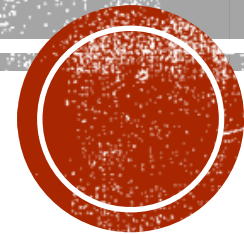


# DON'T PANIC (YET)!

ALMA Acquisitions / ERM /  
Link Resolver / P2E

GUGM 2016



# AGENDA

Introductions

Takeaways

In the Zone(s)

Migration Process

To Migrate or Not To Migrate?

ERM

Eyes on the Prize - Benefits of Alma

Takeaways (Again)

Q&A



# INTRODUCTIONS

- Lauren Fancher, GALILEO
- Kat Hart, Georgia State
- Ken Henslee, GALILEO
- Bob Trotter, GIL
- Elizabeth Winter, Georgia Tech



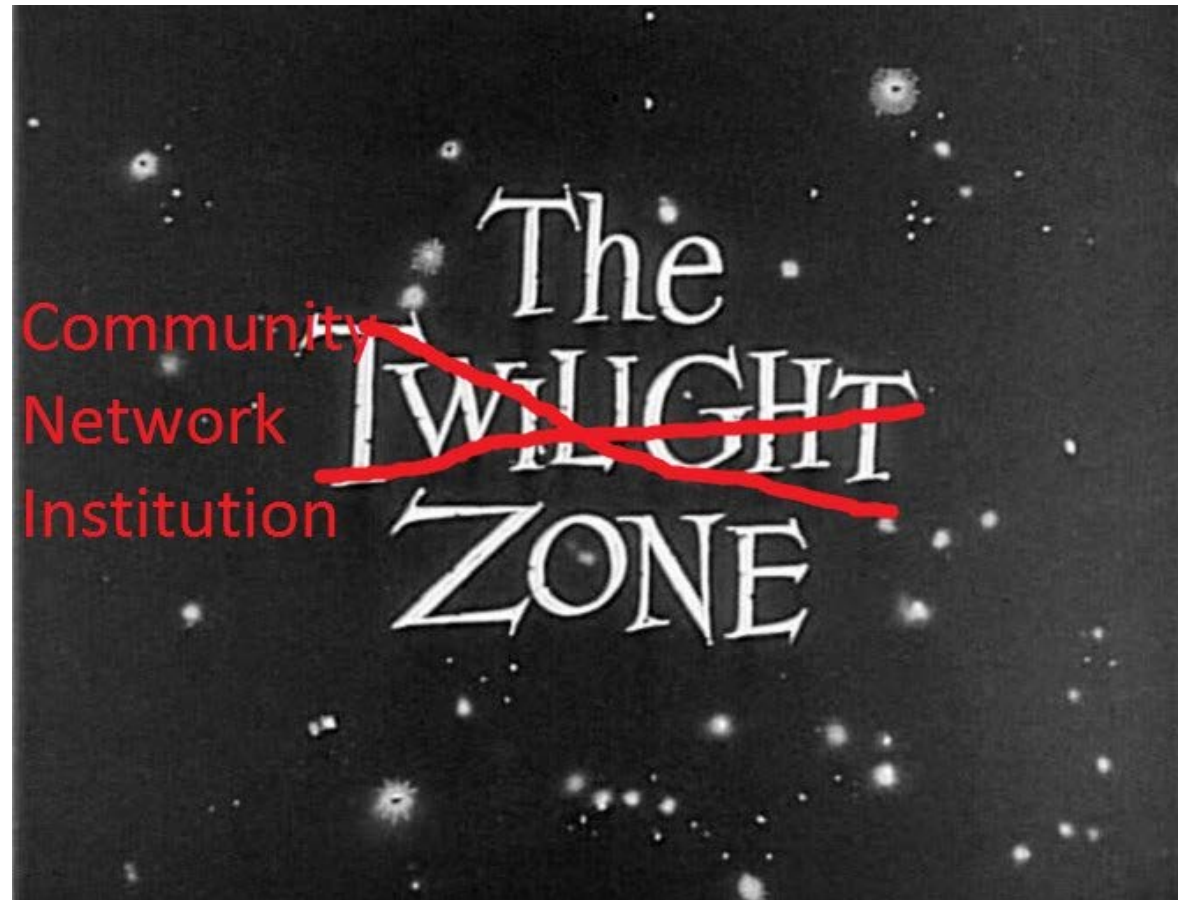
# TAKEAWAYS

- We are all learning!
- Prioritize - Key questions to ask:
  - What does success look like?
  - What can you actually do, in what time frame, given your resources?
- Alma has some real benefits we are starting to see!
- Use the ALMA-L list and search the archives:  
<https://listserv.nd.edu/cgi-bin/wa?SUBED1=alma-l&A=1>
- Talk with others who have already gone live
- Alma Acquisitions courses (100-700-level)

