Acquisitions Working Group December 3, 2018 Meeting Minutes

Attending: April Davies, MaryEllen Donathen, Marianne Foley, Jin Xiu Gou, Kate Latal, Kristy Lee, Sarah Maximiek, Leslie Preston, Shannon Pritting, Susanna Van Sant

(November 19, 2018 meeting was cancelled.)

**AWG 4 Best Practices and SMSP #40**
At last meeting the group Sarah presented a new document, *AWG 4 Best Practices: Using EOCR/EOD in the Network Zone*, to be developed in place of the SMSP #40 document. It will help the libraries who were using those services with Gobi and ProQuest. SUNY Metadata Standards and Policy (SMSP) kicked our review of their document back to us for more work. The new document is not step by step instructions, but policy/use statement.

Jennifer Mathers is out of the office for a few weeks. Nancy Poehlmann is returning from sabbatical and will return to co-chairing SMSP. The group reviewed the document. Kristy to ask CalState on how they handled this work. The bulk of the draft document came from OrbisCascade. After that, and a little clean-up, Sarah or Kristy to send back to SMSP, then send forward to LSP Taskforce.

**Workflow scenarios**
Sarah took the information from the reformatted document on workflow scenarios and then split it into two documents: Metadata, Discovery and Fulfillment scenarios in one and Acquisitions and ERM scenarios in the second.

April removed items that were specific to another system that were not relevant for SUNY at this time.

Final document will reference use of the 900 fields (and current LSP policy).

Kristy is working on a workflow for bringing in an OCLC record and creating an order. Sarah suggested that she consult with Laura Evans (at Binghamton). Binghamton has OCLC working with Alma. It was noted that if you bring in an OCLC record without a holding attached, things “get weird.” Kristy was interested to know who has set up OCLC profile in the Connexion client! Binghamton is working on this.

Jin noted that the scenario document is really a narrative of the workflow. We may be able to create some workflows after playing with Alma. Sarah wants to share Binghamton’s documents with others. Jin would like to see libraries sharing more.

**POL Types**
Kristy and Sarah would like us to agree on the use of POL types for every type of order so that we can capture statistics SUNY-wide. Consortial groups using Alma have seen that they should have done this when they migrated/at the beginning. The search menu will contain the POL types, but we will not be able to use all of the POL types.
Link to documentation with complete list of POL types in Alma: (https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/110Configuring_Acquisitions/070Enabling_Disabling_PO_Line_Types)

The group discussed limiting the types. Jin believes that some libraries have more categories of materials and want to make sure there are options that are appropriate for all of the libraries. Kristy agreed that the list needs to be applicable to everyone. Susanna wants to know if there is leeway for local options? Sarah envisions that there will be a standard list of options that will be used by all of the libraries.

Group discussed if we want to go forward with establishing a list of POL types to be used SUNY-wide. How are we going to come up with the list. April asked that we create a reverse doc of UPenn document. For example, we need to create a document that helps you when you have a DVD and want to know what POL Type to use.

For next meeting....
Sarah to use UPenn’s list to create a survey/document/list for group to review.