



# Alma Acquisitions: Revisit & Review

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## Information gathered from--

- **Campus site visits**
- **Extended Support campuses**

*How can we streamline the ordering (or, invoicing) process?*

*What is needed to move from "technical" acquisitions?*

*Right now, we're entering just our book orders.*

*We're entering print orders, but not electronic orders.*



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## **Timeline --> July 2019 to May 2020**

Better understanding of the effects of Aleph-migrated items;

More familiarity with Alma;

Workflows incorporated throughout the library; or, new staff users have arrived; or, staff users have left.

## Timeline --> May 2020 to ???

Start from wherever YOU are.

Figure out your next step.

7/1/2020 fiscal year?

9/1/2020 fiscal year?

## Making the most of Alma acquisitions

In order to use ALL ("full") acquisitions features and functions in Alma, you'll need:

- 1 - at least one fund structure (ledger, summary fund, child fund, allocated fund), and;
- 2 - one vendor record.



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## The Good News

In order to use ALL ("full") acquisitions features and functions in Alma, you'll need:

- 1 - at least one fund structure (ledger, summary fund, child fund, allocated fund) -----> **we can help with that!**
- 2 - one vendor record -----> **needed for "technical," anyway**



Save the bees!

## Getting help to get things going

- [Online acquisitions course](#) – June 23 through June 29
- Recordings of online acquisitions course – after June 30
- Custom consulting services
- [Submit support ticket](#) (available bank of 5 support hours per campus)
- [Basecamp HQ posting](#) – let me know if you're not a member
- [Alma & Primo VE Training](#) - documentation, FAQs, etc.
- [Fiscal Year Rollover in Alma](#) – Maggie McGee – June 4



## Designed to make your life easier

- Order templates – same vendor, same fund, etc.
- Ordering print and electronic versions of the same title.
- Orders without inventory – track "other" internal expenses.
- Order and invoice at the same time.
- Receive and barcode/process at the same time.

## Designed to make your life easier – cont'd

- "Renew" subscriptions automatically.
- Create expected issues for periodicals.
- Reporting codes – instead of complicated fund structure
- Shortcuts for gifts, donations, etc.
- Order APIs from vendors – GOBI/OASIS



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## **Collection Development meets Resource Management meets Acquisitions**

Orders are initiated from repository records.

In general—

Print records from the NZ

Electronic records from the CZ

Consider (ponder, brainstorm) ways that your current “offline” purchase/selection system can be adapted to Alma acquisitions workflows.

## The pay-off

- Actual budget balances
- Detailed reporting – analytics
- e-resource management
- Coordinated collection development opportunities

# Recordings



## 2020 Best of Ex Libris Knowledge Days Webinar Series

Be sure to check the time zone below (next to the language option) to make sure the webinar times display in your local time zone.

English : [New York Time](#)

<input type="checkbox"/> Show past events				
<b>Upcoming Events</b>			Total number of events: 2	
<input type="checkbox"/>	<a href="#">Date &amp; Time</a> ▾	<a href="#">Event</a>	<a href="#">Panelist</a>	
<input checked="" type="checkbox"/>	May 28, 2020 11:00 am	<a href="#">Effective Usage of Primo Analytics Reports and Dashboards - EMEA/NA</a>	Open Registration	<a href="#">Join</a>
<input type="checkbox"/>	May 28, 2020 8:00 pm	<a href="#">Effective Usage of Primo Analytics Reports and Dashboards - APAC</a>	Open Registration	
<a href="#">Register</a>				

<b>Event Recordings</b>					Total number of recordings: 8
<a href="#">Date</a> ▲	<a href="#">Topic</a>	<a href="#">Panelist</a>	<a href="#">Duration</a>	<a href="#">Size</a>	
May 21, 2020	<a href="#">APIs and Integrations for the Non-Technological - EMEA/NA-20200521 1501-1</a>		1 hour 1 minute	50.9 MB	<a href="#">View</a>
May 20, 2020	<a href="#">Explore Alma Analytics for Fulfillment - EMEA/NA-20200520 1500-1</a>		1 hour 6 minutes	80.8 MB	<a href="#">View</a>
May 18, 2020	<a href="#">Intro to Primo Analytics - EMEA/NA-20200518 1501-1</a>		1 hour 1 minute	74.6 MB	<a href="#">View</a>
May 14, 2020	<a href="#">Letter Configuration and XSL Customization - EMEA/NA-20200514 1459-1</a>		57 minutes	50.1 MB	<a href="#">View</a>
May 13, 2020	<a href="#">Managing Electronic Resources: Advanced Topics - EMEA/NA-20200513 1459-1</a>		1 hour 2 minutes	67.5 MB	<a href="#">View</a>
May 11, 2020	<a href="#">Investigate Alma Analytics for Acquisitions - EMEA/NA-20200511 1500-1</a>		1 hour 1 minute	80.7 MB	<a href="#">View</a>
May 7, 2020	<a href="#">Reveal Alma Analytics for Resource Management - EMEA/NA-20200507 1500-1</a>		59 minutes	75.6 MB	<a href="#">View</a>
May 6, 2020	<a href="#">Using Alma Analytics to Perform Overlap Analysis &amp; Deselection - EMEA/NA-20200506 1404-1</a>		54 minutes	83.6 MB	<a href="#">View</a>
					Password required

Example -- cost changes of subscriptions



# Questions? Discussion

[Alma Acquisitions Training Guide](#)

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