Acquisitions Working Group February 25, 2019 Meeting Minutes

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

Acquisitions FAQs and documents
Shannon and Logan would like to see some FAQs and public documents to provide Alma acquisitions related content. Using libanswers to try to make it easy to create pages. FAQs get pulled in via widgets and are given tags. There is a list of topics that can be used to tag each FAQ. The structure for the pages is already in the LSP libguides: https://slcny.libguides.com/c.php?g=909238
Actual content is in libanswers. We can also submit a worddoc which can be turned into FAQs.

Sarah is concerned that the content is findable; concerned that people are not using the libguides. Could use FAQs and link out to other longer documents. She is a libguide administrator, but does not have a libanswers account. Shannon explained that the tags help people locate the FAQs. Basecamp is not accessible to everyone in SUNY so moving content to the SUNY LSP libguide will make it findable/searchable.

Susanna asked and Shannon confirmed that the SUNY LSP libguide will be the repository of “official” SUNY information. Other people are also taking critical content that is on Basecamp and moving it into the libguide.

The people who provided the content for the Acquisitions Start-Up TaskForce, including Sarah and Susanna, and Alana Nuth and Margaret (Maggie) McGee who are providing the current Acquisitions Training geared toward folks who have not used ALEPH for Acquisitions or are new to acquisitions created documents that could be shared through the SUNY LSP libguide. Per Logan, there is probably overlap between the acquisitions documentation and the work being done by the E-Resources Working Group.

Susanna and Sarah are on the Start-up Taskforce and know what is happening in the Acquisitions Training and will know what docs are out there. Some AWG members see that there will be a need for the established Acquisitions departments (using ALEPH for Acq now) to received additional training.

Jin sees that value in this collaborative work (FAQs and sharing docs), but who will be responsible for what? Who will be responsible for the accuracy of the content? Kate has same question. Logan recommends anyone creating FAQs should search FAQs first to see if info is already there. There will be overlap with the E-resources group.

Logan wants the AWG to be in charge of the Acquisitions FAQs and to review them before they are posted. Sarah sees that the group would need to review the FAQs that are posted to make sure that the information is correct. AWG members could review the FAQs periodically. Per
Shannon, LSP hired some SUNY staff on part-time release time who are tasked with creating documentation. The documents they are creating may not have the same content that others who are currently using ALEPH would create (since each library has different needs and workflow). It was noted that the content that has been created (procedures for training) are not publicly available; that is the issue! Want to put up docs that have been created that may or may not be exactly the steps that a particular library would follow, but will help them.

Sarah asked Logan about members of an Acquisitions training group (for people with more acquisitions ILS experience)……Logan does not think that Jan does not have anyone who is able to provide acquisitions training at this time. Paid staff have been helping with training in this area for the new acquisitions users.

Sarah confirmed that the documents created for the current Acquisitions Training are on Basecamp (not yet available publicly via the LSP libguides).

Kate expressed her concern about how some of the ExLibris training has (at times) been incomplete because the steps did not go as planned and/or the workflow could not be completed within the allotted time; resulted in incomplete understanding of the process being presented when it was not completed. To address this, Shannon would like to know what training topics (advanced) we need/would like and he will try to schedule them and to ask ExLibris to provide the steps provided in the training session.

Sarah asked Shannon to ask ExLibris what the VENDOR REFERENCE NUMBER is for and is it searchable? It looks like it would be a great way to link back to a vendor, if you update the vendor record, but may would not be helpful if it is not searchable. (This topic is in the draft FAQs in AWG documents on Basecamp.)

Sarah advised that we delay the discussion about the future of the AWG to our next meeting!

The group briefly discussed scheduling the FYC (or EOY) in ALEPH. Per Shannon and Kristy, it has to be based on when the final migration forms will be pulled for each library and when the final data migration forms are due to ExLibris (May 29th). Fiscal year in ALEPH needs to be closed before the technical freeze. Per Kristy and Shannon, it needs to be done by three days before first groups technical freeze which is May 29th. Based on that Kristy said the FYC (or EOY) in ALEPH must be completed by Friday, May 24th.
ExLibris wants the migration forms all at the same time. If the Fiscal Year info is NOT correct in the migration form, the funds will not migrate correctly; they will not function. OCLC record pull does not impact this when to do EOY/FYC in ALEPH.

Next meeting date to be determined because the In-person training at SUNY Poly conflicts with our next meeting. Sarah to review schedule and propose a date.

**For next meeting…**
Review meeting minutes and make changes/edits as needed.

Submitted by K. Latal, Feb 25, 2019