Acquisitions Working Group July 2, 2018 Meeting Minutes

Attending: April Davies, MaryEllen Donathen, Marianne Foley, Kate Latal, Kristy Lee, Sarah Maximiek, Susanna Van Sant

The group reviewed the Acquisitions Clean-Up Suggestions document. Sarah incorporated feedback she received before the meeting. Kristy shared the feedback from the Data Migration Task Force and the group edited the document. The options for extract Order Log data from Aleph were reviewed. At Albany, Meiling Jiao use SQL to capture some of the data that Kate is reviewing. Sarah did not have good results with Aleph Service Acq-22. Order Logs are something that some libraries will want to retain, especially user created notes.

The group discussed what happens with vendor codes that are not unique in the NZ. The vendors from each library will be going into the IZ, not the NZ. It was suggested that seeding the NZ with vendors would be helpful to libraries that have not been using Aleph for acquisitions. Kristy noted that SUNY will not be putting all vendors in the NZ, except for the vendors for databases. Sarah would like the “big” vendors, vendors used by many libraries, in the NZ. It is not clear how having vendors in the NZ will work. Historical order information will be attached to what libraries have in the IZ. Kristy to check on this.

Sarah will ask for clarification about feedback about item #7 in the list.

April asked that we indicate when this document is updated with an update date or some indication when new content was added. The group agreed that this was important.

Kate asked why the charge for the committee did not include data migration. Kristy explained that the charge was copied over from another committee’s charge and that data clean-up was not part of the work of that committee. Later it was discussed that this working group needs to work on this because of how things intersect in Alma.

The group completed review of the feedback from the Data Migration Task Force about AWG policy #1, Minimal use of Alma for acquisitions. The group removed #4,

“Alma provides the ability to interface with many campus financial systems.” There was concern that this set an expectation that some libraries will not be able to accomplish. Group will add month and year or specific date when a website or document was consulted. The document was finalized.

Kristy shared the response to the group’s feedback about SMSP policy #40: “Loading Brief Order Records: Creating Import Profiles to Load Vendor Order Records into NZ” and #41: “Loading WCP Records into NZ includes Shelf Ready” from SMSP. Since these are strictly about acquisitions workflow, SMSP wants the AWG to own the policies, especially since it is believed that the AWG will know what to do with them. The group decided to let the policies sit for a while.
The group continued work on AWG #2: Fund structure in Alma. Sarah confirmed through testing in Alma that an allocated fund cannot be added to more than one summary fund; a summary fund cannot be in more than one ledger. Susanna planned to do a little more clean-up of the document and add the date documents were consulted so the policy could be finalized at the next meeting.

The group reviewed setting the number of characters to use in each vendor code in Alma and additional details. It will be important for libraries to look to see if a vendor exists in the NZ before creating a new vendor in their IZ. Advising libraries to use vendor information in the NZ when they need to create a vendor in their IZ. Who will be working in the NZ and responsible for editing or adding vendors in the NZ is not known. It is possible that there may be a person designated at each campus.

Prep for next meeting:
Review AWG #2: Fund structure in Alma,

At next meeting:
Finalize AWG #2: Fund structure in Alma. Discuss training issues; new plan on train the trainer.