The State University of New York

Advanced Acquisitions: Configuration

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Introduction

- Roles
- Rules & Reviewing
- Mapping Tables
- Usage Statistics

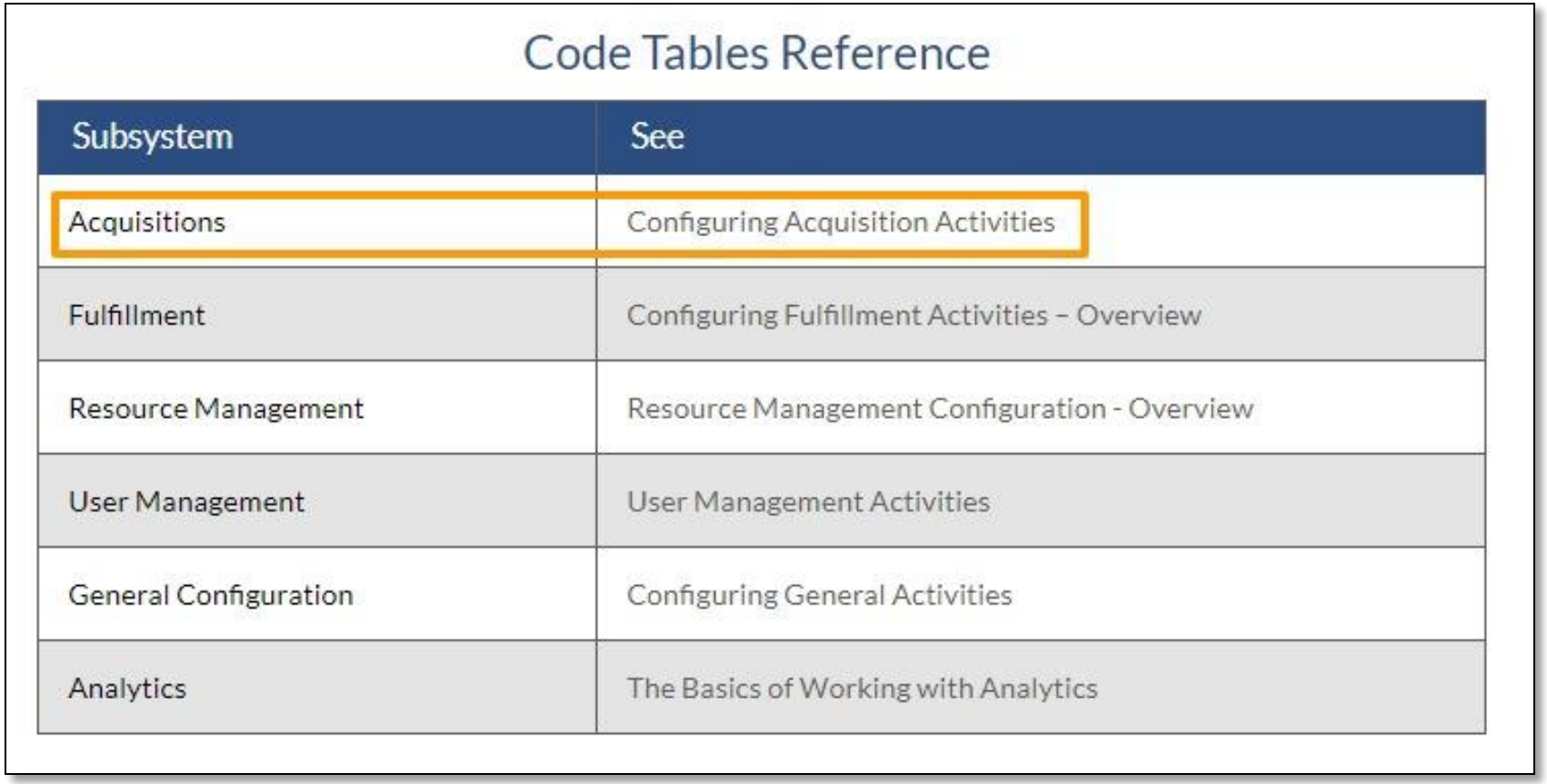
Rows of uniform autumn leaves by Zamurovic Brothers from Noun Project

