



Alma-GOBI/YBP Acquisitions

March 9, 2017

Agenda

1

Introduction

2

Overview of current workflow in Sierra

3

Using Real-Time Acquisition in Alma

4

Using Import Profiles in Alma

Set-up: RTA Workflow with LSP

■ API Key

- An API key should be generated by you and supplied to YBP:
- Login to the [Developers Network](#) using your institution account.
 - **Make sure you are connected with your institution account and not with your personal account**



■ API Key, Cont.

- Define an application with the name "Integration with YBP-GOBI".
- Add "Acquisition" API to the application, with read/write plan for your ***production*** environment.
- Add "Configuration" API to the application, with read only plan for your ***production*** environment.
 - **Note: YBP does not have a testing environment, hence the API key must be defined for the Alma production environment.**
- Copy the API key of the application. This is the API key that will be used as part of the GOBI API calls in order to identify your institution.

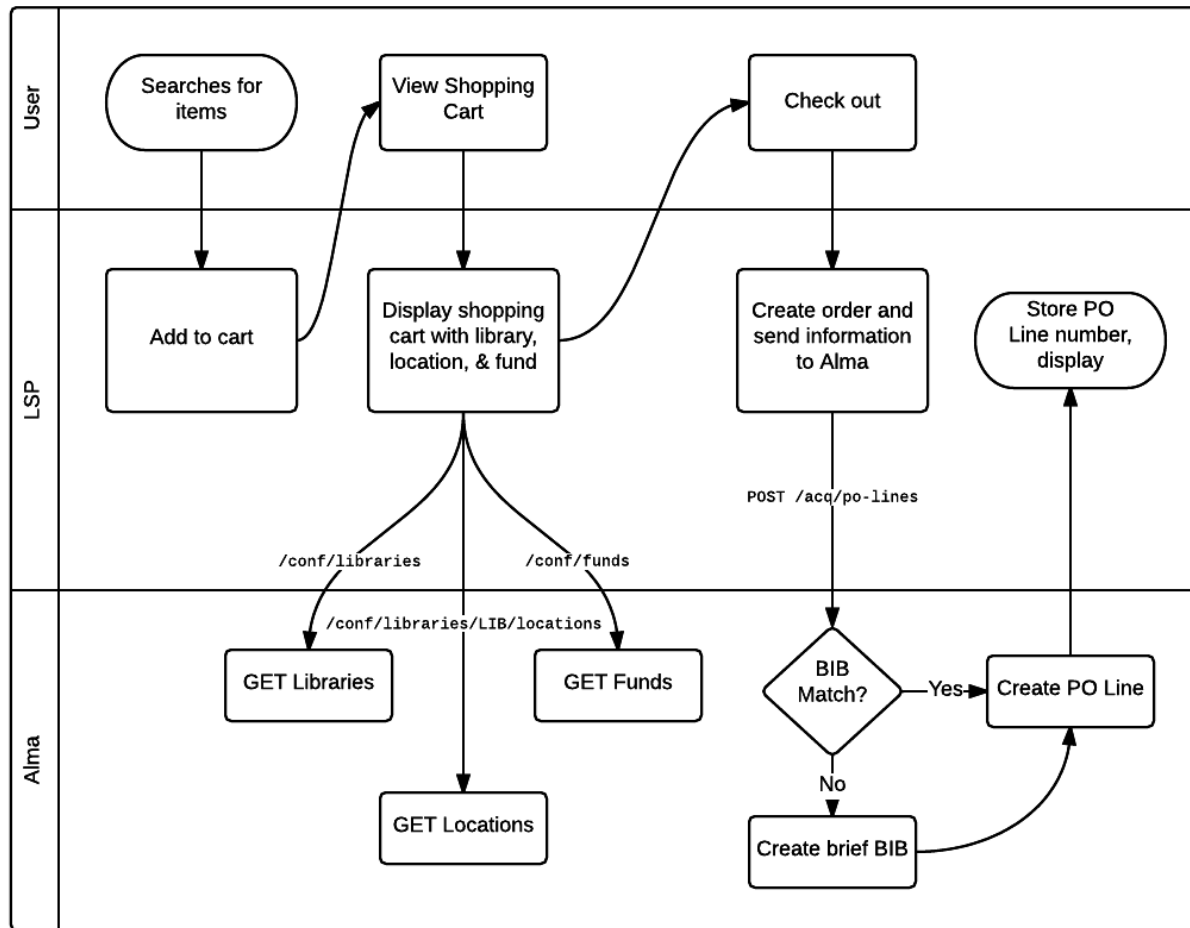
Set-up: RTA Workflow with YBP

- Vendor code and Vendor account code
 - this is the information regarding the vendor record in Alma for YBP
- Owning Library code(s)
 - this is the library for which the created PO line will be assigned to
 - you will need to supply a list of possible library codes to YBP
- Location code(s)
 - this is the location in which the related item(s) will be created
 - relevant only for physical material
- Fund code(s)
 - this is the fund from which the payment will be made

