

Review of Current Practices
&
Overview of Acquisitions as Building Block of
Alma Technical Services

Week 3 | Session 5
February 25, 2019

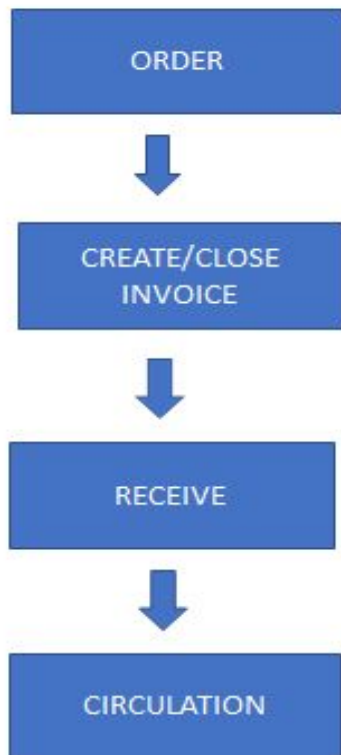
topics for today's session:

- acquisitions in the Alma environment
- connecting (or revamping) current workflows
- acquisitions as the starting point for many other workflows in Alma
- a look into Analytics and additional configurations

let's talk about workflows

- what works well in your current acquisitions workflow?
- what could be improved?
- what processes are you conducting manually or outside Aleph that Alma can handle or assist with?
- which Alma functions will enhance the way your library is currently handling acquisitions?
- how do you anticipate your workflows changing?

Oneonta's Aleph Acquisitions Workflow



- Ordering
 - Place order through vendor system
 - Import an OCLC record from OCLC or GOBI into Aleph
 - Create an order record in Aleph
- Create an invoice
 - Receive invoice from vendor
 - Create and close an order record in Aleph manually or using EDI
 - Manually send the invoice to financial department to be paid
- Receive
 - Review item's condition
 - Add barcode to the item record
 - Catalog
 - Review the bib record
 - Overlay the bib record when local fields are added or changes made to the OCLC record
 - Overlay the bib record if incorrect record was initially imported
 - Make changes to the holdings record
 - Location
 - Call number
- Send to circulation to be scanned and shelved

Oneonta's Alma Acquisitions Workflow



- Ordering
 - Place order through vendor system
 - Order item from the NZ bib record
 - Import bib record into the NZ if there is no record
 - Create an POL in Alma
- Create/Close an invoice
 - Receive invoice from vendor
 - Create and close an invoice in Alma manually or using EDI
 - Create Invoice lines
 - Manually send the invoice to our financial department to be paid
- Receive
 - Review item's condition
 - Edit the item record
 - Barcode
 - Material type
 - Item policy
 - Location
 - Temporary location
 - Catalog
 - Review the bib record
 - Overlay the bib record if the incorrect record was used for ordering
 - Add local notes
 - Make changes to the holdings record
 - Call number
- Send to circulation to be scanned and shelved

Onetona's Workflows: Aleph versus Alma

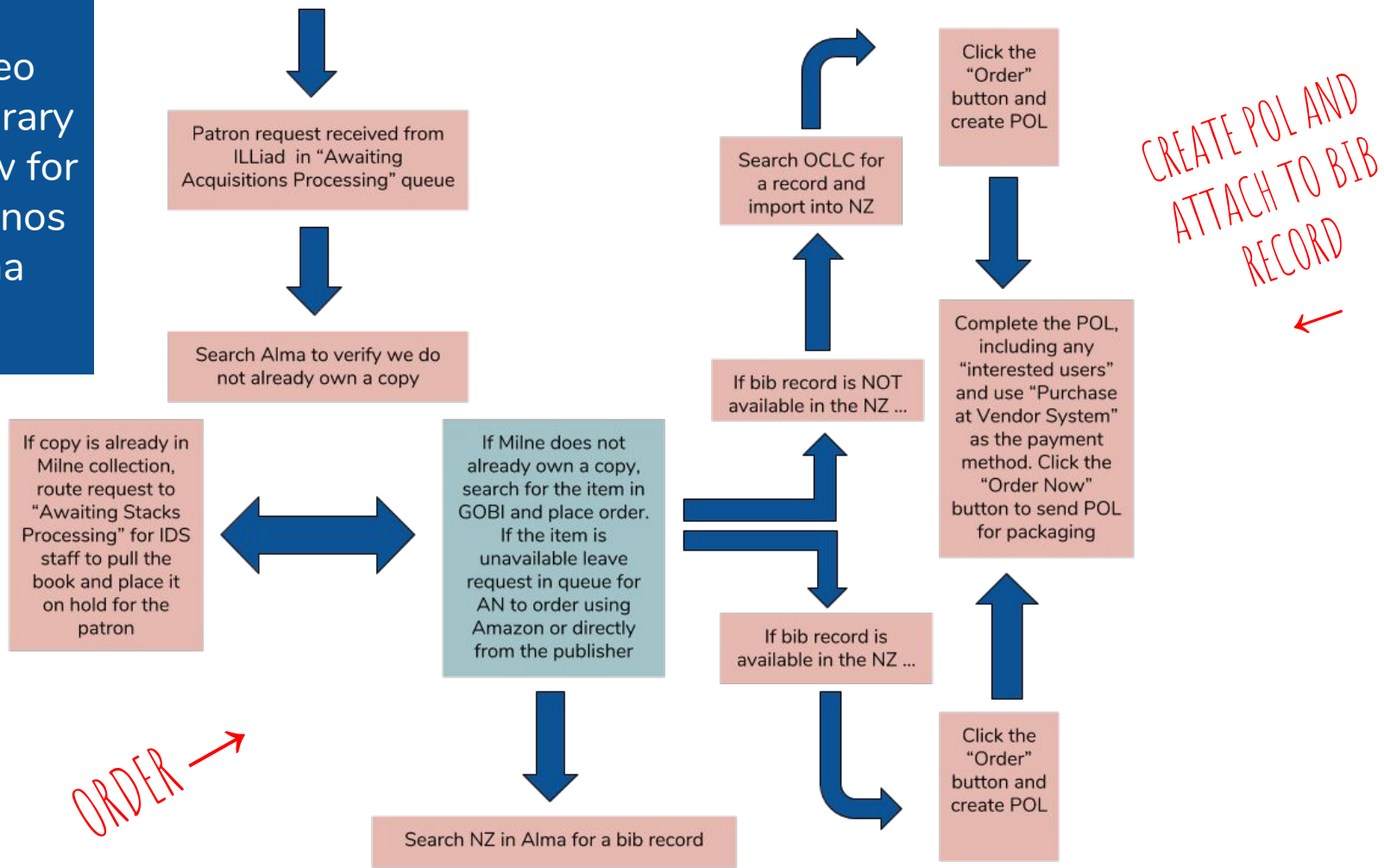
SAME:

- Importing OCLC record to order
- Ordering
 - Through vendor
 - Creating order record (Aleph)/POL (Alma)
- Invoicing
 - Creating and Closing an invoice
- Reporting
 - Expenditure & Commitments
- Scanning item
 - By Circulation to be shelved

DIFFERENT:

- Importing OCLC to the NZ
- Creating an Order in Alma from the NZ
- Receiving
 - Item Processing
 - Workflow
 - Location
 - Cataloging
 - Bib records
 - Holding Records
- Automatic patron notifications (“interested users”)

Geneseo Milne Library Workflow for Print Monos in Alma





Receive item:
Search by title in Alma to retrieve the POL
Attach and add barcode to the record and POL
Update OCLC holdings
Complete end processing

Bring book to Circulation desk for shelving or hold shelf



Create invoice in Alma from PO

Update any invoice lines with updated pricing or funds as needed
Upload scanned vendor invoice to Attachments

Save and Continue



Update the Payment status of the invoice to "paid" and add the invoice number as the Payment identifier.

Save



Scan vendor invoice

Bring print invoice to Admin Office for payment

CREATE &
CLOSE INVOICE



RECEIVE



Geneseo Workflows: Aleph versus Alma

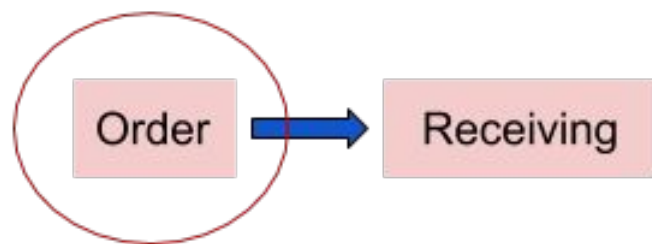
SAME:

- Order placed with vendor; payment made with library admin office
- Patron requests received via ILLiad
- End processing workflow

DIFFERENT:

- Using a system!
- PO and POLs
- Invoicing
- Automatic patron notifications (“interested users”)
- Using the NZ for bib records
- Task list
- Ability to track expenditure and generate reports - without frustration!

PRINT: ONE-TIME AND CONTINUOUS



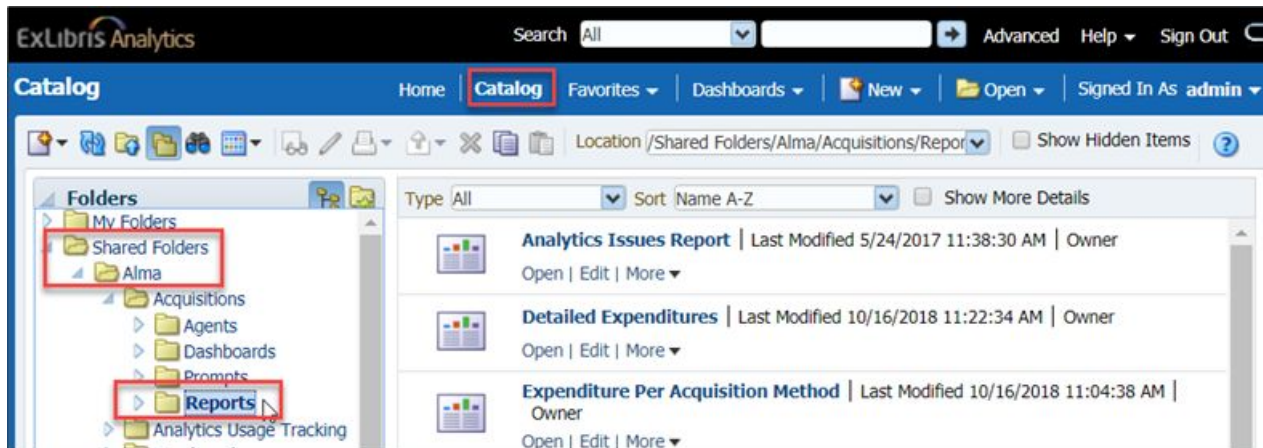
ELECTRONIC: ONE-TIME AND CONTINUOUS



The ordering process with its associated funds, material types, and reporting codes paves the way for robust reporting in Analytics and tracking of encumbrances and expenditures.