*generally

Roles:
Acquisitions Administrator*

https://thenounproject.com/amoghdesign/collection/autumn-glyphs/?i=1260128

Alma Code Table Reference



Code Tables Reference

Subsystem	See
Acquisitions	Configuring Acquisition Activities
Fulfillment	Configuring Fulfillment Activities – Overview
Resource Management	Resource Management Configuration - Overview
User Management	User Management Activities
General Configuration	Configuring General Activities
Analytics	The Basics of Working with Analytics

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/050Configuring_General_Alma_Functions/210Alma_Code_Table_Reference

Purchase Order Rules

https://thenounproject.com/amoghdesign/collection/autumn-glyphs/?i=1260133

Configured at Institution level

- [Primary] Reporting Codes
- Secondary Reporting Codes
- Tertiary Reporting Codes
- Purchasing Review Rules – for auto packaging
- Shipping Method
- POL Cancellation Reasons
- POL Types [quantity – 42]
- Acquisition Methods [quantity – 16]
- EDI Vendor Note Fields

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Code Table

Tertiary Reporting Code

Enabled	Move Up	Move Down	Code	Description
			10	BUSE Accounting Economics Finance
				AFR African Studies
				ANT Anthropology
				ART Art
				BIO Biological Sciences
				BUS Business Administration
				CHM Chemistry
				CMC Communication

Reporting Code

	Enabled	Move Up	Move Down	Code	Description	Default Value
1	✓			7031	Print Books	●
2	✓	▲	▼	110	Ebooks	○
3	✓	▲	▼	7035	Physical media DVD CD microfilm etc	○
4	✓	▲	▼	7051	Print Serials	○
5	✓	▲	▼	130	Ejournals including packages	○
6	✓	▲	▼	140	Electronic aggregators and databases	○
7	✓	▲	▼	120	Streaming and other electronic resources	○

