

The Rainbow Spectrum of Acquisition Synchronization

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IGeLU 2019

University's Libraries

**The David J. Light Law
Library**

**The Brender-Moss Library
for Social Sciences and
Management**

The Bob Shapell School of Social
Work Library

The Constantiner School of
Education Library

**The Elias Sourasky Central
Library**

The Archaeology Library

The David Azrieli School of
Architecture Library

Etc...

**The Gitter-Smolarz Library
of Life Sciences and
Medicine**

The Library of the Department of
Communication Disorders

**The Neiman Library of
Exact Sciences and
Engineering**

The Geographical Library

Integration need for translation



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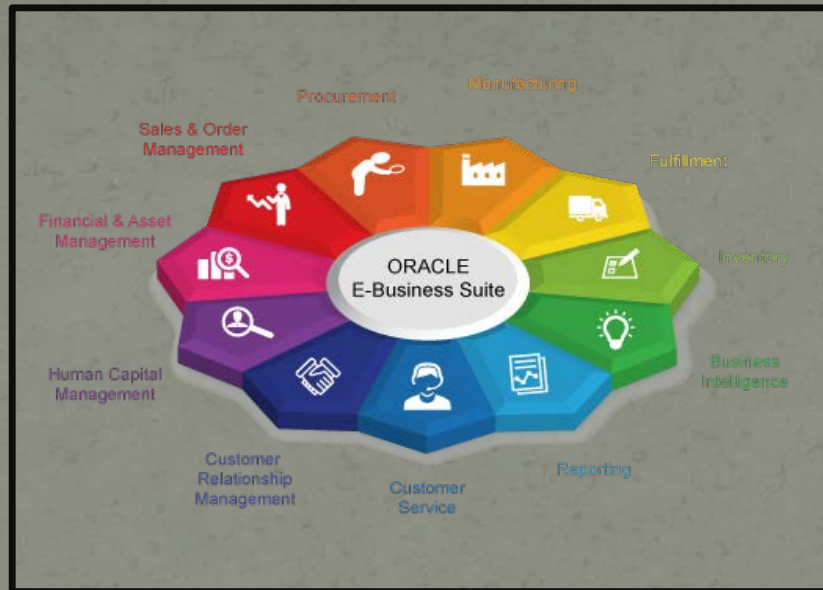


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Initial architecture



Initial architecture – Pros and Cons



- A tried and tested workflow
- Modifications made to the ERP
- A unified acquisition system and methods across the university



- Acquisition workflows are separated from all other libraries' workflows
- Manual duplication of selected data, without any checks
- Essential analytics data missing for libraries management
- No communication capabilities, with vendors and with orders initiators

Set of goals

- Tracking ordering and receiving of items
- Incorporating acquisition into library workflows
- Managing items received as gifts
- Communicating with the order initiator
- Statistics, reports and dashboards
- Analytics that will help us gain knowledge and improve our decisions' taking.

Field Survey

- Mapping libraries' current workflows
- Understanding the ERP technical capabilities
- Training conducted by Ex-Libris
- Studying the APIs and finance integration
- Talking to other Universities

Reviewing proposed methods

Feasibility study

- Technically feasible
- Available resources
- Meet our goals

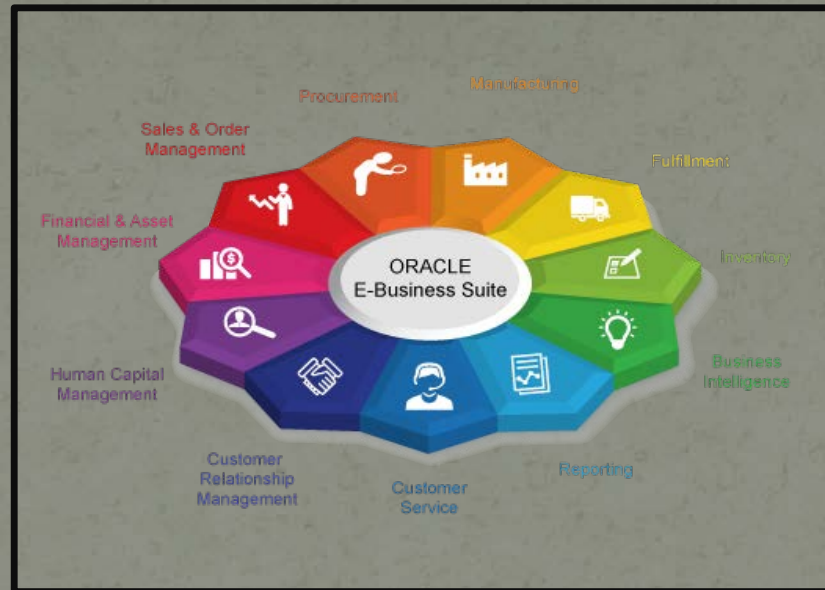
Proof of concept

- Small scale demonstration
- Include actual examples

Pilot

- Testing of the complete solution
- Checking of particular scenarios and edge points