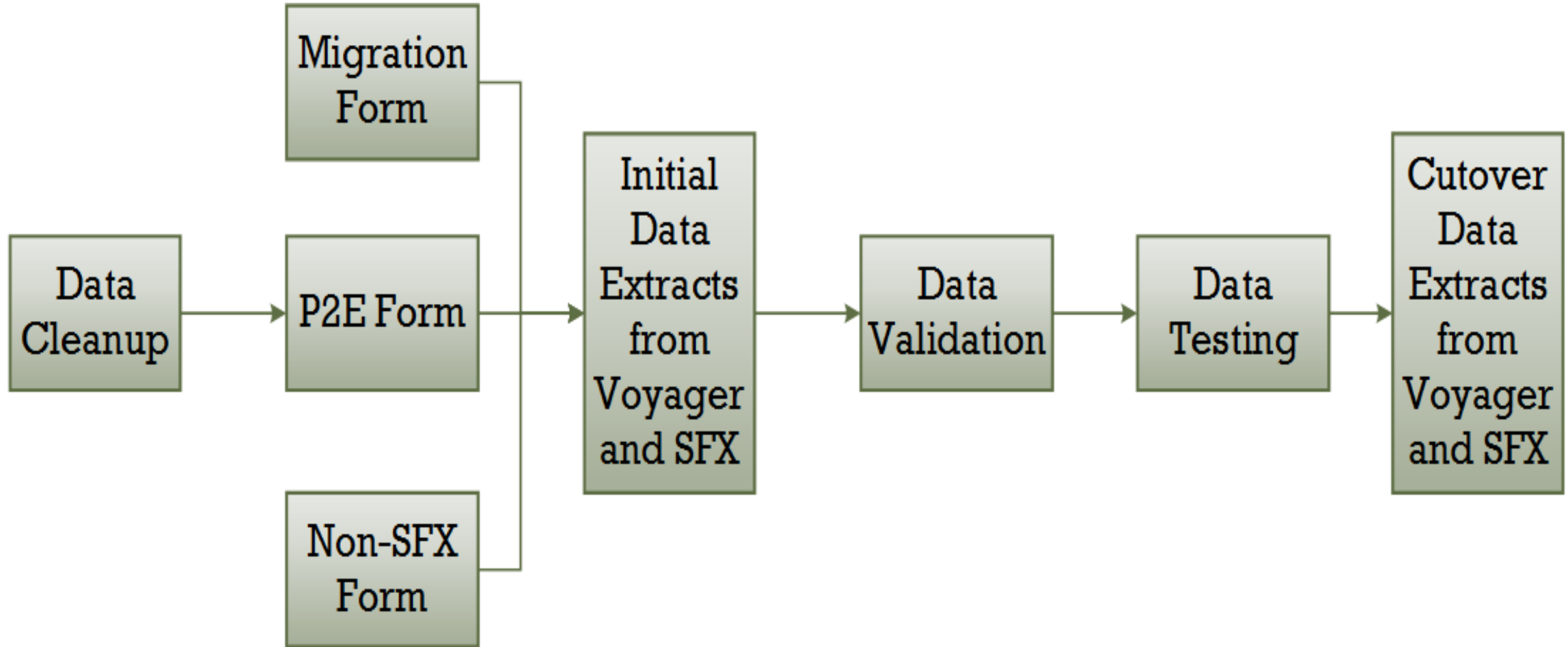


# IN THE ZONE(S)

What are the roles of the three Alma Zones?



# MIGRATION PROCESS



# MIGRATION PROCESS

- **Key questions (again):**
  - What does success look like?
  - What can you actually do, in what time frame, given your resources?
- **Helpful ExLibris documents:**
  - *Getting Ready for Alma and Primo Implementation (Appendix B-Optional Data Preparations)*
  - *Voyager to Alma Migration Guide*
  - *Testing Acquisitions Data Migration to Alma (after initial load)*
  - *Preparing for Alma Migration*



# MIGRATION PROCESS

- UGA's experience:
  - Pleased with the results of ACQ data migration.
  - All data appears to have migrated.
  - A few outstanding issues with "order statuses." Some of these are a result of different terminology used in ALMA versus Voyager.
- GA Tech's experience:
  - Overall, pleased with the results.
  - Would have done more work with P2E with more time.
  - Think about old STOs if you choose to close "orders older than X years."
  - Snafu - MARCIt records migrated "accidentally"





# TO MIGRATE OR NOT TO MIGRATE?

- How do you use Voyager?
- How much can you migrate?
- What are the Pros and Cons of migrating?

It's work either way

- Migrating? Issues to consider:  
How clean is your data?