- **Material types**
- **Academic departments**
- **Requestors**

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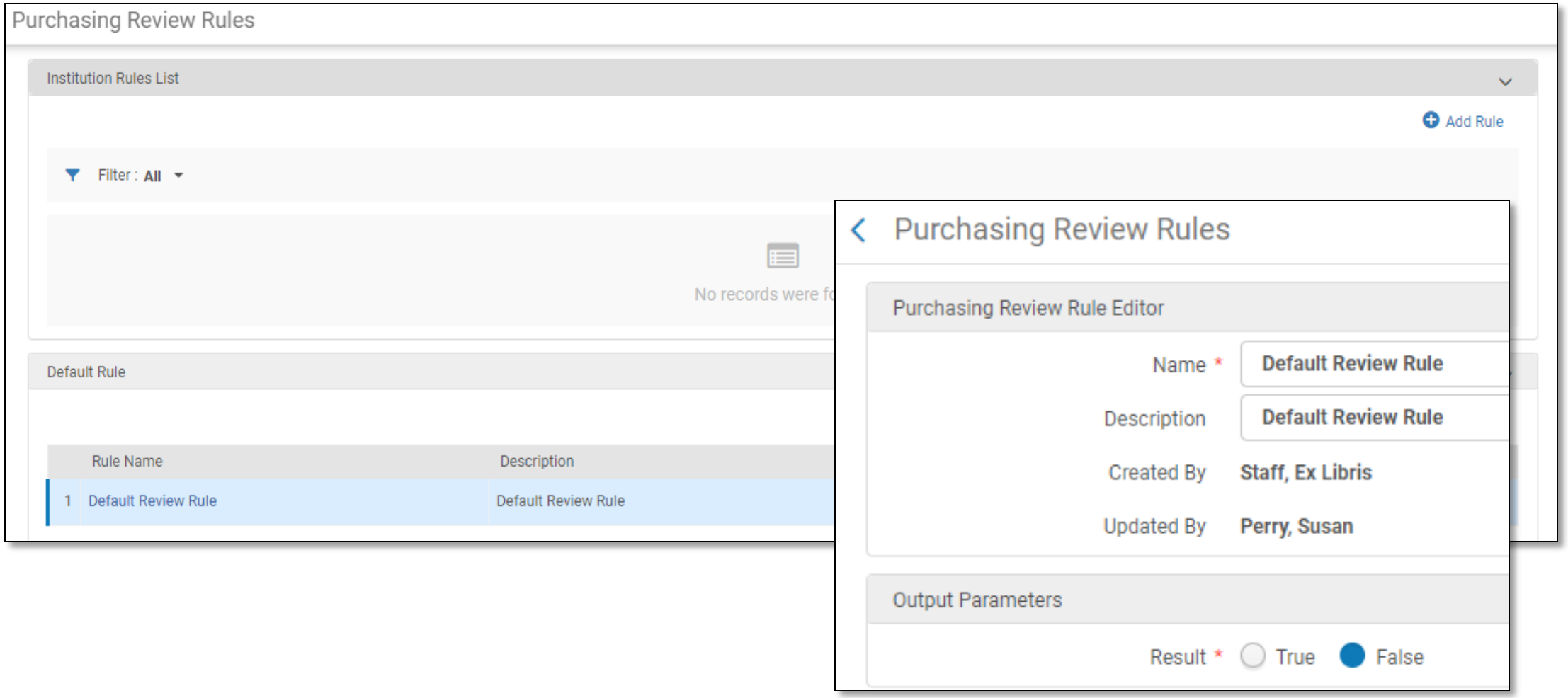
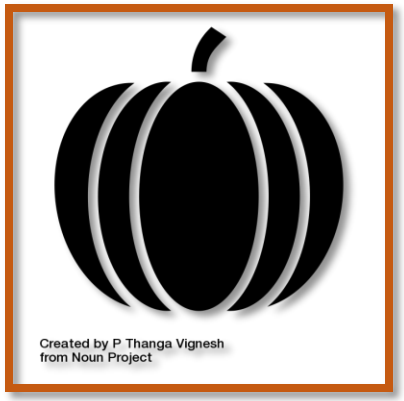


Invoicing Rules



https://thenounproject.com/amoghdesign/collection/autumn-glyphs/?i=1260141

Configured at Institution level

- Invoice Review Rules – by vendor, for example
- Invoice Approval Rules – based on alerts, for example
- Disapproval Reasons
- Payment Method [Demo – prepaid]
- Invoice Line Types

Note:
Acquisitions alert changes planned for November 2020 release

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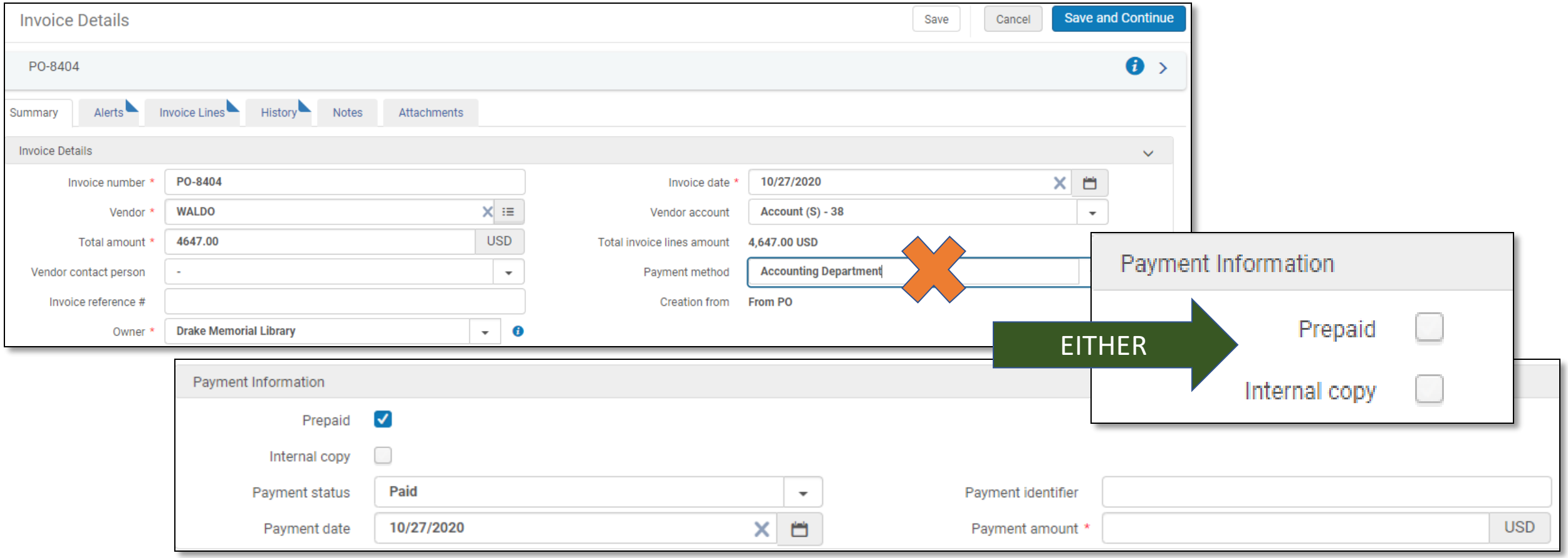
Invoice & Pay in One Step



