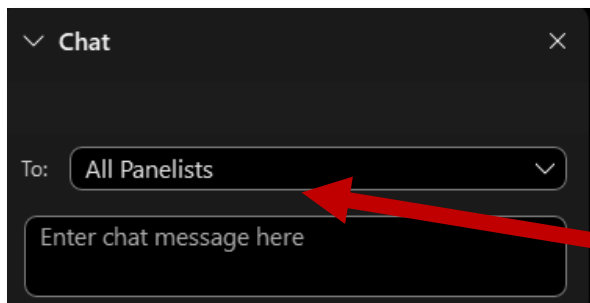


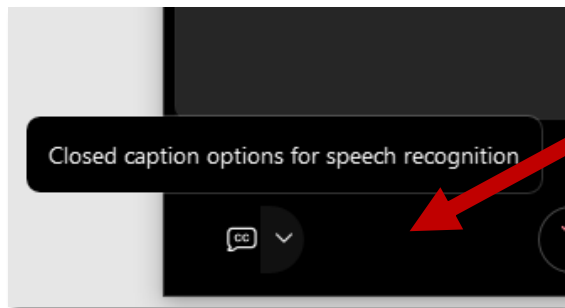
## Implementing Acquisitions in Alma

# Session 6: Automating the Acquisitions Process in Alma

# A few points about WebEx



- Technical issues? Exit and rejoin the WebEx session.
- Questions should be submitted to **All Panelists** in the via WebEx Chat.
- Turn captions on and off in the lower-left corner of the WebEx screen.
- The recording will be made available on the series dashboard.



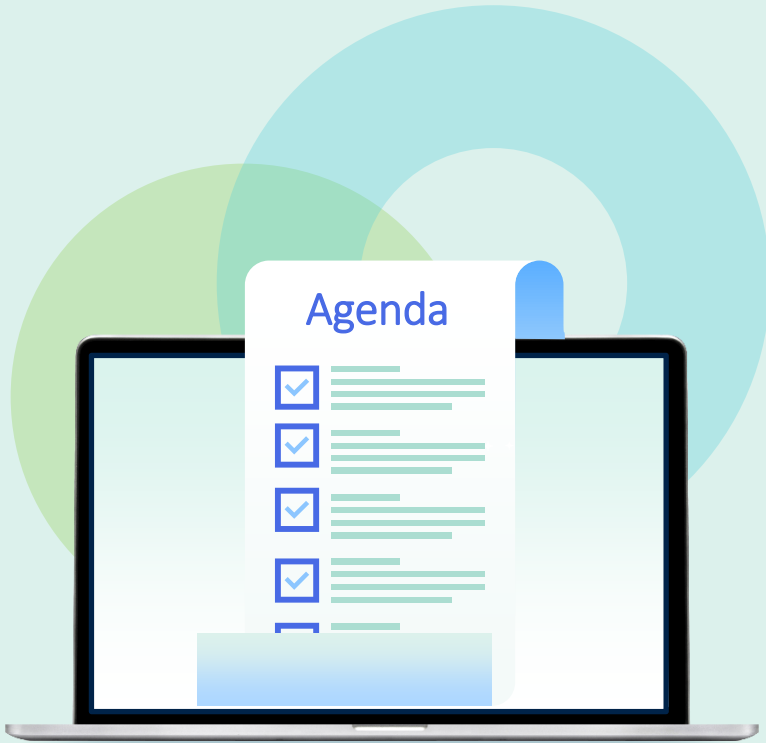
# Implementing Acquisitions in Alma

	Session Name	Dates
1	Implementing Acquisitions in Alma	April 13
2	Ordering Electronic and Physical Resources	April 20
3	Activating Electronic Resources and Claiming	April 27
4	Receiving Physical Resources and Post-Receiving Processing	May 4
5	Invoicing Resources	May 18
6	<b>Automating the Acquisitions Process</b>	<b>May 25</b>

An illustration of a laptop with a white agenda overlay on its screen. The agenda has the word 'Agenda' at the top and a list of five items, each with a blue checkmark in a box. The background features three overlapping circles in light blue, green, and light blue, with a blue tab-like shape on the right side of the agenda.