Option 1 – ALMA fully updated using APIs



All data entities



Option 1 - Pros and Cons

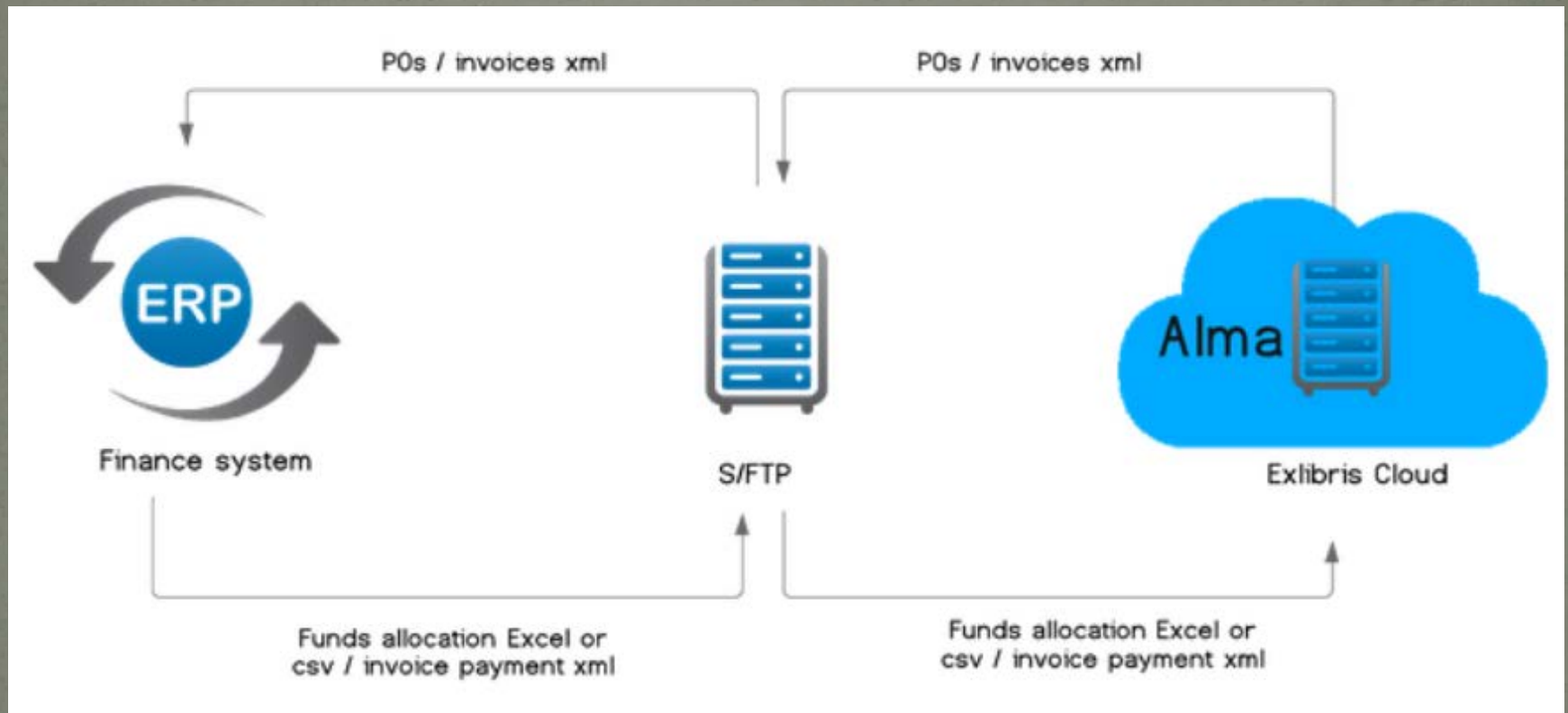


- Using the tried and tested workflow
- A unified acquisition system and methods across the university



- Ex-Libris did not approve
- Risks of data integrity issues
- A great amount of programming