Licenses

https://thenounproject.com/amoghdesign/collection/autumn-glyphs/?i=1260126

Roles:
License Manager

Configured at Institution level

- Sections Order
- Manage License Term
- License Storage Location
- Access Model
- License Review Status
- Discovery Interface Labels Customized

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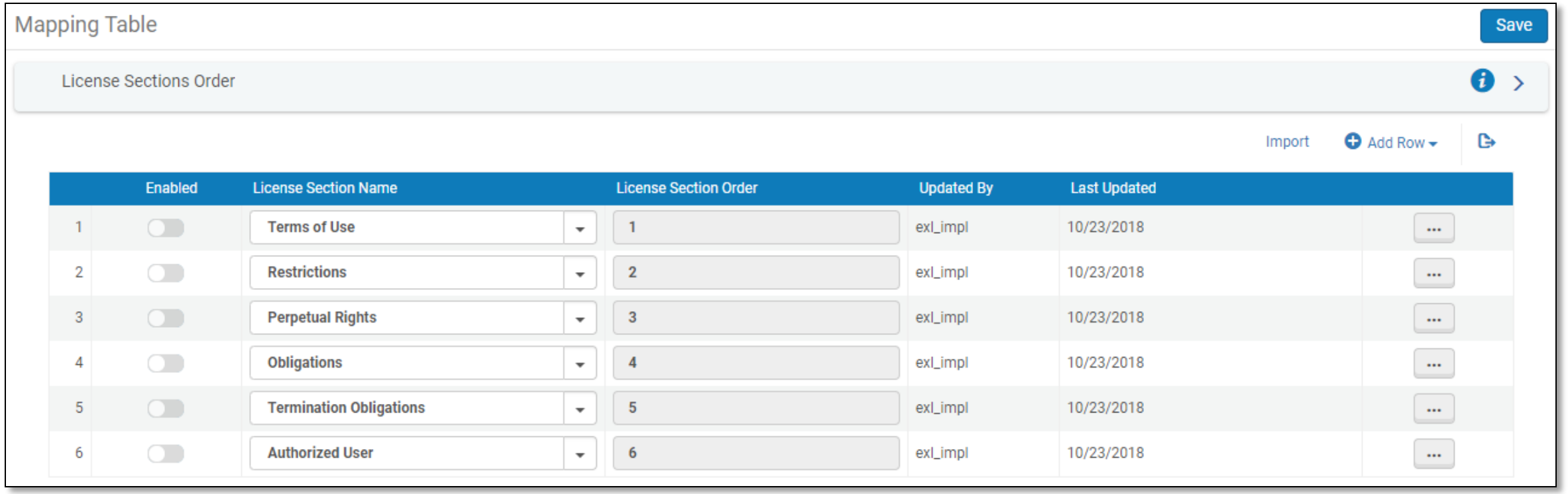
Working with Licenses in Alma

https://slcny.libguides.com/training-eresources/licenses



	Enabled	License Section Name	License Section Order	Updated By	Last Updated	
1		Terms of Use	1	exl_impl	10/23/2018	...
2		Restrictions	2	exl_impl	10/23/2018	...
3		Perpetual Rights	3	exl_impl	10/23/2018	...
4		Obligations	4	exl_impl	10/23/2018	...
5		Termination Obligations	5	exl_impl	10/23/2018	...
6		Authorized User	6	exl_impl	10/23/2018	...