## Agenda

- Automating Workflows
- Import Profiles (EOD)
- Electronic Data Interchange (EDI)
- Real-Time Ordering
- Finance (ERP)
- Monitoring Jobs



- **Automating Workflows**
- Import Profiles (EOD)
- Electronic Data Interchange (EDI)
- Real-Time Ordering
- Finance (ERP)
- Monitoring Jobs

# Acquisitions Workflow



# How Could Using Acquisitions Benefit You Today?

## 1. Automatic inventory creation

- Display of information in Alma
- Display of information in Discovery

## 2. Tracking how money is spent

## 3. Availability of cost-per-use information



# Take Acquisitions Further

- Implement Acquisitions in Alma with **manual workflows**
- Use communication standards and files to **manually import and export** data, reducing double work in multiple systems
- **Automate workflows** by scheduling data transfer between systems



# Take Acquisitions Further—Ordering

*Workflow is dependent on vendor and their integration options*

## **Manually create order in two systems**

- Create orders manually in Alma and vendor system (Amazon)

## **Create order in vendor system and import into Alma**

- Create orders in vendor system and manually import data into Alma (EOD)

## **Create order in one system with scheduled export or import to other system**

- Create orders in Alma and automatically export data to vendor via email or EDI
- Create orders in vendor system and schedule import into Alma (EOD)

# Take Acquisitions Further—Invoicing

*Workflow is dependent on vendor and their integration options*

## **Manually create invoice in Alma**

- Create invoices in Alma manually or from a PO

## **Invoice creation in Alma from import**

- Create invoices in Alma from a file (Excel or EDI)

## **Invoices created in Alma with a scheduled import**

- Automatically import invoices in Alma using EDI

# Take Acquisitions Further—Claiming

*Workflow is dependent on vendor and their integration options*

## **Enter claim data in vendor interface**

- Notification created in Alma; staff enter claims in vendor interface

## **Manual export of claim data**

- Notification sent manually from Alma to vendor

## **Scheduled export of claim data**

- Notification sent automatically from Alma to vendor (email or EDI)



- Automating Workflows
- **Import Profiles (EOD)**
- Electronic Data Interchange (EDI)
- Real-Time Ordering
- Finance (ERP)
- Monitoring Jobs

# Import Profiles

Ordering activity is done in the vendor interface

- Order data manually imported into Alma
- Order data automatically imported into Alma

Staff working in one interface

- Reduced effort
- Increased accuracy

1. Export file of bibliographic record(s) containing PO and PO line data (Embedded Order Data)
2. Import file into Alma using New Order Import Profile



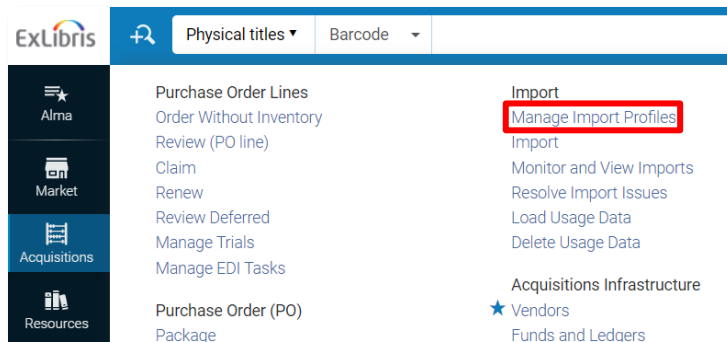
# Import Profiles

- Creating an import profile requires

**Acquisitions Administrator** or **Catalog Administrator** role

- You may be familiar with this tool from your cataloging workflows
- We will review the **New Order** import Profile

*Acquisitions > Import >  
Manage Import Profiles*



# Import Profiles

## Profile Details tab

- List of options under **Originating System** can be customized *Configuration > Resources > Record Import > Originating Systems for MD records*
- Import Protocol
  - Upload File/s (Manual import)
  - FTP (Automated import)
    - Scheduling
    - FTP information
- Status must be set to **Active** for profile to appear under *Acquisitions > Import > Import*