Funding structure, Vendors, Purchase Orders



# TO MIGRATE OR NOT TO MIGRATE?

## Voyager Data Clean Up Spreadsheet Acquisitions tasks

8. Identify vendors with very few invoices or POs. Make a decision as to whether or not these vendors can be deleted. [Has query]
9. Approve or Delete any purchase orders which are pending and you would like to send to vendors and/or be converted to Alma. [Has query]
10. Remove any purchase orders which are old drafts or tests. (Work on first; Mandatory task)
11. Approve any invoices for items that have been received but not yet paid. (Work on first; Mandatory task) [Has query]
13. Delete components attached to claimed line items (Mandatory task) [Has query]
14. Search for potential vendor duplicates (Mandatory task) [Has query]
15. Find and correct funds that don't have unique names/codes (Mandatory task) [Has query]
16. Find and correct funds that are not actively in use on line items (Mandatory task)
17. Identify and correct duplicate EDI Connection Profiles. (Work on first; Mandatory task) [Has query]
20. For any standing orders and subscriptions that are old, should have been closed, or require some other kind of investigation when still active but with nothing received in years, take action to clean up. (Mandatory task) [Has query]
21. Clean up any POs attached to MARCIt! Records. (Mandatory task)
37. Where possible, consolidate fund codes to simplify your ledger (Recommended task)
38. Delete unused or no-longer-used vendors. (Recommended task)
39. Consolidate Item Types/Material Types (for example, BK, Book, Monograph). (Recommended task) **[Not sure if this is Acquisitions or Cataloging]**
51. Establish clear categorization of e-resources and electronic-package resources. (Optional task)

### ■ P2E Process



# TO MIGRATE OR NOT TO MIGRATE?

The screenshot shows the Alma system interface. At the top, there is a navigation bar with the Alma logo, a search bar, and navigation links for Tasks, Analytics, and the current location: Main Library - MAIN Acquisi... Help Walker, Dana. Below this is a 'Find Invoices' section with 'Cancel' and 'Save' buttons. The main content area shows 'Vendor name Ebsco Subscription Services' and 'Vendor code ebsco'. A series of tabs includes Summary, Contact Information, Contact People, EDI Information, Invoices, **PO Lines**, Communications, Attachments, and Notes. A search bar is present with 'Find:' and 'in: PO Line Title' and a 'Go' button. Below the search bar is a pagination control showing '1 - 20 of 6,207 Records' and a 'Tools' button. The main table displays a list of PO Lines with columns: Invoice #, Date, Owner, Creation From, Creation Date, Last Updated Date, # of Lines, Vendor Account, and Total Price. Each row has an 'Edit' button. At the bottom right, there is an 'Actions' button.

Invoice #	Date	Owner	Creation From	Creation Date	Last Updated Date	# of Lines	Vendor Account	Total Price	
1 <a href="#">0005122-2016</a>	02/13/20...	University of Georgia	Manually	02/18/2016	05/11/2016	1	-	-15.53 USD	<a href="#">Edit</a>
2 <a href="#">0006923-2016</a>	02/13/20...	University of Georgia	Manually	02/18/2016	02/29/2016	<a href="#">15</a>	-	-2,188.09 USD	<a href="#">Edit</a>
3 <a href="#">0038420-2016</a>	02/13/20...	University of Georgia	Manually	02/18/2016	02/29/2016	<a href="#">18</a>	-	822.95 USD	<a href="#">Edit</a>
4 <a href="#">0024657-2016</a>	02/13/20...	University of Georgia	Manually	02/18/2016	02/29/2016	<a href="#">27</a>	-	14,358.29 USD	<a href="#">Edit</a>
5 <a href="#">0568092-2016</a>	02/03/20...	University of Georgia	Manually	02/04/2016	02/29/2016	<a href="#">2</a>	-	16,553.96 USD	<a href="#">Edit</a>
6 <a href="#">0602882-2016</a>	02/03/20...	University of Georgia	Manually	02/04/2016	02/29/2016	<a href="#">5</a>	-	282.87 USD	<a href="#">Actions</a>



# Consortial eResources, SFX Migration, GALILEO MARC Records

- GALILEO staff participating in Vanguard process
- Report of findings has been turned over to the Core Team for review before going to the Acquisitions / ERM Team
  - GALILEO resources will be managed in the Network Zone
  - Different approaches to SFX/e-resource migration based on flavor of SFX
  - Differences between SFX KB and ALMA CZ (Gaps)
  - GALILEO MARC records will not be migrated within Voyager data. Similar MARC records should also be suppressed.
  - Different MARC record collections have different strategies



# ERM

- Link ALL of your eResources data together...finally!
- Manage licenses
- Community Zone = a central knowledge base
- Key challenge: When to use CZ and when not to



# EYES ON THE PRIZE - BENEFITS OF ALMA

- Alma's great strength is electronic resources
- Alma Analytics is powerful and has a good user interface = no more ODBC drivers, crazy SQL, or pages of Voyager data tables!
- Potential for greater efficiencies across USG institutions - collaborative collection development and sharing of records in NZ



# TAKEAWAYS (AGAIN)

- We are all learning!
- Prioritize - Key questions to ask:
  - What does success look like?
  - What can you actually do, in what time frame, given your resources?
- Alma has some real benefits we are starting to see!
- Use the ALMA-L list and search the archives:  
<https://listserv.nd.edu/cgi-bin/wa?SUBED1=alma-l&A=1>
- Talk with others who have already gone live
- Alma Acquisitions courses (100-700-level)



Q&A

