AWG-3 Policy: Minimum vendor record information in Alma Institution Zone (IZ)

Recommend that SUNY libraries using Alma Acquisitions create vendor records following the guidelines detailed below.

Justification
Although there are a number of vendors common to all of the SUNY libraries, full use and management of the Network Zone (NZ), including shared acquisitions, is not expected to be in place by cutover.

For this reason, each member institution will need to create vendors in their Institutional Zone (IZ). Each member institution will need to add vendor records with basic information, such as the vendor’s name, code, addresses and accounts. Following these best practices will assist schools in using Alma for both Acquisitions and ERM, and will potentially make sharing information easier when the NZ is fully functional.

- Follow the Guidelines for creating Vendors in the Institutional Zone (IZ).
- Whenever possible, add as much information as possible for each vendor.
- You must have Vendor Manager permission to add vendors to IZ.

Guidelines for creating Vendors in the Institutional Zone (IZ)

- Please use following format for Vendor Names:
  - ALL CAPS.
  - Use the name of the vendor as it appears on their W-9 or invoice.
  - Insert a comma before abbreviations such as INC, LLC, etc.
  - Spell out as much of the vendor name as possible.

- Filling out the global information fields:
- For vendors listed on state-approved vendors list, consult the list for the vendor information to use to fill out the fields.
  - Please follow these guidelines for the Vendor Code:
    - Search by Vendor Code field in the IZ to ensure that there are no other vendors with the same Vendor Code. Each Vendor Code must be unique.
• Assign the Vendor Code based on the vendor's name to make it straightforward to locate.
• Use ALL CAPS and no spaces. Numerical characters are acceptable if they are part of a vendor name.
• For easier searching, keep the Vendor Code to 10 characters or less.
• Do not assign an Additional Code.
• Add account information for each vendor.
• If the vendor is registered in SFS, you can add the code in the field "Financial Code Sys." in Alma.
• Assign currency as appropriate. In most cases, this will be USD.
• Select the appropriate vendor type:
  • Material Supplier/Subscription Agent: will apply for most vendors.
  • Access Provider: access provider to electronic resources. If this is selected, then campuses will have to add an account number before the vendor shows up as Active in their IZ.
  • Licensor: provides licenses to electronic resources. If Access Provider is selected, select this as well.
  • It is acceptable to select all three types if you're not sure.
• Contact information: provide the Vendor's general contact information here. Minimum information should include email and URL address. The general contact information will remain unique and private to each IZ, even if the vendor is later shared in the NZ.
• If information for a vendor has to be updated, update the existing record instead of creating a new one.

Note - this policy will only apply to new vendor records. For campuses with migrated vendors from Aleph, retroactive cleanup to follow this policy should be handled after cutover.

Documents Consulted (June 2018)

• ExLibris:
  https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/100Managing_Multiple_Institutions_Using_a_Network_Zone

• ExLibris:
  https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/100Managing_Multiple_Institutions_Using_a_Network_Zone/06_Acquisitions_in_Consortia/030Sharing_Vendor Information_in_a_Network_Zone
• CalState: https://calstate.atlassian.net/wiki/spaces/ULMST/pages/66420833/Shared+Vendor+Records+in+the+NZ--DRAFT

• NYS OGS: https://www.ogs.ny.gov/purchase/spg/lists/gp_200.asp

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