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma Online Help \(English\)/040Resource\\_Management/060Record\\_Import/020Managing\\_Import\\_Profiles](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/060Record_Import/020Managing_Import_Profiles)

# Running an Import Profile

Staff member must be **Purchasing Manager** or **Purchasing Operator** to run an import profile job

*Acquisitions > Import > Import*

1. Click **Run** from the row action menu of the selected import rule
2. Select file
3. Submit the job



# Running an Import Profile

**Test** in Sandbox

**Test** in Production

**Schedule** import on the **Profile Details** tab  
of the import profile

# Import Profiles

## The bib records I received with my order are brief records

- Create a **Repository** import profile to import higher quality bib records and merge or overlay existing records as part of the post-receiving workflow
- Work in Alma MD Editor to search for a better record and merge or overlay existing record.

In either case, inventory will be linked to the improved bib record

## Some materials we order are preprocessed

- Create an **Update Inventory** import profile to update inventory based on vendor reference number of PO line reference number

# Import Profiles

## My library has a Network Zone

- Work with your NZ administrator to determine workflow
  - Some NZs have bibs for electronic inventory, others have only bibs for physical resources
  - NZ bibs typically have minimum standards (often an OCLC number)—brief vendor records may not meet that criteria
  - Know what belongs in the NZ and what belongs in your IZ
  - Import Profiles can be copied from the NZ to the IZ

# Import Profiles

InstitutionNetworkCommunity

Run Import

1 - 1 of 1

Profile description

Q

Profile type : All

Profile name

1Network Import Profile

< Import Profile Details

Profile Details

Use Network Zone

Profile name \*

Profile description



- Automating Workflows
- Import Profiles (EOD)
- **Electronic Data Interchange (EDI)**
- Real-Time Ordering
- Finance (ERP)
- Monitoring Jobs

# Electronic Data Interchange (EDI)

**EDI is a method of communication between an institution and its vendors.**

Business-to-business communication standard managed by EDItEUR

<https://www.editeur.org/>

Alma supports the EDIFACT standard

<https://www.editeur.org/31/Library-Book-Supply/>

# Electronic Data Interchange (EDI)

1. Does your vendor utilize EDI communication?

<https://developers.exlibrisgroup.com/alma/integrations/edi/>

\*note facets in the Integrations/EDI menu in the ExL Developer Network

2. Which workflow(s) does the vendor offer?

- Purchases
- Order Responses
- Claims
- Cancellations
- Invoicing

3. Which workflow(s) do you want to utilize in your library?

# Benefits of EDI

- Staff is working in a single system
  - No duplicate entry
  - Accuracy of information
- Data transmission options
  - Manual
  - Automatic
- Supports multiple workflows
  - Cancellations
  - Claims
  - Invoices
  - Purchase Orders
  - Order Responses





# Setting up EDI in Alma

*Acquisitions > Acquisitions Infrastructure > Vendors > [select vendor] > EDI Information tab*

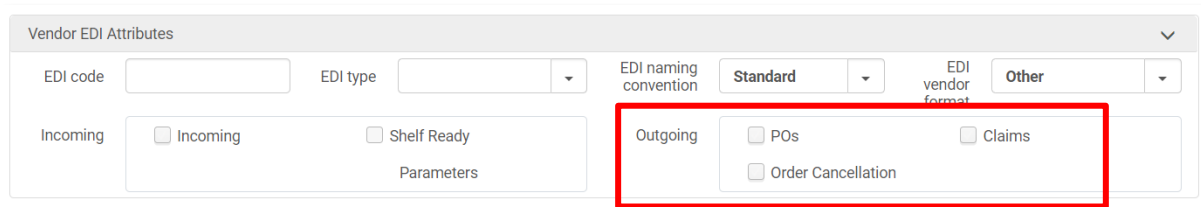
Utilize the documentation for detailed information about the integration options and message segments

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/090Integrations\\_with\\_External\\_Systems/020Acquisitions/020Electronic\\_Data\\_Interchange\\_\(EDI\)#Configuring\\_EDI\\_for\\_a\\_Vendor](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/020Acquisitions/020Electronic_Data_Interchange_(EDI)#Configuring_EDI_for_a_Vendor)

