CARLI Post-Session Discussion Notes from Ex Libris Knowledge Days: Optimize and Streamline Alma Workflows – June 17, 2021

CARLI has the following two documentation pages with recommendations for I-Share institutions that were developed by the I-Share Acquisitions Advisory Group in summer 2020:

Recommended PO Line types
https://www.carli.illinois.edu/products-services/i-share/acquisitions/polinetypes

PO Line Templates in Alma Acquisitions
https://www.carli.illinois.edu/products-services/i-share/acquisitions/poltemplates

Q: I have been using a Book type instead of a Physical type as the PO Line Type, but the Ex Libris presenter recommended using Physical so that it can apply to different physical formats. Is this okay?
A: Yes, that is okay. It's a local decision on which PO Line Type to use. The historical type is maintained as is, so you may need to remember that for any future reporting. After you select the types that you are consolidating, you'll want to use the same type of PO line going forward.

Comment: One tip I think would have been helpful to have had for reducing the list of claims after migration is to make sure your vendors are set up to have a 'number of days' before they appear on the claims list. When we got started, the person who input our list of many, many vendors did not include that. Therefore, any order immediately went on the claims list.
CARLI Response: That's a good tip to double-check that setting right away any time you are adding a new vendor to Alma. With the migration, unfortunately, that data probably wasn't available to migrate from Voyager.

Q: Is there a way to save activation data in a POL Template? We have boilerplate access info that I have to copy and paste in every time I order an e-book, I activate it while creating the PO.
A: It doesn't seem so. You need to activate electronic at the service level, so you can't create this information while activating the PO. Activating as the service can activate all portfolios.

Q: She talked about the "claiming task list" but I don't find anything in Alma called that. Is the list at "Acquisitions --> Purchase Order Lines --> Claim" what she was talking about?
A: Yes, that's one way to get there. The other way to click on the clipboard icon in the upper right, which opens the same task list. If you have the tasks widget on your Alma dashboard, and are able to see Order Lines as a task, then opening that will show "order lines with claims" as well (Tasks Widget > Order Lines > Order Lines with Claims).

Comment: I was a little surprised that she recommended narrowing down the list of material types and consolidating them...from the fulfillment perspective, it could have an impact on requesting materials if someone wants to request the same item in different material types. We ran into a situation in which people wanted to request the same item in different formats. The

user wanted to request the DVD but requested Blu-ray instead. Unless Alma can distinguish between the two types of items, Alma won't allow two requests on the same item. It might have something to do with the way we catalog things here.
CARLI Response: The Material Types were populated during migration and there were some areas that it didn't get specific enough. The CARLI staff present today weren't aware that Fulfillment might look at material type, that's something we'll need to investigate further. Perhaps the Ex Libris example to eliminate Blu-Ray in favor of DVD wasn't a good example, but the take-away is if you don't use certain types at your institution, you can make your life easier by decreasing the number of types that you need to scroll through.

Q: Does anyone know how to get the Tasks widget to show all tasks for everyone without changing locations? We only have 3 people, and it would be helpful if we could all see the tasks as they appear for everyone (i.e., invoices, requests, repairs, etc.).
A: Tasks are tied to roles, so if you have different roles, you may not be able to see all the tasks.

Q: I only use Acquisitions for serials check-in, and I do not use the claim function in Alma. All of my serials are entered as gifts. I have been creating vendors for each title. It was mentioned that a vendor is not needed for a gift? I can quit creating vendors?
A: No, we think that the Ex Libris trainer misspoke; vendors are needed for gifts, but you don't need to add a fund and price. You could have one gift vendor and one account. A few participants also chimed in in chat that they have done this.

Q: When we create items for reserve through resources we only have 2 templates to choose from. Books or articles. Do you have to go through acquisitions to get more template options?
A: In Resources > Add Physical Items, there are only two templates available. There is an Idea Exchange item asking for more quick-cataloging templates to be available:
https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/38870368-multiple-quick-cataloging-templates
In general, you can create new templates from Metadata Editor. Go to Shared templates > Create new record from template, but those are only available in the Metadata Editor.

Q: Speaking of gifts, I find it odd that there is no field in Alma to record the donor's name (as Voyager had). We have been putting the donor's name in the note field. Is there a better solution?
A: In the POL, yes, that's correct. Voyager had a field for a single requester, and it also had a donor box. In Alma, you have many choices to feature gifts from a particular donor:

- use one of the note fields in the POL, such as the receiving note or free text note
- create a gift vendor for a particular donor and add contact information
- create a Collection in Alma
- add donor information to a holding record 852$z public note
- add information to a holdings record note field like 541 or 561

The POL notes as well as holdings records 852$z and the specialty holdings records notes fields like 541 and 561 are all reportable in Analytics.

