Acquisitions Working Group
March 25, 2019 Meeting Minutes

Attending: April Davies, MaryEllen Donathen, Marianne Foley, Jin Xiu Gou, Kate Latal, Sarah Maximiek, Leslie Preston, Susanna Van Sant
Not attending: Kristy Lee

Sarah asked each person to share what they have been working on:
MaryEllen Donathen (Buffalo State) shared that they receive collection level records for titles in blanket orders (as published), They are suppressed. Having trouble receiving them in Alma. Material Type coding was inconsistent in Aleph. They have to use standing order non-monograph in Alma in order to receive on them. Sarah advised that Alma is seeing these as a mismatch.

Jin Xiu Gou (Stony Brook) had questions about in person training and online training. People who went to the training did not realize that the content was acquisitions focused. She asked about the other training that is coming up.

These links were shared via the chat:
Link to the Spring 2019 In-person Training:
https://slcny.libguides.com/overview/spring2019training
Link to the guided exercises:
https://docs.google.com/document/d/17QJHt3jl5qca-Jt9OU4vPE9HB6B50V3LhXkzPpCEY/edit
Link to Acquisitions training getting started:
https://3.basecamp.com/3649838/projects/10695484
(That was the site we used for the 4-week training)

Jin asked about setting up configuration. She explained that based on what they migrated to Alma, for instance print journals, when they try to receive a title and they do not see anything happening; cannot locate the title to receive it; cannot receive. Sarah asked to work on this together at the end of the meeting.

April Davies (Cobleskill)… They did not migrate acq. Have not seen any problems in using Alma. They have been dealing with a lot of illness (flu) at their library and missed out on some training as a result.

Kate Latal (Albany) reported that she is working on learning Alma and preparing training and still reviewing the acquisitions data that was migrated. Staff in the department used the spreadsheet to test the migration of vendors and orders, but the work on testing the migration of the data is not complete.

Leslie Preston (Fashion Institute of Technology and Institutional Lead) She is doing okay. Attended the in-person training. Set up a budget and is testing against it. Tough to take all of the
time that is needed in the testing phase because it is “not real.” Planning a library “walk and talk” about Alma for the whole library on April 10th.

Susanna Van Sant (Tompkins Cortland) reported that she has been creating minimal work flows for people at different libraries; to be posted on the FAQs. Work orders set up fine; connecting it to the Circ Desk.

**Acquisitions FAQs:**
Sarah introduced discussion of the FAQs. (SLC FAQs: [https://slcny.libanswers.com/search/?t=0&g=4876&topics=Acquisitions&adv=1](https://slcny.libanswers.com/search/?t=0&g=4876&topics=Acquisitions&adv=1)) Susanna and Sarah are working on the FAQs. Logan and Heidi are in the process of merging the three acquisitions training basecamps together. Alana and Maggie are adding to the FAQs. There are twenty-nine acquisitions related FAQs right now. People can ask questions via the FAQs. The questions are being answered by people who have access to the FAQs in the libguides. New questions will be posted as new FAQs.

**Future of the AWG:**
When the group was formed, its relationship to the ERM Working Group was discussed. Sarah does not want to see AWG “die off.” There has been discussion about merging the AWG and ERMWG.
One big umbrella group and smaller groups focused on particular subjects. Sarah asked that each member let her know if they want to continue on the group or have someone to be added to it.

MaryEllen Donathen (Buffalo State) shared that the way work is organized at her library, she has not had to use an ERM. The ERM is new and has not been directly part of her work. Thinks merging is a good idea because Alma is merging the work.

Jin likes the idea of merging them; ERM is part of acq in Alma; will be easier to communicate practice and procedures moving forward.

*The group's discussion about the merger included these points.....*
People with accounting experience could be a good addition. Some libraries want to make use of EDI and/or interface Alma with the campus finance office operations. No one expressed any objection to the merger. Some members have co-workers they would like to nominate to be part of the new group. Sarah asked the members to let her know whether or not they want to continue to be in the AWG.

**Some members stayed on the call to talk about the ordering process and work order departments:**
Jin asked for advice on the receiving process; can’t get past receiving point.
Sarah advised that configuring acquisitions can be an issue for some libraries; work order department needs to be configured/scoped.
You have to select your Acquisitions Department in order to do the receiving.

Submitted by K. Latal, March 25, 2019