Acquisitions Working Group December 17, 2018 Meeting Minutes

Attending:
Kate Latal, Kristy Lee, Sarah Maximiek, Leslie Preston, Susanna Van Sant

Not attending:
April Davies, MaryEllen Donathen, Marianne Foley, Jin Xiu Gou, Shannon Pritting

Minimal use of Acquisitions functions in Alma
Group discussed the information that Megan Drake shared at the Alma Workshop about the minimal use of Acquisitions for libraries who have not been using ALEPH for acquisitions. Her recommendation was:
Create a single vendor; create the acquisition method gift or technical (neither require a fund); save as a public template; use this template every time you create an order.

Some campuses have very small budgets and may not see the need to track their orders in Alma. If you are paying invoices, even if not doing it in Alma, the first part of the ordering process, with having a vendor, will enable the library to get usage stats (cost per use). Some libraries that only get SUNYConnect databases may not care about usage stats.

Group talked about whether we need to have a separate recommendation for the new users/minimal use users/libraries with small budgets? Kristy asked if the group would support using the system following this streamlined method. Only about 15 libraries used ALEPH Acquisitions/Serials Module. Some decided NOT to migrate their acquisitions data. If they had vendors, the vendors migrated no matter whether there were transactions migrated. Susanna pointed out that vendor records have been for companies we pay. Now in Alma we need to have vendors for the platform or provider in order to get usage stats. This is a change.

Sarah noted that if a library does not do any purchasing of e-resources on their own, they may not need to use Alma for their own usage statistics.

It was noted that monograph purchasing should be tracked in Alma. As a state institution you need to be open and transparent. It would be preferable for the libraries to use the POL types, not just use gift or technical when creating orders. It was also noted that the AWG members are not enforcers, that the SLC should be the enforcer.

Alma POL types
Talk about the POL types continued. Sarah planned to combine the lists of the Acquisitions Material Types libraries are using in ALEPH and come up with a proposed list for POL types in Alma. AWG will then review the proposed list.
MaryEllen was curious about Megan looking for monographs using physical titles that is defined as including CD or other items, not a monograph. Sarah noted that the search options are different between functional areas in Alma.

It was recommended that to develop the POL types list we think about what we will be ordering more of in the future. What will you be ordering and not ordering at your library? How will the list of POL types work for your library?

SMSP Policies #40 and #41
SMSP Policy #40 has moved forward.
SMSP Policy #41 is about bringing records into the network zone. Sarah would like to send it back to SMSP; not for AWG to adopt/approve.

Group discussed the process of bringing records into the NZ (as it is understood currently). If you cannot find a record in the NZ or IZ, then use the OCLC Connexion client to import a bib record to the NZ. You would add your local fields in the IZ and attach your inventory in the IZ. Sarah did a walkthrough of placing a book order with a title that was not in the NZ. They had no issue bringing in the record and adding their inventory. Did not need to add local fields. Their import profile and Buffalo’s is set up. Per Kristy, we will be able to send holdings from each library to OCLC as a batch job.

Taken by Kate Latal