Option 2 - Using ALMA's Finance integration



Option 2 - Pros and Cons

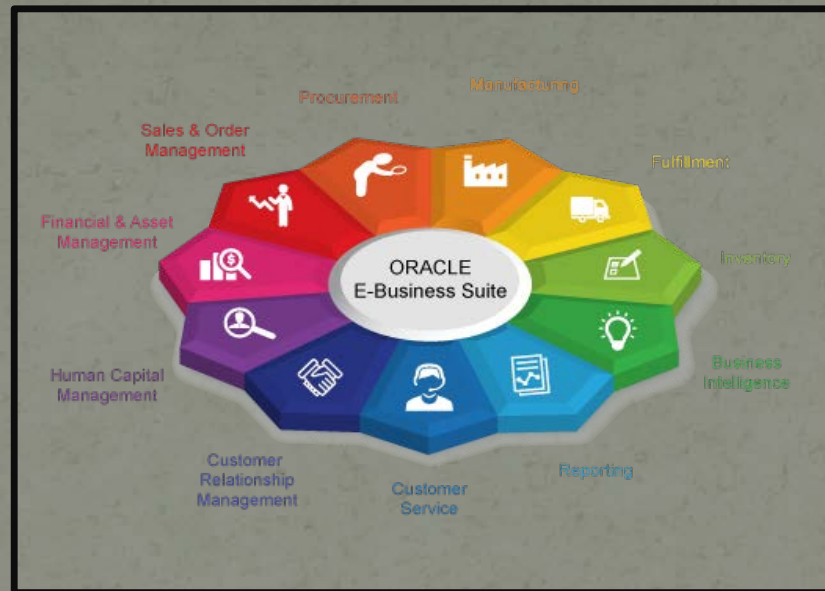


- Fully supported by Ex-Libris
- All libraries' staff working in a single system



- Chain of approvals for each order
- Separate each order to several vendors
- Separate invoices according to funds
- Working in two systems for purchasing of non-library materials

Option 3 – ALMA partially updated using APIs and files



Option 3 – ETL responsibilities

- Extract data from the ERP – IT division
- Transform the data – A two step process, partly managed by the IT and partly by the libraries
- Load the data to the ERP - Libraries

Data Mapping - During Export

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 הזמנה, מהדורה: 7023778
 ספק: זימור לשכת שירות למיקרופילם בע"מ
 יעד למשלוח: 029 ספריית הנדסה ומדעים מדוייקים
 קונה: בריינין, סבטלנה
 תיאור: הספר נרכש מתקציה של פרופ' סטיבן שוחט

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 יעד לחיוב: 029 ספריית הנדסה ומדעים מדוייקים
 סטטוס: מאושר, משוריין

איש קשר: שריג, אבי
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צורה | ניקוי | ביטול | ציישור

Data Mapping – Before Import

```
! 1 = ERP Library code  
! 2 = ALMA Library code  
! 3 = Library description  
!
```

```
!1 2 3  
###-###-#####
```

```
029 AS1 Exact Sciences  
049 AC1
```

```
! 1 = ERP Main category  
! 2 = ERP Sub-Category  
! 3 = ALMA PO Line Type Code  
! 4 = ALMA PO Line Type Description  
!
```

```
!1 2  
###-###-#####-#####
```

```
301 310 PRINTED_BOOK_OT Print Book - One Time
```

```
001 011 *****001 011
```

Option 3 – Proof of concept

- No budgets (funds) synchronization. Only “Technical” or “Gift” purchase types. Prices ARE synchronized
- Every vendor that existed in ALMA must have an ERP number
- Every relevant order in the ERP must have an MMS ID
- Every relevant order in the ERP can have an initiator ID

Option 3 - Pros and Cons

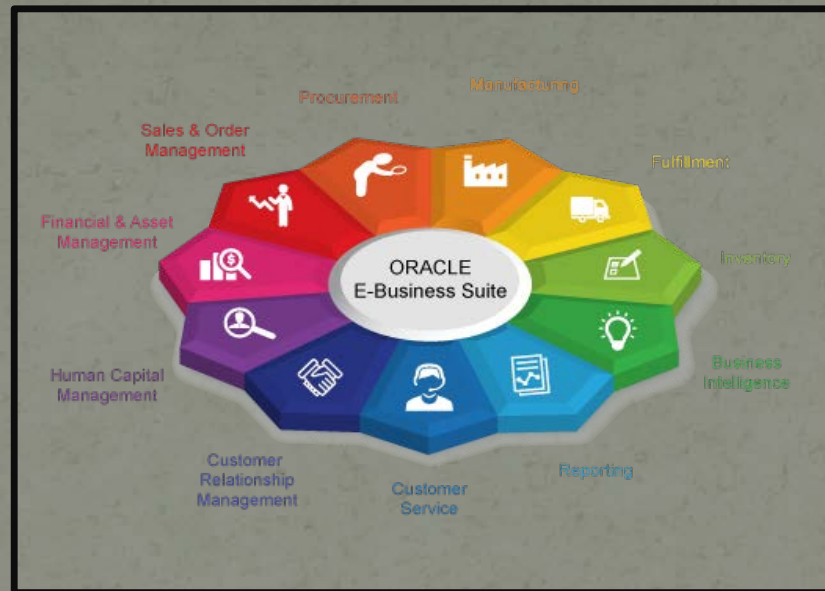


- Communicating with the vendors and the order's initiators via ALMA
- Reports and analytics in ALMA



- Receiving of the items in ALMA (Too much duplicate work)
- The invoice synchronization cycle (Data integrity issues. Bad previous experience)

Option 4 – ALMA partially updated using APIs



Option 4 – Pilot

- Working in the sandbox environment
- Quick cataloguing for new bibliographic records
- Synchronize the receiving of items from the ERP
- Invoices are handled in the ERP only

Human Resources

- IT – Tamar Gold, Ron Segal, Moshe Solomon
- Libraries - Heads of all acquisition departments in all libraries, along with our University's 5 system librarians and the libraries directors as observers.
 - Policy issue
 - Data mapping
 - Integrating workflows

Time table

- We aim to go live with the synchronization at the beginning of this academic year (27th of October)
- Adjustments and additions during the academic year



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