



CARLI

TECHNICAL SERVICES Q&A: IMPLEMENTING
ACQUISITIONS AND ROLLOVER

April 26, 2023

Ex Libris Implementing Acquisitions Series

1. **Implementing Acquisitions in Alma**
2. **Ordering Electronic and Physical Resources**
3. Activating Electronic Resources and Claiming
4. Receiving Physical Resources and Post-Receiving Processing
5. Invoicing Resources
6. Automating the Acquisitions Process

Review of Session 1: Implementing

Acquisitions in Alma

Benefits of implementing Acquisitions

Acquisitions workflow

Alma configuration

Acquisitions infrastructure

- Vendor records
- Ledger and funds
- Operator roles and scopes

Decisions to make



Review of Session 2: Ordering

Ordering basics and roles

Sources for bibliographic records

- Creating brief records in metadata editor
- Selecting records from searching IZ/NZ/CZ
- Import record from metadata editor search

PO Lines

One-time orders

PO Line templates

Continuous orders

Standing orders

PO Line statuses



Best Practices for Bib Record Placement

Bibs for orders may reside in either IZ or NZ

- NZ: Bib record has an OCLC control number for automatic matching
 - NZ: Bib record will be updated by shelf-ready cataloging
 - Requires vendor order reference number on POL and incoming MARC bib
 - IZ: Bib record does not have a control number & will be cataloged manually
 - IZ: Bib record isn't sharable
 - Contractual restrictions from vendor
 - Practical limitations, e.g., bib is for a standing order or something non-bibliographic*
- * Alma offers options to orders where a bib record is inappropriate



Creating Orders for Existing Inventory

Process for adding inventory manually

- Usable for adding new POLs for existing subscriptions (i.e., you're new to acq)
- Usable for cleaning up continuous POLs that migrated poorly
- Usable for replacement copies (at least some situations)



Fiscal Period Rollover

CARLI Website: [Acquisitions Infrastructure: Funds, Rollover, Vendors](#)

Who needs to do Rollover? Everyone.

- Institutions using acquisitions: plan according to your fiscal calendar.
- Not using acquisitions: CARLI Staff will run in July.

When should you do Rollover?

- At or around the date of your new fiscal period beginning
- Once you're ready
- Consider workflow implications (e.g., selecting from multiple open ledgers)





YOUR QUESTIONS...



CARLI Technical Services Q&A, April 26, 2023. "Implementing Acquisitions." Chat log.

00:13:14 Ted Schwitzner, CARLI (he/him/his):
https://knowledge.exlibrisgroup.com/Alma/Training/Webinars/Implementing_Acquisitions_in_Alma

00:23:43 Bryan Hinds: I know in the case of Black Hawk, we were looking at starting last fiscal year, but just ran out of time. So mainly I'm here for a refresher so we can try and get it up and running this year

00:24:21 Stephanie Fletcher: I implemented acquisitions at my previous library but my new one doesn't use it, so we're still at the "thinking about it" stage and I'm back here again 🙄

00:26:05 Connie Lee: We only use Acquisitions for serials check-in. I'm interested in learning more about the binding function.

00:27:17 Lynne Ferrell: Yes, we have not bound journals for 2 years, and will begin binding again in the near future.

00:28:13 Lynne Ferrell: Thanks Ted!

00:29:14 Azungwe kwembe: I just started using it for serials check in; I want to see what else I can do in acquisitions module.

00:29:58 Jodi Craiglow: I'm interested in streamlining the process -- I know I'm using more clicks than I need to.

00:31:06 Gail Heideman: I love the "let Alma do the work for you" mindset.

00:31:35 Lori Thompson: Def, like PO Templates

00:32:50 Sylvia Choi: I am interested in Alma Acquisition without invoice.

00:35:25 Ted Schwitzner, CARLI (he/him/his):
https://knowledge.exlibrisgroup.com/Alma/Training/Webinars/Implementing_Acquisitions_in_Alma

00:35:38 Gail Heideman: If you can set up EDI, then Alma will do that work of Invoicing for you. It is the best!

00:35:57 Stephanie Fletcher: Reacted to "If you can set up ED..." with 👍

00:39:54 Jodi Craiglow: We also use Amazon heavily.

00:40:26 Lori Thompson: Us too.

00:40:33 Stephanie Fletcher: Amazon does not play nicely with Alma

00:40:49 Gail Heideman: We actually start with Purchase Requests the most, more than starting with POs. But an order always starts in Alma.

00:41:03 Jodi Craiglow: We can talk at the TSC meeting tomorrow. 😊

00:41:14 Bryan Hinds: "Amazon does not play nicely" can often be left at that 😞

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- 00:42:05 Stephanie Fletcher: Reacted to ""Amazon does not pla..." with 🤔
- 00:42:19 Gail Heideman: Purchase Requests are sometimes a little problematic in Alma, but we like it to encourage faculty requesting.
- 00:42:48 Julie Adamski: Reacted to "Purchase Requests ar..." with 👍
- 00:45:15 Michelle Gillen: IL State Library doesn't use ProQuest---we have Baker & Taylor as our main vendor (I had to put something down to do the poll)
- 00:47:02 Michelle Gillen: Yeah---they have great customer service too
- 00:47:09 Michelle Gillen: Yes we do!
- 00:48:43 Gail Heideman: The EDI workflow is the easiest, imo, and it is why I no longer order everything from Amazon.
- 00:54:01 Amanda Pippitt: Yes, it is a real timesaver. Implemented EDI through Rialto and Midwest, so we mainly use those vendors
- 00:59:40 Bryan Hinds: Yes, I think this is one area we got hung up on last time we were looking into it. The session made a lot of sense
- 00:59:44 Bryan Hinds: area
- 01:02:19 Lori Thompson: I thought this bit as really helpful! Associate a PO Line number Assign inventory manually.
- 01:05:05 Gail Heideman: I'd be interesting in hearing people's work flow for renewing streaming video.
- 01:06:16 Gail Heideman: I am trying to make sure that when our 1 year subscriptions end, we remove things, but also how the process works when renewing.
- 01:07:28 Gail Heideman: Yeah, I feel a bit unclear about what to do.
- 01:08:54 Ted Schwitzner, CARLI (he/him/his): <https://www.carli.illinois.edu/products-services/i-share/acquisitions>
- 01:20:18 Ted Schwitzner, CARLI (he/him/his): <https://www.carli.illinois.edu/products-services/i-share/acquisitions/rollover>
- 01:23:05 Ted Schwitzner, CARLI (he/him/his): <https://www.carli.illinois.edu/products-services/i-share/TechServicesQA>
- 01:23:52 Lynne Ferrell: Thank you!
- 01:24:22 Ted Schwitzner, CARLI (he/him/his): Reacted to "Thank you!" with 👍