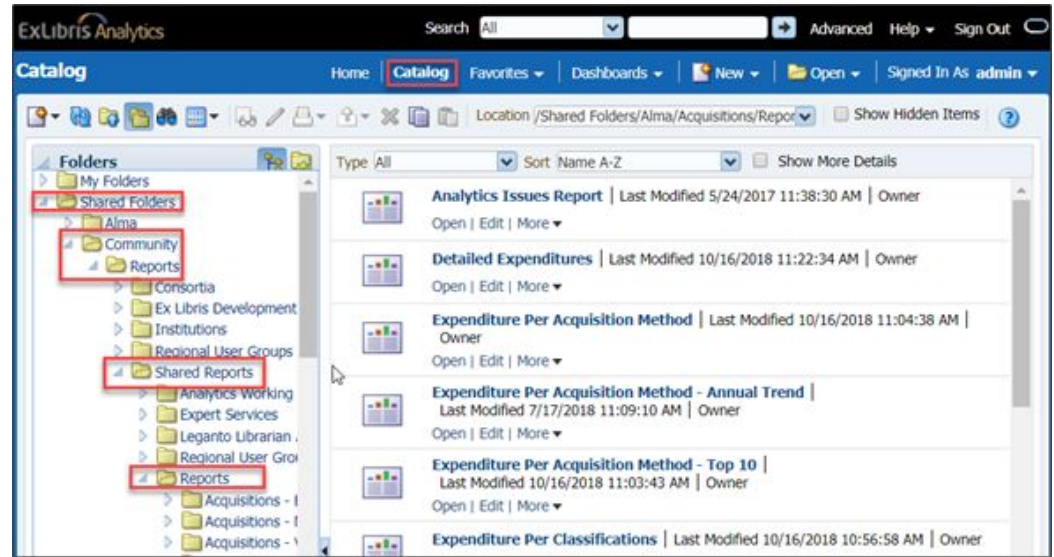
Using Analytics in Alma to Support Acquisitions

- Use existing reports created by ExLibris
 - Go to **Analytics>Analytics>Design Analytics**
 - Click **Catalog**
 - Click the **Alma** folder for reports created by ExLibris
 - Click on the **Acquisitions** folder
 - Click on the **Report** folder



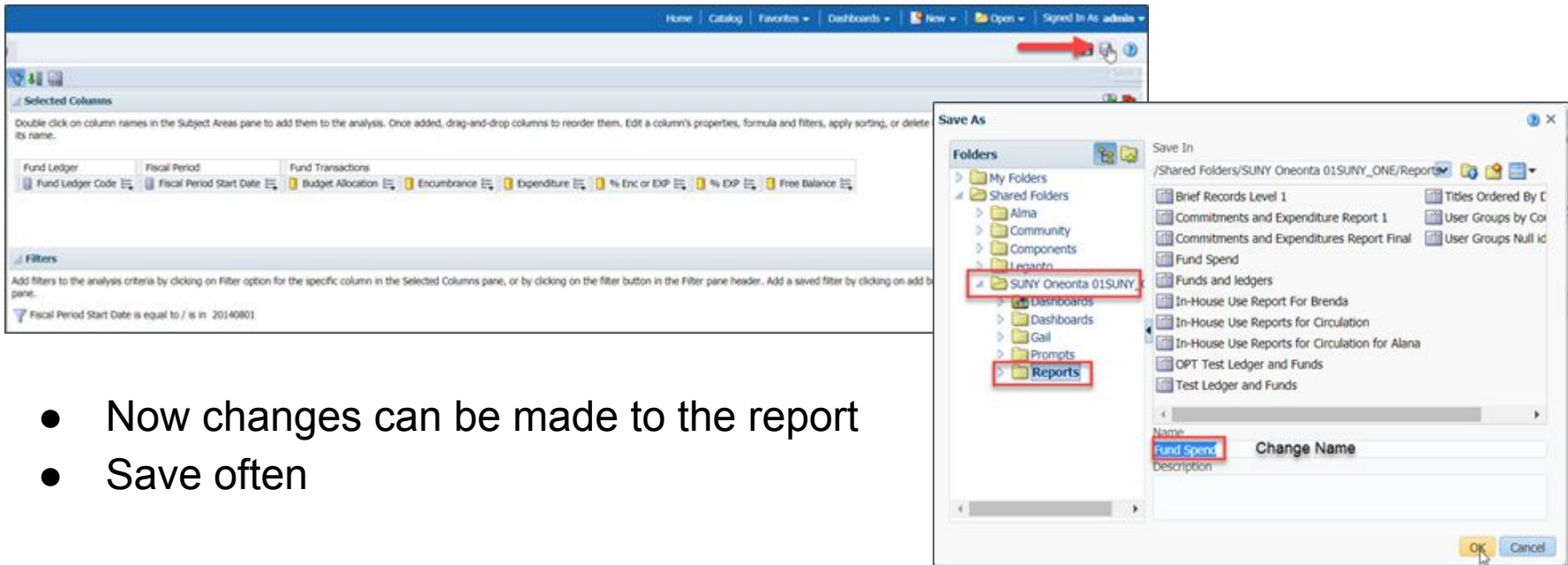
Using Analytics in Alma to Support Acquisitions

- Use existing reports created by other Institutions using Alma
 - Go to **Analytics>Analytics>Design Analytics**
 - Click **Catalog**
 - Click the **Community** folder
 - Click on the **Reports** folder
 - Click on the **Shared Reports** folder
 - Click on an Acquisitions Folder
 - Select desired report



Using Analytics in Alma to Support Acquisitions

- Copying a shared report in Analytics
 - Do not make changes to reports in the shared folders
 - Use **Save As** to make a copy of the report and save it in your institution's report folder



The image shows two overlapping screenshots from the Alma Analytics interface. The background screenshot displays the 'Selected Columns' pane with various financial metrics like 'Fund Ledger Code', 'Fiscal Period Start Date', 'Budget Allocation', 'Encumbrance', 'Expenditure', '% Enc or EXP', '% EXP', and 'Free Balance'. Below this is the 'Filters' pane, which includes a filter for 'Fiscal Period Start Date is equal to / is in 20140801'. A red arrow points to the user profile icon in the top right corner of the browser window.

