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5-12-2017

Monograph Ordering in Alma

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Repository Citation

Seago, Kate, "Monograph Ordering in Alma" (2017). *Library Presentations*. 170.

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Monograph Ordering in Alma

By

Kate Seago



Landscape at UKY

- Fiscal year is July 1 to June 30
- Monograph Budget FY16
 - \$864,695
 - GOBI/YBP Share
 - \$467,735
- Shelf ready, PromptCat, EOD, EDI
- Monograph unit consists of Library Specialist, 2 Library Technicians, and student support
- Manages from point of order to receiving, invoicing and copy cataloging



University of Kentucky 2015

- Undergraduate approval plan – P & E
- Graduate approval plan – P & E
- DDA plan
- Firm order via GOBI using file loading
- EDI invoicing
- Standing orders

see blue.™

Changes for 2016

- Migrate from Voyager to Alma – January 20 Go Live Date
- Finish a process of centralizing acquisitions functions with Medical Center
- Migration to the OCLC WorldShare platform in Spring 2016

Spring 2016 Post Migration

- Learning ins and outs of system
- Workflow of when to receive items
- Preferred to receive invoice after trying other options
- Dealing with funds running out of money

Putting the Pieces Back

- Re-establish file loading
- Started EDI and delayed it
- Re configured file loading after OCLC platform change
- Muddled through to end of fiscal year

New Fiscal Year FY17

- New fund structure
- Established invoice connection with SAP
- More familiar with Alma functionality
- Burp in August with OCLC WorldShare with our undergraduate plan

FINALIZE MEDICAL CENTER

- Reviewed the Medical Center account
- Walked through all the approval plans, standing orders, firm orders, etc
- Agreed to merged accounts

GOBI API SETUP

- Get API Key
- Review GOBI documentation
- Setup lists of reporting codes, libraries, and locations and send to YBP/GOBI
- Change ALMA invoice review rules
- Retrain selectors and staff

ORDERING – SELECTOR ROLE

File Version

- Select items in GOBI
- Provide fund, location, format
- For ebooks, choose option
- Notes for Acquisitions
- Send to selection cart

GOBI API

- Select items in GOBI
- Provide fund, library, location, reporting code
- For ebooks, choose options
- Notes for Acquisitions
- Send to selection cart



ORDERING - ACQUISITIONS

File loading – 24 to 48 hours

- Pre order search selections
- Move items to export cart
- Final review and send
- File goes to server
- Load file into Alma
- Review and approve

GOBI API - Instantaneous

- Pre order search selections
- Move items to order cart
- Final review and send
- Item goes to Alma
- See order number in GOBI
- Check In review for items with issues



GOBI API EXPERIENCE

- Staff and selectors enjoy the immediacy.
- No more lost files
- Harder for selectors even with templates.
Reporting codes below the fold
- Improve the GOBI API ability to detect and choose what is a matching record

FEBRUARY GLITCH

- Alma release resulted on all items going to our default location
- First, thought locations were errors
- Tested records
- Reported problem to Ex Libris
- Work around – default API to review

see blue.™

NEXT STEPS

- Work with selectors on templates
- EDI Invoicing with YBP/GOBI
- Understanding community zone for ebooks and when physical records overlay CZ records

CONTACT INFORMATION

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