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Q. Will license info display to the public in Primo?

https://slcny.libanswers.com/faq/232595

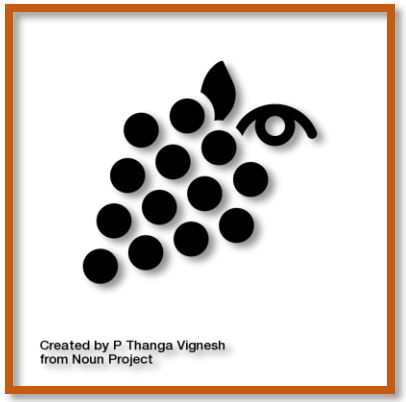
Purchase Request Rules

https://thenounproject.com/amoghdesign/collection/autumn-glyphs/?i=1260145

Configured at Institution level

- Reject Reasons
- Material Types

General



https://thenounproject.com/amoghdesign/collection/autumn-glyphs/?i=1260139

Configured at Institution level

- Other Settings [total of 40 parameters]
- Fund and Ledger Fiscal Period
- Fund Types
- Acquisitions Jobs Configurations [2 jobs]
- Subscribers [usage stats]
- Manage Acquisitions Alerts (Invoice alerts, POL alerts) - due November 2020 release

Examples / Other Settings

- auto_claim
- invoice_subscription_overlap
- no_e-task_on_close_po_line
- release_remaining_encumbrance_for_edi
- view_holding_in_receiving

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Manage Acquisitions Alerts

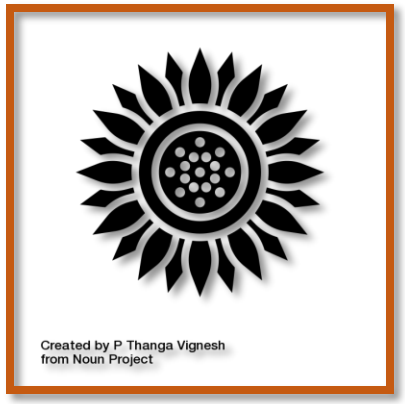
Invoice Alerts

	Enabled	Description
1	✓	Invoice contains vendor account which differs from one or more linked PO lines.
2	✓	Some invoice lines differ in price from their linked PO line.
3	✓	The invoice owner is the institution. All associated PO lines are owned by a single library. You can change the invoice owner to match the PO line owner.

PO Line Alerts

	Enabled	Description
1	✓	Access model field does not match the access model on the portfolio. Saving the POL will overwrite the access model on the portfolio.
2	✓	At least one of the reporting codes is missing.
3	✓	Funds From Different Ledgers
4	✓	Open claims exist for this po line.
5	✓	Overdue po line.
6	✓	Price Limit Reached
7	✓	The bib record is brief.
8	✓	The bib record is part of a series/book set.
9	✓	The ordered resource was canceled in a previous order #{0}
10	✓	The ordered resource already exists in the Inventory ({0} electronic collections)
11	✓	The ordered resource already exists in the Inventory ({0} items)
12	✓	There is an active order #{0} for this ordered resource

Usage Statistics



https://thenounproject.com/amoghdesign/collection/autumn-glyphs/?i=1260150

Configured at Vendor level

Roles:

- Acquisitions Administrator
- Vendor Manager
- Vendor Account Manager
- Usage Data Operator
- General System Administrator