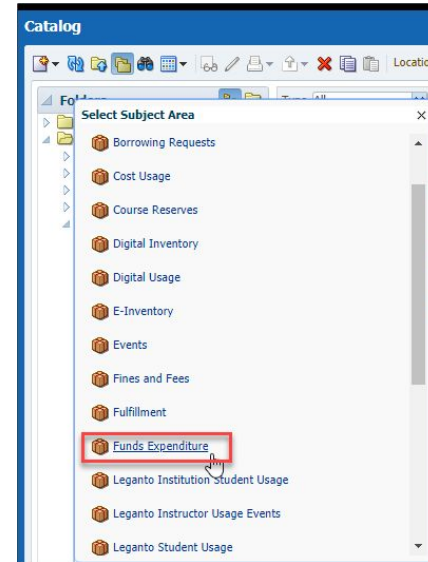
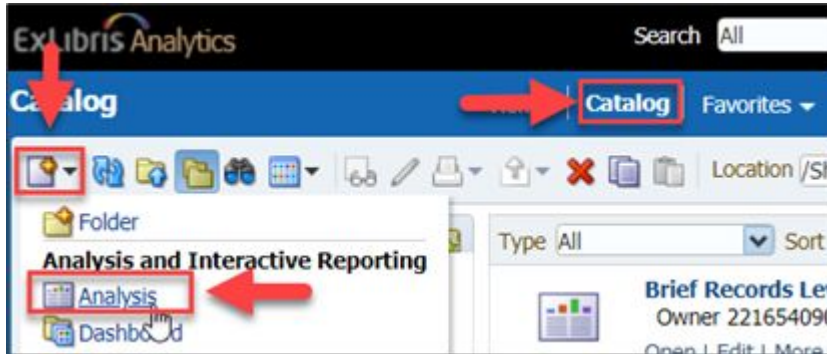
The foreground screenshot is a 'Save As' dialog box. The 'Folders' pane on the left shows a tree structure with 'SUNY Oneonta 01SUNY_01' selected, and its 'Reports' sub-folder is also highlighted with a red box. The 'Save In' pane on the right shows a list of reports, with 'Fund Spend' selected and highlighted with a red box. The 'Name' field at the bottom of the dialog contains the text 'Fund Spend' and 'Change Name'.

- Now changes can be made to the report
- Save often

Using Analytics in Alma to Support Acquisitions

Creating a new report in analytics

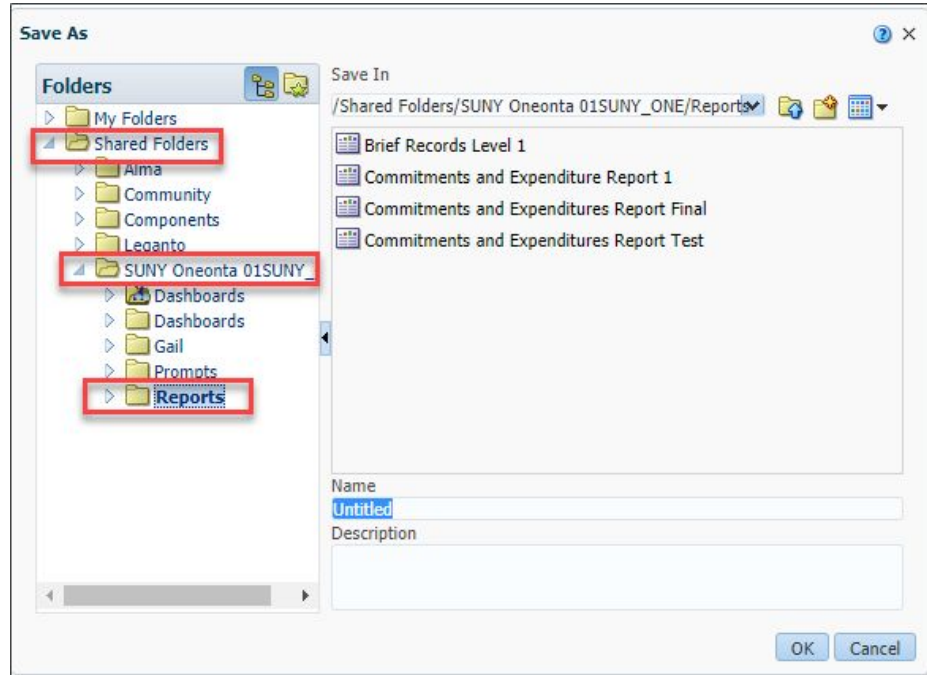
1. From the Alma menu choose ***Analytics>Design Analytic***
2. Click ***Catalog***
3. Click the ***New*** icon 📌 drop down menu
4. Click ***Analysis***
5. Click the ***Subject Area*** being used



Using Analytics to Support Acquisitions

Where to Save the Report

1. Click the **Save** icon
2. Click **Shared** Folder
3. Click your SUNY institution folder
4. Click **Report** folder
5. Name the Report
6. Click **OK**