# EDI—Outgoing Messages

## Alma → Vendor

- Purchase Orders
- Claims
- Order Cancellations



Vendor EDI Attributes

EDI code  EDI type

EDI naming convention **Standard** EDI vendor format **Other**

Incoming ☐ Incoming ☐ Shelf Ready

Parameters

Outgoing ☐ POs ☐ Claims

☐ Order Cancellation

Staff work in Alma

Information is sent to vendor

File transfer can be automated

# EDI—Incoming Messages

## Vendor → Alma

- Invoices
- Order Responses : Shelf Ready (barcode, item policy, etc.)
- Order Responses : Order Report (orders accepted by the vendor)
- Order Responses : Claim Responses (serials)

Vendor EDI Attributes

EDI code  EDI type  EDI naming convention  EDI vendor format

Incoming ☐ Incoming ☐ Shelf Ready [Parameters](#)

Outgoing ☐ POs ☐ Order Cancellation ☐ Claims

Files from vendor are loaded into Alma

File transfer can be automated

# Reviewing/Approving Invoices created by EDI

*Configuration > Acquisitions > Invoice > Invoice Review Rules or Invoice Approval Rules*

- Create a rule that sets all invoices created by EDI to an In Review or Approval status
- Staff go to *Acquisitions > Receiving and Invoicing > Review (Invoice) or Approve (Invoice)* to process invoices

The screenshot shows the 'Invoice Review Rules' configuration window. At the top, there are 'Cancel' and 'Save' buttons. The main section is titled 'Invoicing Review Rule Editor'. It contains several fields: 'Name' (set to 'Invoice created via EDI'), 'Description' (empty), 'Created By' (Ex Libris Staff), 'Created On' (08/16/2021), 'Updated By' (Staff, Ex Libris), and 'Updated On' (08/16/2021). Below this is the 'Input Parameters' section, which includes 'AssertionCode in' (set to 'The invoice was created by an external system and need to be reviewed.'), 'VendorCode in' (set to 'Any'), 'InvoiceLineNumber in' (set to '\*'), and 'InvoiceCreationFormOptions in' (set to 'EDiteur Invoice Message'). At the bottom, the 'Output Parameters' section shows 'Result' set to 'True'.

An illustration of a laptop with a silver base and a black bezel. A white rectangular overlay is positioned in front of the laptop screen. The overlay has the word 'Agenda' in blue at the top. Below it is a list of five items, each consisting of a blue square checkbox with a white checkmark, followed by a horizontal line of green text. The background features three overlapping circles: a large light blue one, a medium green one, and a small light blue one.

## Agenda

- Automating Workflows
- Import Profiles (EOD)
- Electronic Data Interchange (EDI)
- **Real-Time Ordering**
- Finance (ERP)
- Monitoring Jobs

# Ordering Platforms

- Web-based platforms for searching, selection, and ordering
  - Print
  - Electronic
- Supports different acquisition models
  - Firm Orders
  - PDA
  - DDA
    - ATO (Access To Own)
    - STL (Short Term Loan)



# Real-Time Ordering

**Real-Time Ordering** integration with Alma via Application Programming Interface (API) tools

- APIs offer two-way continuous communication between the systems
- Work is done in one system and shows up in the other within seconds
- No files to load or schedule
- No cost to use APIs in Alma or OASIS

# Real-Time Ordering

- Real-Time Ordering Overview on the ExL Developer Network
  - Workflow
  - Link to setting up integration in Alma

<https://developers.exlibrisgroup.com/blog/Real-time-Acquisitions/>

- Real-Time Ordering documentation including vendor lists supported by OASIS and GOBI

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma Online Help \(English\)/020Acquisitions/020Purchasing/020Creating PO Lines/020Real-Time Acquisitions](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/020Creating_PO_Lines/020Real-Time_Acquisitions)



