  1. Set up tech spec
  2. Provide Vendor with the API key
3. Configure New Order API in Alma
4. Configure API Restrictions in Alma
5. Place a small initial order to make sure mapping works properly



# Create a New Order API Key

1. Login to Ex Libris' Developers Network: <https://developers.exlibrisgroup.com/login/>
  - Use the institution username/password
2. Click **Build My APIs>Manage Keys**
3. Click **Manage Keys**
4. Click **Add API Key**



# Create a New Order API Key

1. Fill out:
  - **Name:** [Type “Vendor New Order Integration”]
  - Description: [Optional]
  - **Enabled:** [Must be enabled]
  - Save detailed log files: [Leave disabled]
  - Allowed IP Range: [Optional]
  - Restriction Profile code: [Optional]
2. Click **Add Permissions**
  1. Area: [Select **Acquisitions**]
  2. Env: [Select Production]
  3. Permissions: [Select Read/Write]
3. Click **Save**

The screenshot shows the 'Add/Edit API Key' form with the following fields and values:

- Name:** GOBI New Order Integration
- Description:** [Empty]
- Enabled:**
- Save detailed log files:**
- Allowed IP Range:** Optional - Only requests within the IP Range will be allowed. CIDR format (Example: 1.2.3.4/32)
- Restriction Profile code:** Optional - the code of the Integration Profile which limits access to specific vendors.

**Permissions Table:**

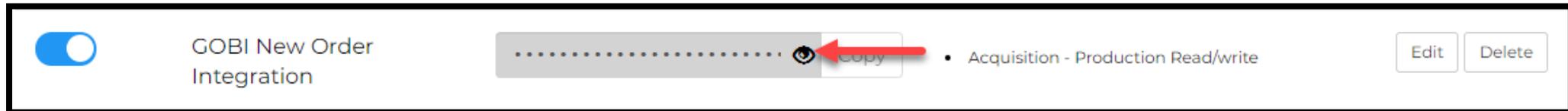
Area	Env	Permissions	Action
Acquisition	Production	<input type="radio"/> Read-only <input checked="" type="radio"/> Read/write	Delete

Buttons: Add Permission, Save, Cancel

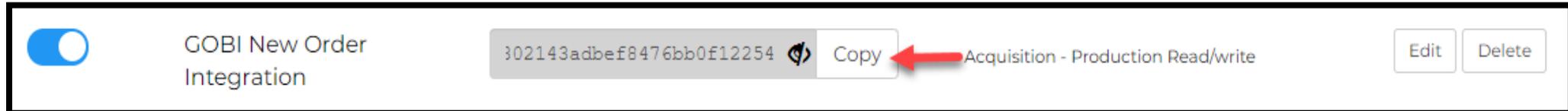
# Copy the New Order API Key

Copy API key:

1. Click on the "**eye**" icon from the LIBstick API in **Manage Keys**



2. Click "**Copy**" from the Vendor New Order API



3. Provide the API key to Vendor

# Contact Vendor

1. Contact the vendor
2. Provide vendor with technical requirements:
  - Vendor accounts to be associated with New Order API
    - Vendor accounts must be in the vendor details under ***Acquisitions>Acquisition Infrastructure>Vendors***
  - Fund mapping
  - Other mapping information
3. Review tech specs
4. Vendor will configure the test specs and test accessing Alma without an order
5. Troubleshoot as necessary



# Example of GOBI Form to Create Tech Specs

**GOBI Library Solutions-Ex Libris Alma GobiAPI Setup Information**

Date: 1/6/2020 Base Acct: Primary Vendor Account  
 Requested by: Requesters Name Library: Library Name  
 Alma Base Path (select) https://api-na.hosted.exlibrisgroup.com  
 API Key API Key

		Alma Data			
Subaccount	Subaccount description	US or UK	PO line owner (code)	Vendor code	Account code
<u>Account Number</u>	<u>Description of Account</u>	<u>US</u>			