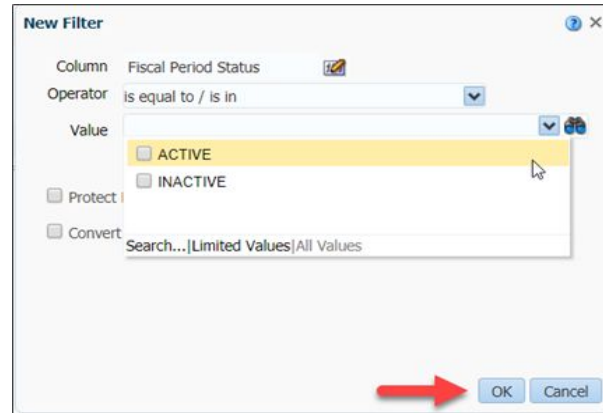
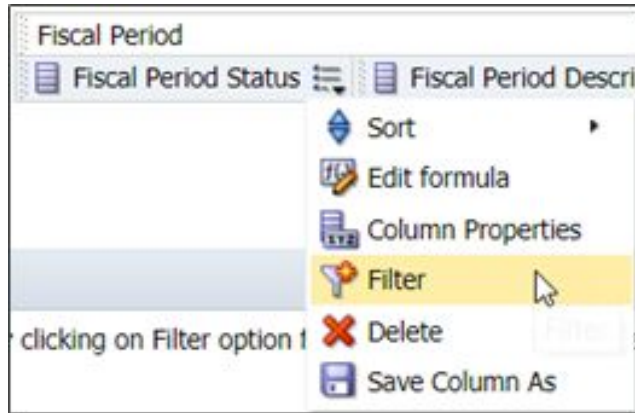
Using Analytics in Alma to Support Acquisitions

- How to populate Selected Columns
 - Click on the desired subject area folder
 - Double Click the desired column or drag and drop to add them to Selected Columns
- Rearrange the order of the columns
 - Click on the column and drag it to desired spot




Using Analytics in Alma to Support Acquisitions

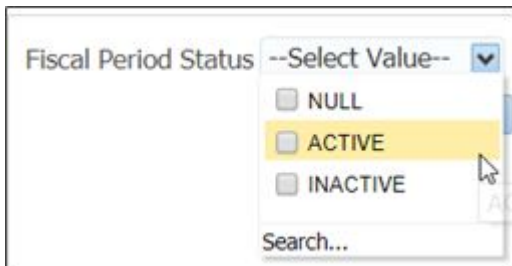
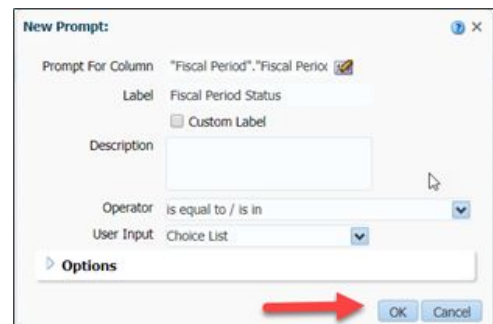
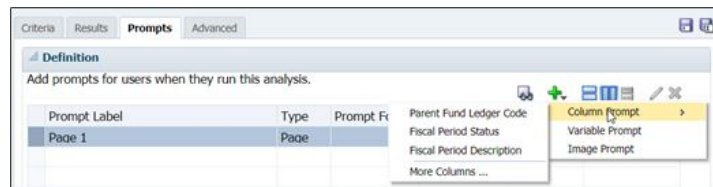
- Use filters to get the desired results in reports
 - Click on the menu on the Column
 - Click on **Filter**
 - Select Operator
 - Select Value
 - Click **Ok**



Using Analytics in Alma to Support Acquisitions

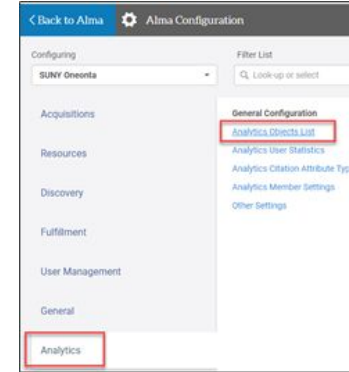
- Use Prompts

- Click the **Prompts** tab
- Click on the **green plus** sign 
- Click on **Column Prompt**
- Prompt Screen pops-up
 - Keep or change Label, Operator, Or User Input
- Review Prompt values
- Click **Save**



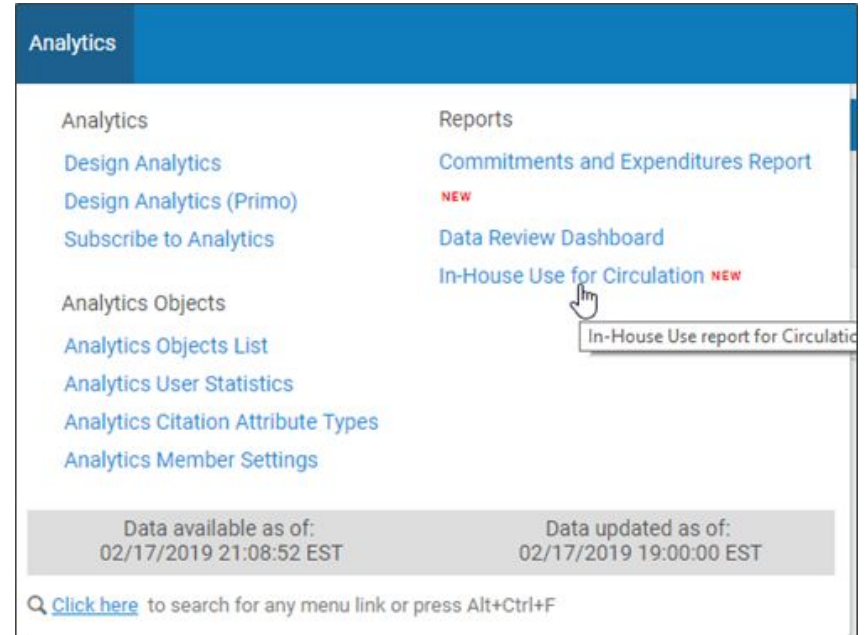
Adding an Analytics Report to Alma

1. Go to **Configuration>Analytics>Analytics Object List**
2. Click **Add New Analytics Object**
3. Choose **Add New Alma Analytics Object**
4. Name it: In-House Use Statistics (or something like this)
5. Change Analytic Folder to Your Library Path/Reports
6. Change Name: the report name in Analytics
7. Change type to Report
8. Add Roles to whom you would like to see the report
9. Click **Save**