COUNTER-compliant usage stats
Automatic (SUSHI) or manually

SUSHI protocol --> Standardized Usage Statistics Harvesting Initiative

- If vendor supports it
- Vendor lists available

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/090Acquisitions_Infrastructure/010Managing_Vendors/SUSHI_Vendor_Lists

COUNTER compliant -->
Counting Online Usage of Networked Electronic Resources

Release 4 or 5

https://www.projectcounter.org

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Search Vendors

	Shared	Active	▲ Vendor Code	Name	Vendor Type
1		⬤	acm	ACM Digital Library	Access Provider, SUSHI Vendor
2		⬤	acs	American Chemical Society	Access Provider, SUSHI Vendor
3		⬤	aipsci	AIP/Scitation	Access Provider, SUSHI Vendor
4		⬤	alex	Alexander Street Press	Access Provider, SUSHI Vendor
5		⬤	AMAZON	AMAZON	Material Supplier
6		⬤	aps	American Physical Society	Access Provider, SUSHI Vendor
7		⬤	BOOKSTORE	BOOKSTORE	Material Supplier
8		⬤	EBSCO	EBSCO Industries	Material Supplier, Access Provider, Licensor, SUSHI Vendor

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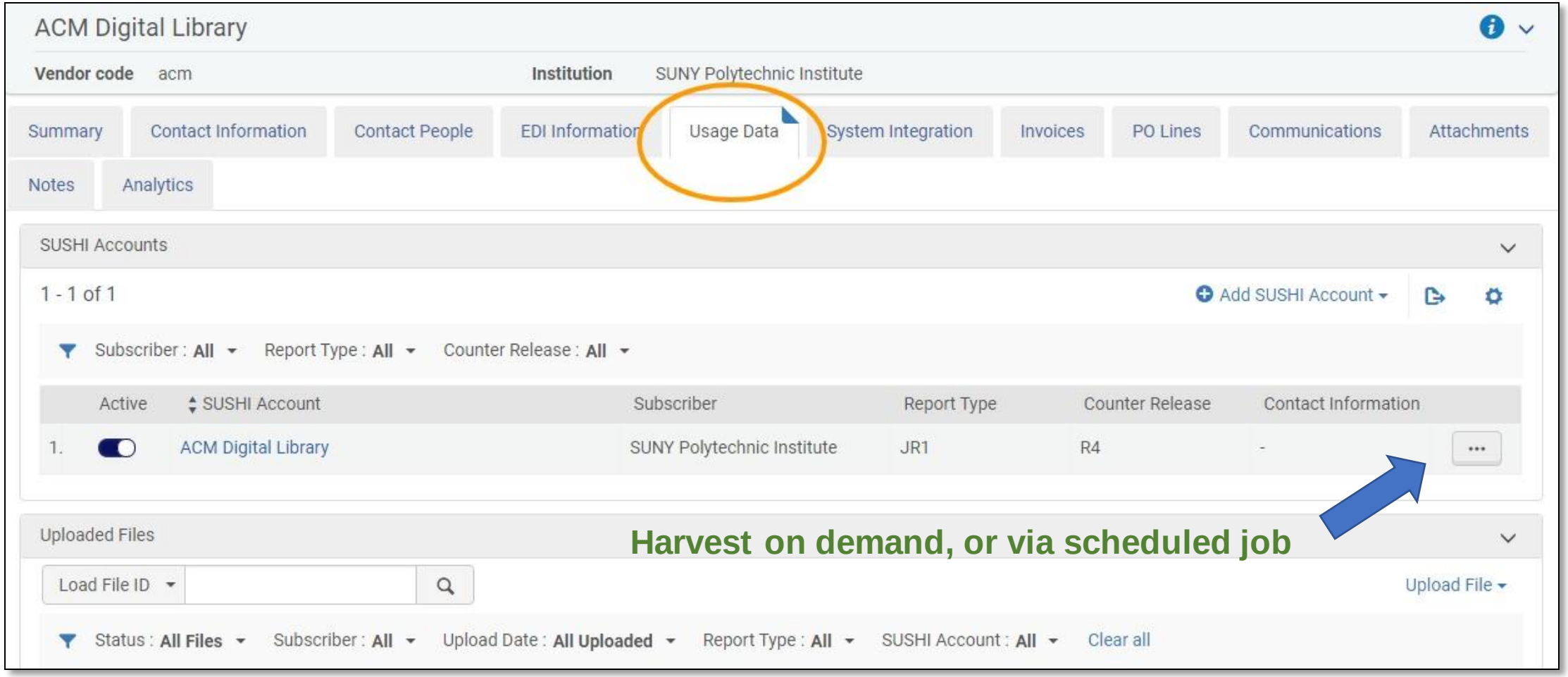