Add as many accounts for the vendor that will use new order API for ordering
Owning Library Code
Vendor Code in Alma
Matches the Subaccount number

**Also supply:**  
 API is sensitive to upper/lower case  
 List of location & library codes\* (or confirm we should use the existing validation list from your GobiSmart setup)  
 List of fund codes\* (or confirm we should use the existing validation list from your GobiSmart setup)

\*only ones that will be used in GOBI orders, not your whole list

**Valid Alma Base Paths By Region:**  
**America:** https://api-na.hosted.exlibrisgroup.com  
**Europe:** https://api-eu.hosted.exlibrisgroup.com  
**Asia Pacific:** https://api-ap.hosted.exlibrisgroup.com  
**Canada:** https://api-ca.hosted.exlibrisgroup.com  
**China:** https://api-cn.hosted.exlibrisgroup.com

Setup Basics
GobiSmart-API mappings
Fund Code mappings
+

# Example of GOBI Form to Create Tech Specs

**Alma API: Local Data Mapping from GOBI to API**

Date: 1/6/2020 Base Acct: 0 Primary Vendor Account Number  
 Requested by: Requestor Library: 0 Library Name

GOBI Field	Displayed?	GobiSmart Label	Alma API Field	Notes
PO Number	Yes	PO Number	Do Not Output	Reserved for collection and display of returned POL
Fund Code	Yes	Fund Code	Fund Code	
Initials	Yes	Initials	Do Not Output	
Note to GOBI	Yes	Note to YBP	Do Not Output	
Other Local ID	No	Other Local ID	Do Not Output	
Location	Yes	Location	Shelving Location	
Local Data 1	Yes	Library	Library	
Local Data 2	Yes	Library Notes	Notes (multiples allowed)	
Local Data 3	Yes	Notify Upon Arrival	Notes (multiples allowed)	
Local Data 4	Yes	Local Data 4	Do Not Output	
Subaccount	Yes	Subaccount	Do Not Output	
Purchase Option	Yes	Purchase Option	Do Not Output	

**Notes:**

- Start with the library's current GobiSmart setup
- If any GobiSmart changes required, be sure to note in column E
- Inca only shows the GOBI field if the field is displayed in the library's GOBI order screen
- If GOBI field is not displayed, mark as "Do not output" in the Alma API field
- Multiple GOBI fields can map to the Notes field.
- When generic Notes are sent, they will be sent as repeating notes field with the GobiSmart label as a prefix to each one
- Location and Local Data 1 are the most common sources for Library and/or Shelving Location

Setup Basics **GobiSmart-API mappings** Fund Code mappings (+)





# Configuring a New Order API in Alma

Required role:

- General System Manager

To configure New Order API in Ama

1. Go to **Configuration>Acquisitions>General>External Systems>Integration Profiles**
2. Click **Add Integration Profile**

Integration Profile List

1 - 14 of 14 Name [Search]

+ Add Integration Profile

Integration Type : All

Name	Code	Description	Integration Type	Manage in Network	Updated By	Status Date
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# Configuring a New Order API in Alma

3. Page 1 of the Integration Profile screen opens
  1. Use network zone: [Keep checked if configuring for GOBI or Proquest, otherwise uncheck it]
  2. Code: [Type a New Order API code]
  3. Name: [Type the name of the New Order API]
  4. Integration Type: [Select New Order API]
  5. System (for Ex Libris' informational purposes): [Select the System, if system does not exist, select Other]
  6. Default: [Check the box]
  7. Description: [Optional]
  8. Click **Next**

The screenshot shows the 'Integration Profile' configuration screen in Alma. The form includes the following fields and annotations:

- Use network zone:** A checkbox that is checked. A red box highlights it, and a green callout box points to it with the text: "GOBI and Proquest can use the Network Zone. All other vendors should uncheck this box and use the IZ".
- Code \*:** A text input field containing "GOBINEWORDER".
- Integration Type \*:** A dropdown menu set to "New Order API".
- Default:** A checkbox that is checked.
- Description:** A text input field containing "Optional".
- Name \*:** A text input field containing "GOBI New Order API".
- System (for Ex Libris' informational purposes) \*:** A dropdown menu set to "GOBI YBP". A red box highlights it, and a green callout box points to it with the text: "Use Other is the System is not in the drop-down menu".