Viewing an Analytics Report in Alma

1. Go to ***Analytics>Reports>Name of the In-House Use Report***
2. Report will appear
 - a. If report has a prompt, the prompt will appear
 - i. Enter prompt value
 - ii. Click ***Ok***



The screenshot shows the Alma Analytics interface. A blue header bar contains the word "Analytics". Below it, a menu is displayed with two columns of links. The right column includes "Reports", "Commitments and Expenditures Report", "Data Review Dashboard", and "In-House Use for Circulation NEW". A mouse cursor is hovering over the "In-House Use for Circulation NEW" link, which has triggered a tooltip that reads "In-House Use report for Circulation". At the bottom of the menu, there is a grey bar with the text "Data available as of: 02/17/2019 21:08:52 EST" and "Data updated as of: 02/17/2019 19:00:00 EST". Below this bar, there is a search prompt: "Click here to search for any menu link or press Alt+Ctrl+F".

Analytics	Reports
Design Analytics	Commitments and Expenditures Report
Design Analytics (Primo)	NEW
Subscribe to Analytics	Data Review Dashboard
Analytics Objects	In-House Use for Circulation NEW
Analytics Objects List	In-House Use report for Circulation
Analytics User Statistics	
Analytics Citation Attribute Types	
Analytics Member Settings	

Data available as of: 02/17/2019 21:08:52 EST Data updated as of: 02/17/2019 19:00:00 EST

Click here to search for any menu link or press Alt+Ctrl+F

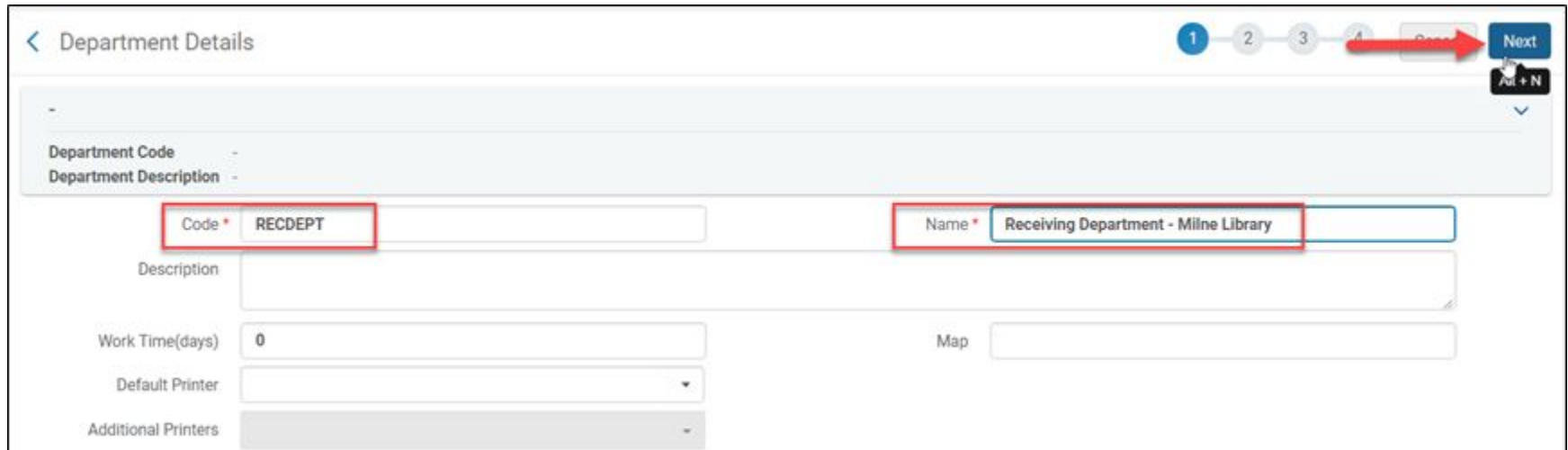
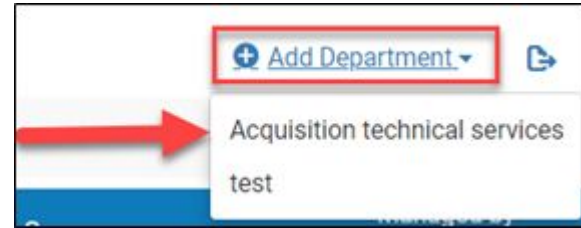
Configuring the Acquisitions/Receiving Department in Alma

- Go to **Configuration**
 - Change configuring from the Institution to the receiving library
 - **General>Work Orders and Departments>Work Order Departments**

The screenshot displays the Alma Configuration interface. At the top, there is a navigation bar with a blue button labeled '< Back to Alma' and a gear icon followed by the text 'Alma Configuration'. Below this, the main content area is divided into several sections. On the left, there is a vertical menu with the following items: 'Configuring' (highlighted with a red box), 'Milne Library' (a dropdown menu), 'Discovery', 'Fulfillment', and 'General' (highlighted with a red box). To the right of the 'Configuring' dropdown is a 'Filter List' section with a search input field containing the text 'Look-up or select'. The main content area is organized into a grid. The top row contains 'Libraries' and 'Work Orders and Departments' (highlighted with a red box). The second row contains 'Relationships' and 'Work Order Types'. The third row contains 'Locations' and 'Work Order Departments' (highlighted with a red box and a mouse cursor pointing to it). The bottom row contains 'Physical Locations'. The overall layout is clean and professional, with a light gray background and blue accents.