# Rialto

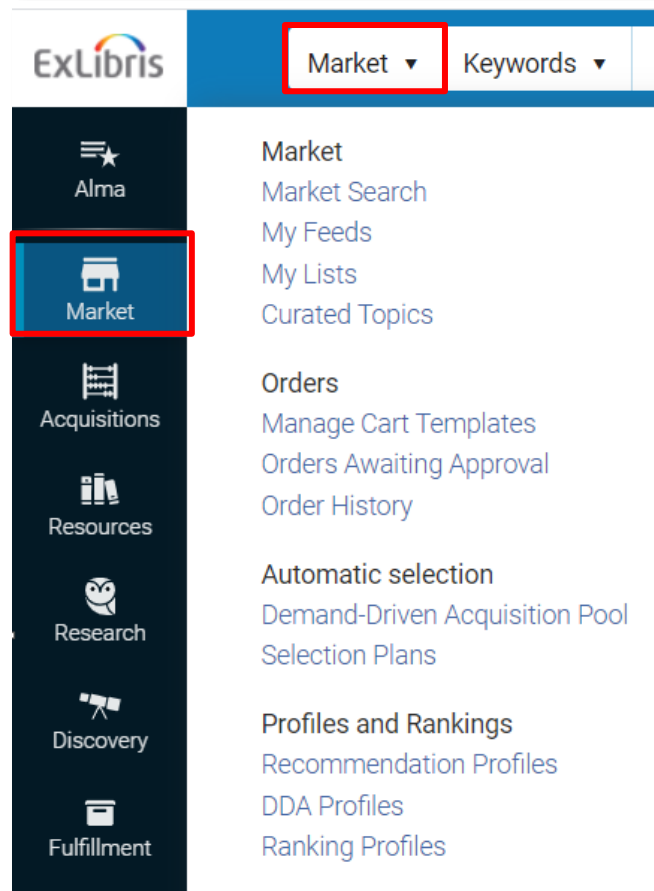
- Selection and acquisition solution that is built into Alma
- ProQuest product

For more information, including publisher and platform availability

<https://about.proquest.com/en/products-services/Rialto/>

Rialto documentation in the CKC

<https://knowledge.exlibrisgroup.com/Rialto>



An illustration of a laptop with a white agenda overlay on its screen. The agenda has a blue header and a list of items, each with a blue checkmark and horizontal lines representing text. Behind the laptop are three overlapping circles in shades of green and blue. The entire scene is set against a light teal background.

## Agenda

- Automating Workflows
- Import Profiles (EOD)
- Electronic Data Interchange (EDI)
- Real-Time Ordering
- **Finance (ERP)**
- Monitoring Jobs

# Finance Integration

Enterprise Resource Planning (ERP) system—Business office

## Invoice Export

- Alma sends an XML file to an FTP location
- Financial system fetches and processes file

## Invoice Import

- Financial system sends XML file containing payment status information to an FTP location
- Alma fetches and processes file

# Invoice Payment

Invoice has been approved and has moved on to the payment stage

List of potential invoice statuses

- **Ready to be Paid** - The invoice was approved and is ready to be sent to the ERP **Alma → ERP**
- **Waiting for Payment** - The invoice was approved and sent to the ERP (or skipped the ERP if the institution does not use one) **Alma ← ERP**
- **Closed** - The invoice is paid and closed

# Invoice Payment Configuration

*Configuration > Acquisitions > General > Other Settings*

## Q1 Are you integrating with ERP system?

- invoice\_skip\_erp
  - true = Alma is **not** sending invoice to ERP
  - false = Alma is sending invoice to ERP

## Q2 Do you receive notification from ERP that an invoice was paid?

- handle\_invoice\_payment
  - true = yes (data can be entered in Alma automatically or manually)
  - false = no (invoice is closed)

# Finance Integration

## Orders Export

- When a PO is about to be sent to the vendor, it can be exported to the financial system

## Orders Import

- Institutions that integrate with the financial system based on ERP number will have POs that are about to be sent to the vendor waiting in review until the ERP approves them and sends an ERP number.

## Synchronize Fund Information

- You use the Fund Allocation Loader to allocate amounts to the funds in Alma.