You could also create a POL template for a particular donor or for gifts and pre-select the acquisitions method as gift and/or add free text note or receiving note of your choice.

Q: We would like to be able to create reports using the donor information. Is the notes field in the POL "reportable"?
A: Yes. Look under Funds/Expenditure subject area. Note to vendor and receiving note are there.

Q: Do we need to add gifts through Acq. for best tracking? We have just been cataloging them and adding the donor in the 852 $x (non public note).
A: That’s a local decision. If you're doing it through acquisitions, it may make it easier to create standardized lists and easier to track what influential donors have donated. By incorporating the vendor, it's easier to create standardized info for reports. The holdings record fields are available in Analytics. “Private note” is non-public note in Analytics.

Q&A copied from the WebEx chat of Ex Libris Knowledge Days: Optimize and Streamline Alma Workflows – June 17, 2021

Q1: Is this system wide of can you set it for separate libraries in one Alma instance?

A1: institution-wide

Q2: What happens if you remove a type that already exists on an old POL? Will it affect the historical data?

A2: It will still be reportable; it will affect orders going forward but historical data is retained as-is

Q3: I'm sorry if I missed this but can you explain what you mean by ' continuity'?

A3: In this context this refers to continuous or one-time orders

Q4: Is there any way to change a purchase type after the order was placed?

A4: Once the order is sent, no

Q5: What is "standing order"?

A5: Standing orders are received on a non-regular basis, unlike the regular receiving for continuous types

Q6: in the template, is it mandatory to include the fund?

A6: the template is created from the order you're creating, so fund should be included

The recordings and PPT for this, and all other Knowledge Days sessions, can be found here: https://knowledge.exlibrisgroup.com/Cross-Product/Conferences_and_Seminars/Knowledge_Days_-_ELUNA/2021_Knowledge_Days

Q7: Is there a way to allow any user to edit a public template rather than just the creator?

A7: Acquisitions Administrator role should be able to edit in addition to the creator

Question being answered audibly: Is there a way to click done in bulk like we can in the authority control task list?

No, do not believe that it is possible.
It is on NERS right now?

Q8: Does "done" on the Activation Task List have any other function other than removing it from the list?

A8: No, "done" is for managing the task list

Q9: Is there a way for someone (Acquisitions) to complete the task list "done" even though someone else (cataloging) has activated an e-resource to get a POL to close?

A9: Yes, if you have access to the task list you should be able to mark this as "done".

Q10: Requests -- is there a way for someone (Acq) to see requests that were created by some action they did?

A10: If they are able to see the in-process items list they can filter by request type

Q11: Is there a way to not use work orders at all? I do ordering, acq, cataloging, processing, shelving, all of it -- work orders slow me down!

A11: Yes; work orders are not mandatory. They are useful especially in the case that multiple people do different tasks.

Q12: Follow up on Requests A10: So what "role" allows viewing in-process items lists? Operator? Manager/admin only?

A12: Permissions listed at the top of the doc here:
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/Resource_Requests/020Managing_Requests_and_Work_Orders

Q13: Can you tell us where to find a report of withdrawn items that includes their withdrawn date, title, barcode, and material type? Where do the withdrawn items "live", since they appear to be deleted? Thank you

A13: Take a look here at some OOTB reports including withdrawn item reports:
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/060Out-of-the-Box-Reports

Q14: Where is the Premium Services Folder? Is that available to everyone?

A14: Yes, available to all. Look here: /Shared Folders/Community/Reports/Shared Reports

Q: Can a work order be placed automatically, like anything with location of special collections get a work order?
A: Work orders are placed automatically at times, like on-the-fly check out at the circ desk and a work orders is placed on that, or if you are receiving something and choose

“keep in department” box, but not really a way to do that otherwise. You can create work orders in bulk with a job. But that’s a cool idea.

Q: How do you clear the lost in transit status? Can a cataloger do it? Does it have to go back to Circ to scan?
A: The Cataloger just needs to set “Currently At” location in Alma to be Circ Desk, then you can Scan in Item.

Q: Is there a way to manage templates for POLs in batch?
A: There is not a way in Alma; there is a way in Rialto. Much more robust template management in Rialto.

Q: Tasks seems to be visible to all even when sent to one person.
A: Depending on task list that was talked about, you can look at things assigned specifically to you or to others, depending on roles.