Configuring the Acquisitions/Receiving Department in Alma

- Click **Add Department**
 - Choose **Acquisitions technical services**
 - Code: [cannot be changed once saved]
 - Name: [name the Department]
 - Printer: [can assign the department printer]
 - Click **Next**

A screenshot of the 'Department Details' form in Alma. The form is titled 'Department Details' and has a progress indicator at the top right with steps 1, 2, 3, 4, and 5. Step 4 is highlighted with a red arrow. The form contains several fields: 'Department Code' (value: -), 'Department Description' (value: -), 'Code' (value: RECDEPT), 'Name' (value: Receiving Department - Milne Library), 'Description' (empty), 'Work Time(days)' (value: 0), 'Map' (empty), 'Default Printer' (dropdown menu), and 'Additional Printers' (dropdown menu). The 'Code' and 'Name' fields are highlighted with red boxes.

Configuring the Acquisitions/Receiving Department in Alma

- Attach library: [if receiving for more than one library add them here]
- Click **Next**

Served Libraries

1 2 3 4 Cancel [Red Arrow] Next

Receiving Department - Milne Library

Department Code RECDEPT
Department Description -

1 - 1 of 1 [Search]

Attach Library [Red Box]

Name	Description
1 Milne Library	Automatically connected to the Configuring library [Red Box]

- Contact information: [optional]
- Click Next

Configuring the Acquisitions/Receiving Department in Alma

- Add Operator: [will assign Receiving Operator role to new users and users with assigned Receiving Operator from manage users will appear here]
- Click **Save**

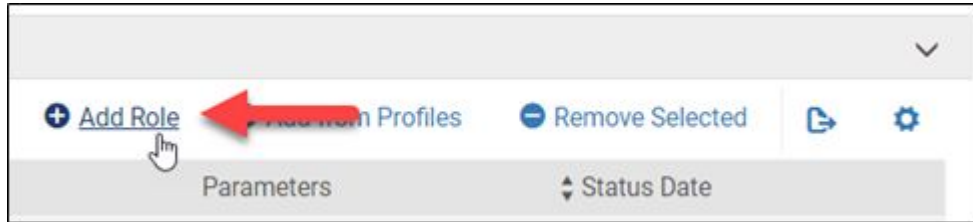


The screenshot displays the Alma user management interface. At the top right, there is a button labeled "Add Operator" with a plus icon and a dropdown arrow, which is highlighted with a red box. Below this is a table with a blue header bar containing a "Name" column and a sort icon. The table lists eight users, each with a row number, a name, and a three-dot menu icon on the right. A red box highlights a warning message in the second row: "Users already populated here have the role of Receiving Operator and their role is scoped to this receiving desk in their User Profile."

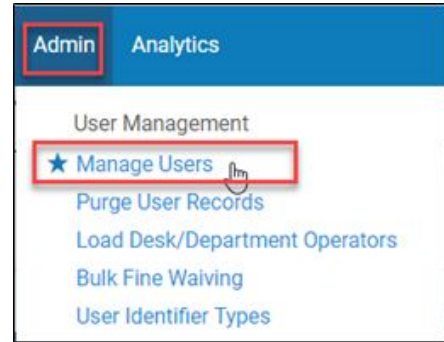
Name		
1	Dourlaris, Christie A.	...
2	Loudon, Craig D.	...
3	Administrator, Alma	...
4	Support, Ex Libris	...
5	Implementer, Ex Libris	...
6	Brown, Rinda L.	...
7	Baldwin, Lois M.	...
8	Southard, Tammy A.	...

Scoping the Receiving Operator Role

- Go to *Admin>Manage Users*
- Search for User being given the Receiving Operator role
- Click on the user's name or **edit** in the ellipses
 - Click *Add Role*



- Check the box next to Receiving Operator under Acquisitions
 - Click *Add Role*



Scoping the Receiving Operator Role

- Under Role Information
 - Scope: [Work Order Department for the institution]
 - Status: Active
 - Click **Add Service Unit**
 - Select the service unit
 - Click Add Service Unit
 - Click **Save Role**
 - Click **Save**

User Roles Details Save Role

Test, Maggie

ID: testma, Record type: Staff, Account Type: Internal, User group: Faculty/Staff, Manage fulfillment activities

Role information

Role name: **Receiving Operator**, Scope: **Milne Library**, Status: **Active**, Expiry Date: [calendar icon]

Role parameters

No records were found.

Service Unit: **ONEMN Acquisitions Departm** × ☰

Add service unit

Configuring Acquisitions to Close an Invoice Upon Creation

- Go to **Configuration>Acquisitions>General>Other Settings**
- Make sure the following two parameters are set to:
 - **Invoice_skip_erp=true**
 - Indicates the invoice will not be sent to the ERP
 - **Handle_invoice_payment=false**
 - Indicates the invoice is closed (status closed) without waiting for payment

exportPrepaidInv	acquisition	false	Invoice to be exported to ERF	-	-	...
handle_invoice_payment	acquisition	false		admin	02/20/2019	...
invoice_allow_vat_in_line_level	acquisition	false		exl_impl	10/29/2018	...
invoice_high_total_price	acquisition	2500		exl_impl	10/29/2018	...
invoice_high_total_use_currency	acquisition	false	If true then invoice price will	-	-	...
invoice_not_unique	acquisition	false		exl_impl	10/29/2018	...
invoice_prefix	acquisition	INV-		-	-	...
invoice_skip_erp	acquisition	true	Dont send invoices to ERP.	exl_impl	02/20/2019	...
Invoice_split_additional_charges	acquisition	false		-	-	...

tying up some loose ends

going back to ledgers and funds...