At the top right, there are two progress indicators (1 and 2) and two buttons: "Cancel" and "Next".

# Configuring a New Order API in Alma

3. Page 2 of the Integration Profile screen opens
  - Normalization:
    1. Correct the data using: [Select SUNY NZ OCLC Import]
  - Validation:
    1. Handle invalid data using: [Use the default “MarcXML Bib Metadata Editing on Save”]
  - Match:
    1. Serial match method
    2. Non serial match method
    3. Upon no match
    4. Prefer record with the same inventory type



# Configuring a New Order API in Alma

Integration Profile

1 — 2 Cancel Back Save

**NORMALIZATION**

Correct the data using  **For New Order Integration Profiles that use the NZ, select "SUNY NZ OCLC Import"**

**VALIDATION**

Handle invalid data using  **Use default**

**MATCH**

Serial match method  **Use ISSN / 024 / 035 Match Method and ISBN / 024 / 035 Match Method**

Non Serial match method

Upon no match  Add To NZ  Import To IZ **Upon no match ALWAYS select "Import to IZ" - records imported to the IZ will need to be linked to the NZ or the CZ**

Prefer record with the same inventory type (electronic/physical)  **Check this box to match on the same inventory type**



# Configuring a New Order API in Alma

- Page 2 continued of the Integration Profile screen opens
  - Management Tags:
    - Synchronize with External Catalog: [Keep default “Don’t publish”]
  - Validation of Order Information
    - Uncheck any or all of the boxes if you want the New Order API to ignore fund information
- Click **Save**

The screenshot displays the 'MANAGEMENT TAGS' section with a dropdown menu for 'Synchronize with External Catalog?' set to 'Don't publish'. A red arrow points from a callout box to this dropdown. Below, the 'VALIDATION OF ORDER INFORMATION' section has three checkboxes checked: 'Order is not fully funded', 'Invalid fund code', and 'Fund balance insufficient to cover encumbrance'. A red arrow points from a second callout box to these checkboxes.

**MANAGEMENT TAGS**

Synchronize with External Catalog? \*  ▼

**VALIDATION OF ORDER INFORMATION**

Do not create order in case of:

Order is not fully funded

Invalid fund code

Fund balance insufficient to cover encumbrance

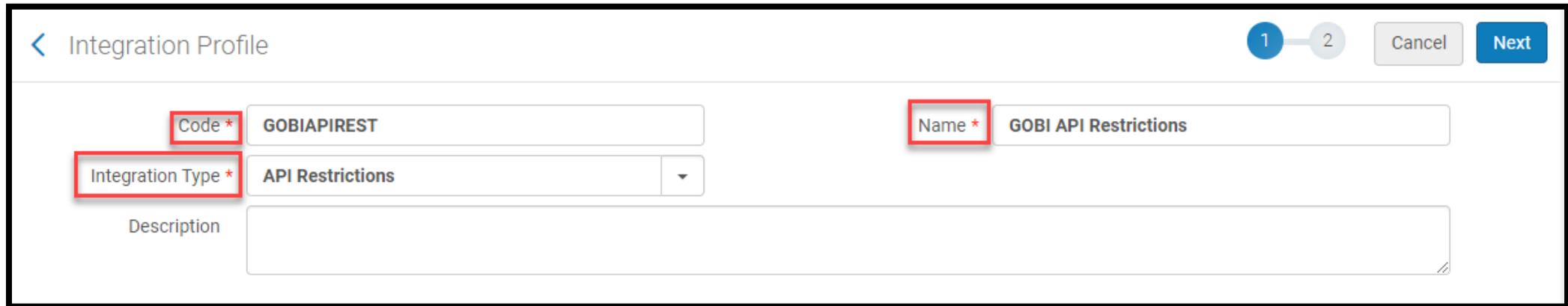
**Callout 1:** Select "Don't Publish" - update the Set Management tags upon receipt of the physical title. SUNY does not publish E-resources to OCLC from Alma