<https://developers.exlibrisgroup.com/alma/integrations/finance/>

An illustration of a laptop with a white agenda card floating in front of its screen. The card has the word 'Agenda' at the top and a list of five items, each with a blue checkmark in a box. The background features three overlapping circles in light blue, green, and light blue, with a blue tab-like shape on the right side of the agenda card.

## Agenda

- Automating Workflows
- Import Profiles (EOD)
- Electronic Data Interchange (EDI)
- Real-Time Ordering
- Finance (ERP)
- **Monitoring Jobs**

# Monitoring Jobs in Alma

Manual and scheduled jobs can be monitored and reviewed under  
*Admin > Manage Jobs and Sets > Monitor Jobs*

Monitor Jobs

Scheduled Running History

1 - 20 of 30 Name

Refresh

Job Category : All Status : All Submit Date Range 05/22/2023 - 05/23/2023

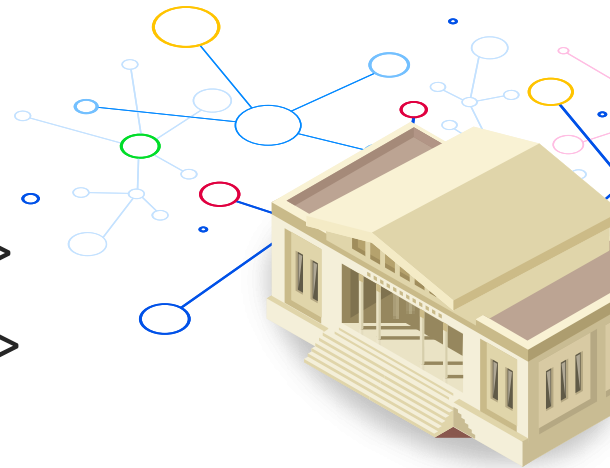
Name	Process ID	Records processed	Records with exceptions	Job Category	Operator	Submit Date	Start Date	End Date	Status
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# Monitoring Jobs in Alma

Relevant jobs for Acquisitions integrations:

- Metadata Import: <import profile>
- EDI – Load Files <vendor name>
- ERP Export Using Profile <integration profile>
- ERP Import Using Profile <integration profile>



[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/050Administration/070Managing\\_Jobs/030Scheduled\\_Jobs](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/030Scheduled_Jobs)



### Agenda

- ☒ \_\_\_\_\_
- ☒ \_\_\_\_\_
- ☒ \_\_\_\_\_
- ☒ \_\_\_\_\_
- ☐ \_\_\_\_\_

- Automating Workflows
- Import Profiles (EOD)
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- **Bonus: New PO Line Task List**

# New Unified PO Line Task List

Adjustments to the layout of the PO line task list will streamline the processing of PO lines. Users will be able to:

- Review all PO lines in all statuses in a single unified list
- Assign PO lines in any active status to users
- Access entities related to the PO line and easily navigate back to it when done

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Materials/010Roadmap/Alma\\_Roadmap\\_Highlights\\_\(2023-2024\)/Acquisitions#PO\\_Line\\_Workflows\\_-\\_Enhanced\\_UX](https://knowledge.exlibrisgroup.com/Alma/Product_Materials/010Roadmap/Alma_Roadmap_Highlights_(2023-2024)/Acquisitions#PO_Line_Workflows_-_Enhanced_UX)





# Resources

# Resources

- CKC Documentation

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/020Acquisitions](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions)

- Acquisitions LibGuide

<https://exlibris.libguides.com/alma/acquisitions>

- Series Dashboard

[https://knowledge.exlibrisgroup.com/Alma/Training/Webinars/Implementing\\_Acquisitions\\_in\\_Alma](https://knowledge.exlibrisgroup.com/Alma/Training/Webinars/Implementing_Acquisitions_in_Alma)

# Premium Services - a more individualized approach



Premium Services are one-on-one services to customers that are interested in workflow optimization, individualized training, hands-on configuration, or other individualized assistance with Ex Libris products

[Premium.Services@clarivate.com](mailto:Premium.Services@clarivate.com)



# Thank you!

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Please fill out the survey that  
will appear when you close the  
WebEx meeting