Real-time Acquisition

- An end-to-end real-time acquisitions workflow
 - The user searches for items and places them in the GOBI shopping cart (or equivalent).
 - The user verifies owning library, fund codes and other relevant information.
 - At checkout, GOBI sends the shopping cart data to Alma using the **Create PO line API**.
 - Alma validates the received PO line information (see **PO line object**)
 - Alma attempts to match the records using standard identifiers. If no match is found, Alma creates a brief bibliographic record for the order.
 - Alma responds with the newly created PO line number to GOBI.
 - The PO line is processed in Alma as other PO lines are processed. If an order requires manual review, Alma sends it to the In Review task list.
- The vendor reference number is kept as part of the Alma PO line
- Alma PO line number is kept as part of the GOBI order details

Real Time Acquisitions Integration Alma & Library Service Providers (LSP's)



RTA Configuration in Alma

■ MD Editor template

➤ ensure that a default metadata template is configured

- MD Editor -> template -> choose -> click properties -> check as default

■ Integration with YBP

➤ the vendor account representing YBP should be defined with 0% discount

■ Decide about the matching rules that you want to apply

- [Developer's Network: RTA Overview](#)
- [Developer's Network: RTA Configuration for Libraries](#)
- [Developer's Network: RTA Configuration for Vendors](#)
- [Developer's Network: Working with APIs](#)

YBP Basic Workflow in Alma

- Place orders directly in GOBI and receive EOCRs (Electronic Order Confirmation Record - brief bibs with embedded order data)
- Import brief bibliographic record with embedded order information into Alma
- Update bibliographic record with full version and (optionally) inventory in Alma using import profiles:
 - Records overlay bibliographic records in Alma
 - Item updated with barcode, call number added to holdings
- Load invoice by using EDI

YBP Import Profiles

- Use Import profiles in Alma:
 - YBP Gobi Brief Record (for the EOCRs) – ‘New Order’ profile type
 - YBP Full Records (for the full MARC records) – ‘Repository’ profile type
 - ‘Update Inventory’ import profile type

YBP Import Profiles

- [https://knowledge.exlibrisgroup.com/Alma/Product Documentation/Alma Online Help \(English\)/Resource Management/060Record Import/050Importing Records Using an Import Profile#Use-Case: Overlaying a Brief Record that has an Order](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma%20Online%20Help%20(English)/Resource%20Management/060Record%20Import/050Importing%20Records%20Using%20an%20Import%20Profile#Use-Case:OverlayingaBriefRecordthathasanOrder)
- <https://developers.exlibrisgroup.com/blog/Loading-YBP-Records-into-Alma>