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Uploaded Files

1 - 4 of 4 | Load File ID | Upload File

Status : **All Files** | Subscriber : **All** | Upload Date : **All Uploaded** | Report Type : **All** | SUSHI Account : **All** | Clear all

	File Name	SUSHI Account	Upload Date	Uploading User	Subscriber	Status	Status Descripti	Report Type	Data Start Date	Data End Date	Vendor URL	Report Success Rate (Global)	
1	Sushi_Americ... Physical Society_tr_j3_...	American Physical Society	03 Oct 2020 08:04:37	Sushi Scheduler	SUNY Polytechnic Institute	Fully processed	-	tr_j3:R5	Sep 2020	Sep 2020	https://inq...	Yearly: 0.0% Half-Year: 0.0% Quarterly: 0.0%	...
2	Sushi_Americ... Physical Society_tr_j3_...	American Physical Society	05 Sep 2020 08:07:45	Sushi Scheduler	SUNY Polytechnic Institute	Fully processed	-	tr_j3:R5	Aug 2020	Aug 2020	https://inq...	Yearly: 0.0% Half-Year: 0.0% Quarterly: 0.0%	...
3	Sushi_Americ... Physical Society_tr_j3_...	American Physical Society	01 Aug 2020 08:05:37	Sushi Scheduler	SUNY Polytechnic Institute	Fully processed	-	tr_j3:R5	Jan 2020	Jul 2020	https://inq...	Yearly: 0.0% Half-Year: 0.0% Quarterly: 0.0%	...
4	Sushi_Americ... Physical Society_tr_j3_...	American Physical Society	01 Aug 2020 08:04:35	Sushi Scheduler	SUNY Polytechnic Institute	Fully processed	-	tr_j3:R5	Aug 2019	Dec 2019	https://inq...	Yearly: 0.0% Half-Year: 0.0% Quarterly: 0.0%	...