- campuses migrating Aleph ledgers and funds do not have the option to maintain customizations made in Alma during cut-over.
- customizations made in Alma can be requested to stay in place during cut-over only in cases where no ledger and fund data is migrating from Aleph.

a quick comment about vendor records (access provider):

you may want to consider populating some of the tabs in the interface for vendors with assigned type “access provider:”

The screenshot shows a web interface for managing vendor records. The title is "Vendor Interface Details". At the top right are "Cancel" and "Save" buttons. The main header displays "AMERICAN CHEMICAL SOCIETY" with an information icon. Below this is a table with the following data:

Vendor code	Interface Name	Interface Description
ACS	American Chemical Society	PRVABC

Below the table are several tabs: Summary, Contact Information, Administrative Information, Access Information, Statistics Information, Inventory, and Notes. The "General Attributes" section is expanded, showing a text input field for "Interface Name" with the value "American Chemical Society" and a clear button (X).

AMERICAN CHEMICAL SOCIETY



Vendor code ACS Interface Name American Chemical Society Interface Description PRVABC

Summary

Contact Information

Administrative Information

Access Information

Statistics Information

Inventory

Notes

Interface General Details

SECURITY ATTRIBUTES

User ID

milne

User Password

milne99

User Password Note

Default pw: milne

URL ATTRIBUTES

Online Admin Module

Open URL Compliant

Admin URI

http://pubs.acs.org/4librarians/usage

Admin URI Type

Uri

Linking Note

Default URI: http://pubs.acs.org/4librarians/usage

SUPPORT

Incident Log

Admin

AMERICAN CHEMICAL SOCIETY



Vendor code ACS **Interface Name** American Chemical Society **Interface Description** PRVABC

- Summary
- Contact Information
- Administrative Information
- Access Information
- Statistics Information**
- Inventory
- Notes

Interface General Details

SECURITY ATTRIBUTES

User ID

User Password

User Password Note

USAGE STATISTICS

Usage Stats Available

Usage Stats Delivery Method

Stats Format

Usage Stats Frequency

Usage Stats Online Location

Usage Stats Delivery Address

Usage Stats Locally Stored

Linking Note

finally, an open question regarding POLs:



a list of POLs can be generated by searching “All” Order Lines with the wildcard “?”

See Basecamp post: https://3.basecamp.com/3765443/buckets/8186639/messages/1617745739#__recording_1617825136

Order lines ▾ Title ▾ ? ✕ 🔍 Advanced ▾

Facets « Purchase Order Lines (1 - 7 of 7) ? Back Save Query

Expand ▾ 🔗 ⚙️

1		A First Cookbook for Children [electronic resource]., Newburyport :, Dover Publications, 2013., 0-486-24275-7, ISBN MMS ID: 995340249004833 Assigned to: - Type: Physical - One Time PO line owner: Milne Library Standard number: 0-486-24275-7 Order: PO-216 / (Sent) Order Line: POL-129 / (Waiting for Invoice) ∨ Physical One Time (1)	Copies: Milne Library - Upper Level-MCIRC (1) Total price: 40.00 USD Funds: Communication (100.0%) (FY-2019) Vendor/Account: YANKEE BOOK PEDDLER INC / Print Firm Orders GOBI - Print Firm Vendor reference ID: - Expected delivery: 01/29/2019	Receiving note: - Sent date: 01/29/2019 Items already exist in the repository, At least one of the reporting codes is missing	Edit Change Bib Reference ⋮
2		Blueberry soup / Wilma's Wish Productions., [Seattle, WA?] :, Wilma's Wish Productions,, 2013, MMS ID: 995340249704833 Assigned to: -	Copies: Milne Library - Upper Level-MCIRC (1) Total price: 22.00 USD	Receiving note: - Sent date: 01/29/2019	Edit Change Bib Reference ⋮

the same strategy works for invoices:

Invoices ▾ All ▾ ? X Q

Facets << Find Invoices (1 - 4 of 4) | ?

Status ▾
In Review (2)
Waiting for Payment (1)
Closed (1)

Alert ▾
Invoice with the sam... (2)
Additional Invoice lin... (2)

Vendor ▾
YANKEE BOOK PEDD... (4)

Source ▾
From PO (4)

Owner ▾
Milne Library (4)

📄 ⚙️

Invoice #	Status	Vendor	Owner	Creator from	Creation Date	Last Updated Date	# of Lines	Total Price	
1 PO-4	2 In Review	YANKEE BOOK PEDDLER INC	Milne Library	From PO	01/21/2019	01/23/2019	5	22.00 USD	...
2 PO-4	2 In Review	YANKEE BOOK PEDDLER INC	Milne Library	From PO	01/21/2019	01/21/2019	5	22.00 USD	...
3 PO-4	0 Waiting for Payment	YANKEE BOOK PEDDLER INC	Milne Library	From PO	01/21/2019	01/21/2019	5	22.00 USD	...
4 PO-1	0 Closed	YANKEE BOOK PEDDLER INC	Milne Library	From PO	01/21/2019	01/21/2019	5	20.00 USD	...

Searching POLs by Vendor

- Select Order Line from the persistent search bar
- Click the **Advanced** search link
- Select Vendor Code or Vendor Name
 - Type in Vendor Code or Vendor name depending on your search criteria
 - Click **Save**