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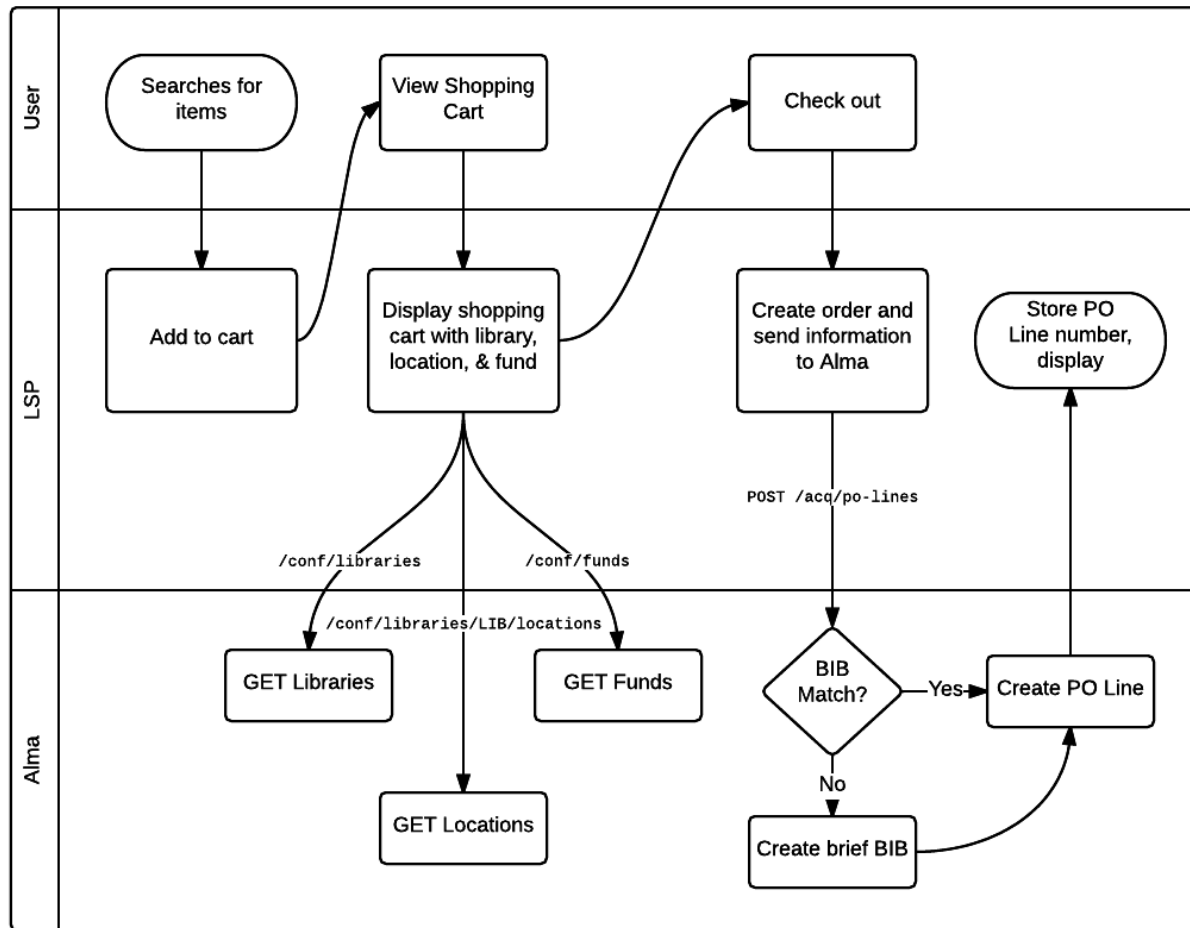
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Using Import Profiles in Alma

Real-time Acquisition

- An end-to-end real-time acquisitions workflow combines an LSP with Alma for product selection and ordering:
 - The user searches for items and places them in the LSP shopping cart (or equivalent).
 - The user verifies owning library, fund codes and other relevant information.
 - At checkout, the LSP sends the shopping cart data to Alma using the **Create PO line API**.
 - Alma validates the received PO line information (see **PO line object**)
 - Alma attempts to match the records using standard identifiers. If no match is found, Alma creates a brief bibliographic record for the order.
 - Alma responds with the newly created PO line number to the LSP.
 - The PO line is processed in Alma as other PO lines are processed. If an order requires manual review, Alma sends it to the In Review task list.
- The vendor reference number is kept as part of the Alma PO line
- Alma PO line number is kept as part of the LSP order details

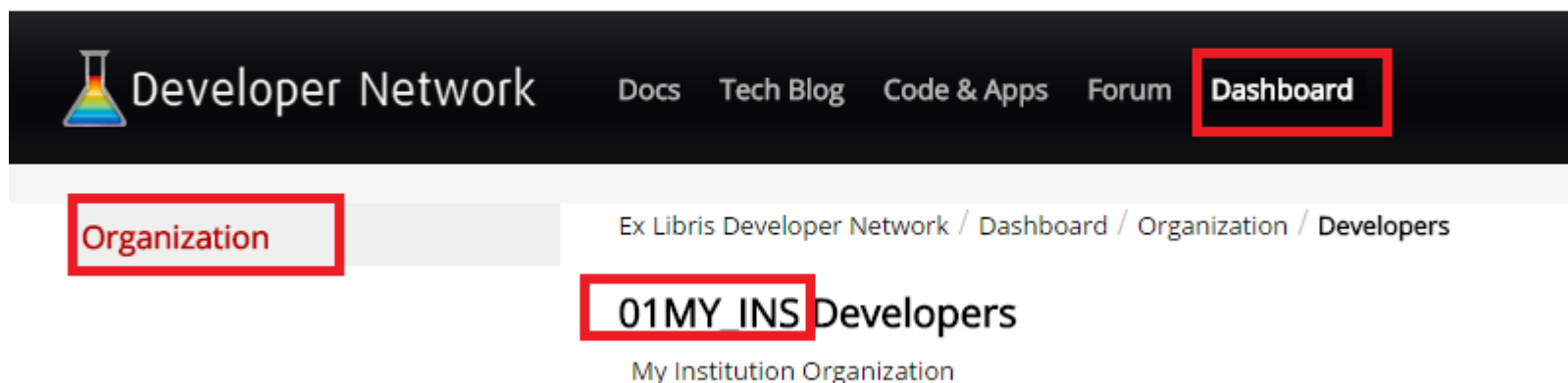
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THANK YOU