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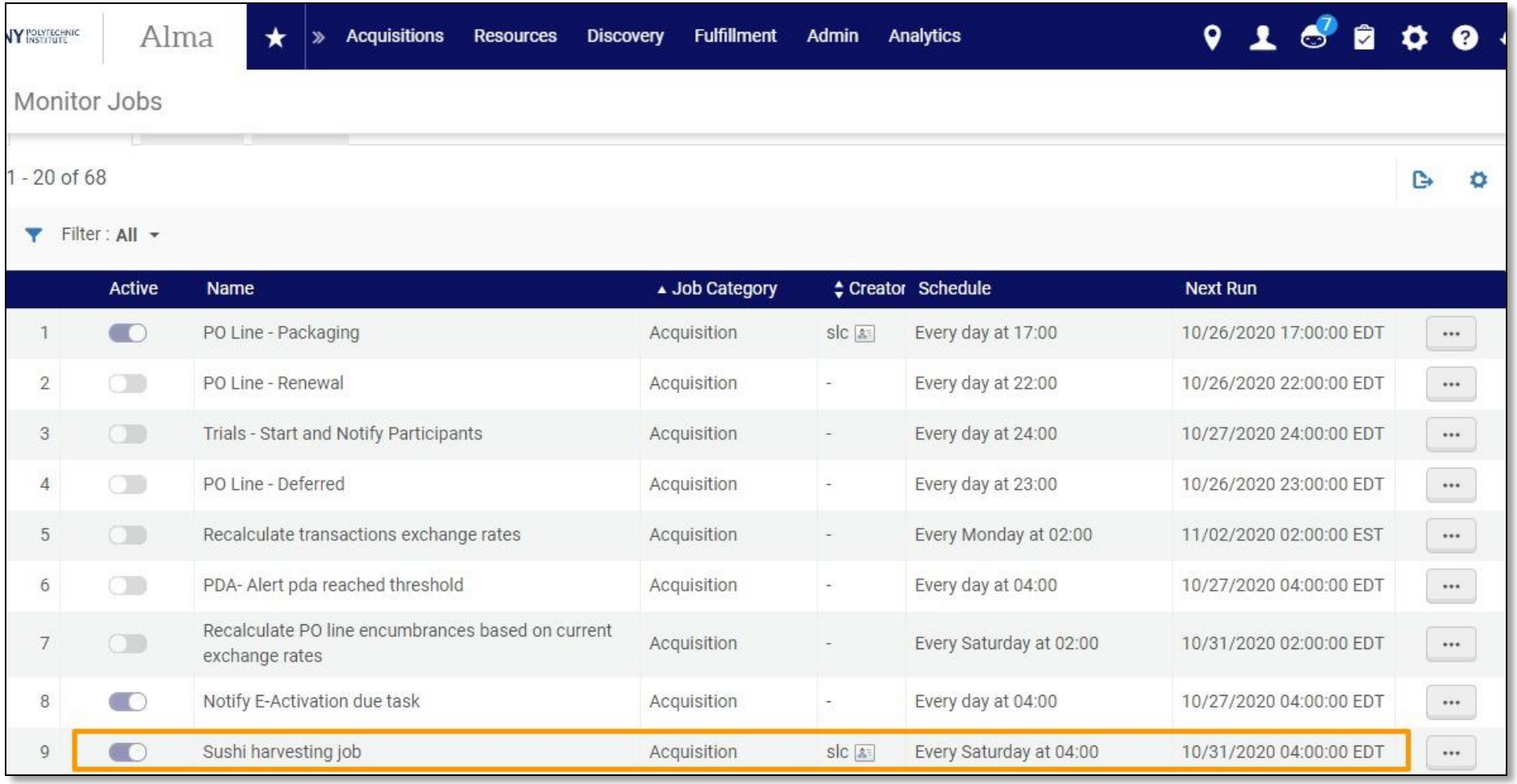

	Active	Name	Job Category	Creator	Schedule	Next Run
1	on	PO Line - Packaging	Acquisition	slc	Every day at 17:00	10/26/2020 17:00:00 EDT
2	off	PO Line - Renewal	Acquisition	-	Every day at 22:00	10/26/2020 22:00:00 EDT
3	off	Trials - Start and Notify Participants	Acquisition	-	Every day at 24:00	10/27/2020 24:00:00 EDT
4	off	PO Line - Deferred	Acquisition	-	Every day at 23:00	10/26/2020 23:00:00 EDT
5	off	Recalculate transactions exchange rates	Acquisition	-	Every Monday at 02:00	11/02/2020 02:00:00 EST
6	off	PDA- Alert pda reached threshold	Acquisition	-	Every day at 04:00	10/27/2020 04:00:00 EDT
7	off	Recalculate PO line encumbrances based on current exchange rates	Acquisition	-	Every Saturday at 02:00	10/31/2020 02:00:00 EDT
8	on	Notify E-Activation due task	Acquisition	-	Every day at 04:00	10/27/2020 04:00:00 EDT
9	on	Sushi harvesting job	Acquisition	slc	Every Saturday at 04:00	10/31/2020 04:00:00 EDT

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3/25/20

Advanced ERM: Usage Data, SUSHI, and Licenses

https://public.3.basecamp.com/p/YxqBBNcEGAuS1NEui59zc1AS

Resources

Acquisitions Configuration Overview
https://slcny.libguides.com/training-syslibs/acquisitions

Configuring Acquisitions Activities (ExLibris)
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/110Configuring_Acquisitions/010Configuring_Acquisition_Activities

Autumn leaves from green to red on light background by Zamurovic Brothers from Noun Project

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Questions?

Comments?

info@slcny.libanswers.com

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