**Callout 2:** Uncheck any or all of the boxes if you want the New Order API to ignore fund information upon import for new orders

# Create API Restriction

To configure an API Restriction in Ama

1. Go to **Configuration>Acquisitions>General>External Systems>Integration Profiles**
2. Click **Add Integration Profile**
3. Page 1 of the Integration Profile opens
  1. Code: [Type code]
  2. Name: [Type the API Restriction Name]
  3. Integration type: [Select API Restrictions]
  4. Description: [Optional]
  5. Click **Next**



The screenshot shows the 'Integration Profile' configuration form. At the top left is a back arrow and the title 'Integration Profile'. At the top right are two step indicators (1 and 2), with '1' highlighted in blue, and 'Cancel' and 'Next' buttons. The form contains four fields: 'Code \*' with the value 'GOBIAPIREST', 'Name \*' with the value 'GOBI API Restrictions', 'Integration Type \*' with a dropdown menu showing 'API Restrictions', and a 'Description' text area which is currently empty.

# Create API Restriction

To configure an API Restriction in Ama

4. Page 2 of the Integration Profile opens
  1. Acquisitions:
    1. Vendor: [Select the vendor]
    2. Fund(s) view: [Select Brief]
5. Click **Save**

The screenshot shows the 'Integration Profile' configuration page. At the top right, there are two progress indicators (1 and 2), a 'Cancel' button, a 'Back' button with a red arrow pointing to it, and a 'Save' button. The main section is titled 'ACQUISITIONS'. It contains a 'Vendor \*' field with the value '315' and a 'Fund(s) view \*' field with radio buttons for 'Full' and 'Brief', where 'Brief' is selected. Below these fields, there is a note: 'Connecting an API key to this profile is done as part of API key management in Developer Network'.

# Using New Order APIS

1. Order via vendor system
  - The first order should be small to test the API works as expected
2. Vendor sends order records to Alma via new order API
3. Records are configured to be imported to the IZ upon no match for GOBI and Proquest
  - All other vendors are configured to import records to the IZ
4. POLs created
  1. POLs will go into review if configured for POLs to be reviewed (***Acquisitions>Purchase Order Lines>Review***)
  2. Approve POLs clicking "***Order Now***"
5. PO created
  1. Auto-packing job runs overnight to package the orders under one PO if the job is activated
  2. Funds should be reflected in the POL after the auto-packaging job runs
6. Update POL pricing either:
  1. Manually
  2. EDI invoice



# Using New Order APIS

7. Receive/Activate resources
  1. Physical resources are received (**Acquisitions>Receiving and Invoicing>Receive**)
  2. eBooks need to be activated. eBooks waiting to be activated will appear in tasks
8. Link records added to the IZ to the:
  1. Network Zone (NZ) for physical resources
    1. Need to add OCLC numbers to brief bibs that do not contain an OCLC number
    2. Use Share with Network to link them to the NZ or link a set of records to the NZ using the “Link a set of records to the Network Zone” job (**Admin>Manage Jobs and Sets>Run a Job**)
  2. Community Zone (CZ) for eBooks
    1. Click “**Link to Community**” when activating the eBook



# Supporting Documentation



# Supporting Documentation

## SUNY SLSS:

- SLSS Libguide: [New Order APIs](#)

## Ex Libris:

- [External Systems](#)
- [For Institutions: Setting up a real-time acquisitions workflow with participating vendors](#)
- [Working with API Restrictions](#)
- [Real Time Ordering](#)

