CARLI Event Notes from Ex Libris Implementing Acquisitions in Alma Session, July 21, 2021

Manage Acquisitions Alerts in Configuration
For those already using Acq, we learned at the sessions that there is a way to manage Acq Alerts now in Configuration. Alma Configuration > Acquisitions > General > Manage Acquisitions Alerts (so you need Acq config role) you can turn alerts on/off. One of the alerts there is "at least one reporting code is missing" so if you are not using reporting codes, you can turn this off. You can turn off selective alerts in Invoice alerts, PO Line alerts, Receiving alerts. Note: these are NOT cataloging alerts; for example, the alert that a bib record is brief.
IWU asked Jen to turn this off at IWU, but it was already off. Gloria said she's seen it before. Jen hypothesizes that maybe the alert was turned off after the bib was created. We don't know when the alert was turned off, there is no date in the list.

Q: Does turning off an individual alert turn it off for the whole institution?
A: it is for the whole institution

Review Rules
Q: I was curious about turning off the Review rules for either POs or Invoices. Has anyone done that? It is just me ordering and I manage the budget, so I am both the order and approver.
A: Yes, CARLI helped DAC do this. DAC and COD report it works very well.
Especially if you are one person doing invoicing, there are a lot of review rules in place by default. CARLI staff can help you streamline this, if desired.

Thinking of using Acq for the first time?
Jen asks: are there folks here who are not currently using Alma Acquisitions who are going through this webinar series to see if they may like to use it?
Yes: CTU, NLU, ARU, JWC

GRN: I use it, but I've been more just playing with it and trying to figure it out than using it to really track things. But I want to let Alma do more of my work
CTU: I lost my cataloger and acquisitions people so I really need the Acquisitions for Dummies version of this.
DAC: I wish I'd had this training before I set ours up. :)

Interest in Binding
ALP: We only use it for serials checkin. I'm hoping she covers binding the received issues.
A: Big yes on the binding!
CARLI: Got the sense that this series isn't going to focus on more of these advanced topics. Binding is more advanced. CARLI will see what we can learn about binding since there is interest here.

Creating new Fund structure
IIT Law: The presenter's advice about designing ledger/funds was good advice. With our first rollover in Alma, I completely restructured our ledger and made the categories that we had been using as reporting funds in Voyager allocated funds. I like being able to see in the ledgers and funds exactly where i am with the budget without having to run a report.
CARLI: CARLI thought that was really good advice as well! Post-it notes on a blank wall was another suggestion made good sense, or an app that does something like post-its. Index cards on a table top could work, too.

IIT now has Allocated Funds rather than reporting codes and finds that easier to get information about things. Reporting codes are less useful for smaller institutions, perhaps.
CARLI: ExL Webinar also pointed out how important it is to have all your stakeholders provide input on the ledger structure.
IIT: Allocated funds are now things like monographs, a/v, etc. We only buy in Law so it's simpler for us.

IIT: Yes, exactly. I don't find reporting codes useful in my small situation.
GRN: @IIT, so your funds don't necessarily match your fund structure at your institution?
IIT: Our institution has basically one fund at the university level.
GRN: Yes. I have one book line, but the others are more specific

DAC: Yes, that "internal use" structuring was something I didn't realize setting it up in the beginning.

CARLI: Webinar did allude to the fact that there are ways to integrate with a local business office, perhaps at larger institutions, but mimicking your institutional business office's structure and language may just help with communication even if they are not integrated.

Reporting Codes
GRN: I would be curious how others have used reporting codes to be more specific in their book budget line.
CARLI: when we migrated, your voyager reporting **funds** became reporting **codes** in Alma. This may or may not be as you've kept it, and you don't need to keep them this way, you can adjust it in Alma Configuration > Acq > Purchase Orders > there are 5 reporting codes
DAC: I'm thinking about revising our Reporting Codes and making more use of them. I didn't realize until now that you could do that.
CARLI: Yes, you can! When you modify these, they will be the options on your Purchase Order line, or you can Disable them to turn them off so they don't appear as an option. You can add a new row. You can export the whole list into Excel for editing and re-uploaded. The 1st 2nd 3rd etc Reporting Code levels can be different or they can be the same, that's up to you. You can edit PO Lines' Reporting Codes after the fact to add them back in or change them.

IWU: We kept our reporting codes, thinking we may use them in Analytics. But we haven't done much in that area yet.

SIM: Yes--we have a Collections Fund, and two reporting codes: Graphic Medicine and Leadership Reserve. We will soon creating a Diversity & Equity code for that recommended collection.
CARLI: CARLI worked with SIM to edit their codes recently.

DOM: I revised/updated our codes and plan to use them to designate which department selected a book or which department the book/resource will primarily support.

RVC: We use reporting codes to identify what department requestors are in and also the location or collection the item is going to (circulating vs. reference, for example).

A: We have used them to specify the subject areas of resources.

CARLI: You could use codes for accreditation type reports, for ex. how much spent on chemistry in X time period.

GRN: Does the structure of codes matter?
First code is a format code like ebook. If we wanted a code for departments, does it matter which level it is on?

CARLI: No, that's up to you so long as you know. Put the most important things to track at the 1st/higher levels, maybe Subject is most important, then the second level could be type of material.

DAC:
Can you go back and add codes to POL that have already been processed?
SIC: Reporting codes **can** be edited on closed POL's without reopening the POL. I had an example to test on.

Cost Per Use
Q: Switching gears when you're ready--Jenny from Ex Libris mentioned that you can track the per usage cost of resources based on the PO line. Has anyone done this? We have typically deleted the PO's. I'm assuming then that we need to keep them? Implications of this?
CARLI: If you watch "June 15, Managing COUNTER-Compliant Usage Data" you can see about how ICC is importing e-resource usage data. In Analytics ask for "cost per use" for an e-collection (as long as price in PO). https://www.carli.illinois.edu/products-services/i-share/alma/exl-knowledge-days-2021
CARLI: Cost per use is based on having the cost and the number of uses, then analytics can generate this, but you need to get the COUNTER-Compliant Usage Data into Alma first.
Q: Anyone work with print?
CARLI: I think it can generate this information based on the number of check-outs, like circulation, if the cost is on the PO Line. Ex Libris webinar referred to this as "cost per use based on fulfillment"

Q: The cost per use question is interesting. We brought over P.O.s but they are not connected to our activated collections or portfolios. So time consuming to clean up, but might be worth it for cost per use.
CARLI: you can attach your POs to e-collections/portfolios by linking the information on the Acquisitions tab of the active e-collection. Yes, it is a clean up project.

Getting Started with Acq
In the ExL PPT, it does list the things you need to get started:

- Ledgers and Funds - think about this ahead of time before you start doing any work in Alma
- Vendors with accounts
- Your User set up with roles
- Acquisitions work order type already set up in Configuration by default.
- Invoice and PO review rules are set by default but can be adjusted.

If you are considering starting Acq and you go through this ExL series, you can feel free to email CARLI Support for help at any time!

IIT Law: I will say that it's really great to have your POLs for gift or depository subscriptions marked that way. It then means no funding is needed and they are not part of the fiscal year rollover. I had to update a bunch of ours after migration.
CARLI: Yes, POLs do need funds unlike Voyager. Having those kinds of funds marked that way in your fund structure is helpful to keep things organized.
DAC: Technical is the catchall for things that aren't gifts
CARLI: given to the library but weren't true gifts, perhaps a bonus with purchase situation