



University of  
South Australia

Library

# Real Time Acquisitions: Alma and the Gobi API

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ANZREG Seminar 2015



# Service Overview



Order

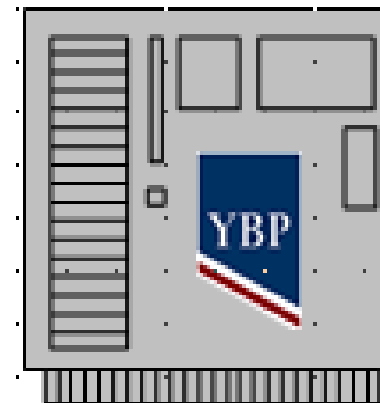
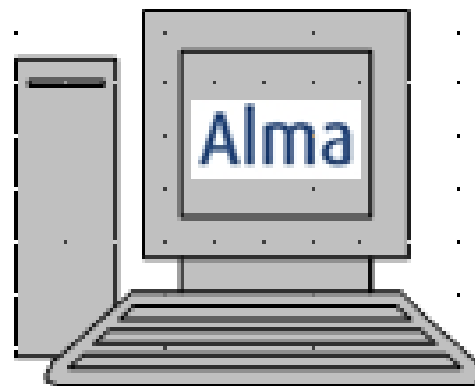
GobiSmart



Duplication  
Control

API

Order Held



Order  
Released

Alma POL

# Workflow

1. Library orders on GOBI (single or multiple orders)
  2. GOBI sends brief bib and order data to Alma
  3. Alma tries to match incoming data to existing Alma bib via ISBN
    - a. If match, order created on existing bib record
    - b. If no match, brief bib and order created
    - c. If library has Network Zone, will try to match to Network Zone record first
    - d. Does not match to Community Zone eBook records
  4. Once order is created, Alma POL is assigned
  5. POL returned to YBP and loaded to GOBI open order
  6. POL available for output to cataloging record and paper/EDI invoice
- Real-time process, usually only takes a few seconds
  - This changes the process for point of order, but not point of shipment/invoicing (still MARC/EDI files, FTP, loading)

# Order screen in GOBI (customised)

## Order Details

1 item. ✕

**Title:** HISTORY OF THE UNIVERSITY OF CAMBRIDGE; V. III: 1750-1870.  
**Author:** SEARBY, PETER  
**Publish Year:** 1997    **ISBN:** 9780511582202

Please Choose Template:  or enter order details below.

Subaccount\*

PO Number

Fund Code\*

↑Choose or Type↓

Library\*

Notes to vendor

eBook Local Notes

Print Local Notes

Collection\*

Reporting Code\*

No Substitutions

Initials\*

Quantity

eBook Purchase Option\*

List Action

- Retain Marked Status on Items in List  
 Remove Marked Status on Items in List

Cancel ✕ Clear Order Details Save Order

# GOBI Order Details

Title: ROUTLEDGE HANDBOOK OF TOURISM AND HOSPITALITY EDUCATION

Author:

ISBN: 9781135018955

Pub Year: 2015

Binding: eBook

Series Title: [ROUTLEDGE HANDBOOKS.](#)

Publisher: ROUTLEDGE

Series ID: 512735

Series Type: Unnumbered Series

Action	Date	Qty	Descriptor	Subaccount	Fund/ Other	PO#	Initials	Submitted By	Invoice#
<a href="#">Order</a>	2/4/2015	1	US EBOOK ORDER/SLIP	1133-41	MGN	POL-22020/NR	GS	GS	

[- close -](#)

Non-returnable/non-cancelable alert overridden.  
Customer provided comments with the order.

YBP Order Key: 99961634991

Notes to vendor: EBLNL

Library: IRT

eBook Local Notes: Chapters authored by UniSA staff Dr M J Gross

Print Local Notes:

Collection: TSBOO

Reporting Code: EB

Supplier: EBL

Purchase option: Non-Linear Lending™

Title: CAREER MANAGEMENT.

Author: GREENHAUS, JEFFREY H

ISBN: 9781412978262

Pub Year: 2010

Binding: Paper

Action	Date	Qty	Descriptor	Subaccount	Fund/ Other	PO#	Initials	Submitted By	Invoice#
<a href="#">Order</a>	2/2/2015	1	US BYPASS	1133-19	ACI	POL-21979/ID	GS	GS	

[- close -](#)

Duplication alert overridden.

YBP Order Key: 99961613201

Notes to vendor:

Library: MG

eBook Local Notes:

Print Local Notes: Add copy Rec Read PERF 3006 EAS BPR Daniela Kaleva

Collection: MGMAIN

Reporting Code: BK

Supplier: SAGE PUBNS., INC.

Purchase option:

Shipped 9/25/2010 1 US FIRM 1133-10 MGN 93750

[Order](#) 9/11/2010 1 US FIRM 1133-10 MGN MX MX

[- close -](#)

YBP Order Key: 99939004182

Notes to vendor:

Library: CW

eBook Local Notes:

Print Local Notes: PREV ED BIB #222713 - Karen Ayles

Collection:

Reporting Code:

Supplier: SAGE PUBNS., INC.

Purchase option:

Selected 9/10/2010 1 MGN I S I



# Alma Bibs

<b>Title</b>	ORGANIC CHEMISTRY.	<b>Originating system</b>	
<b>MMS ID</b>	9915902306401831	<b>Export to WorldCat</b>	
<b>Suppress from publishing</b>	No		
<b>Export to Libraries Australia</b>	Don't publish		
<b>LDR</b>	naa a22 i 4500		
<b>001</b>	9915902306401831		
<b>020</b>	__  a 9781118452288		
<b>100</b>	__  a KLEIN, DAVID R., 1972-		
<b>245</b>	__  a ORGANIC CHEMISTRY.		
<b>260</b>	__  a HOBOKEN  b JOHN WILEY  c 2015		

<b>Title</b>	General chemistry : the essential concepts /	<b>Originating system</b>	61USOUTH AUS_INST	<b>Originating system ID</b>	0
<b>MMS ID</b>	9915897006901831	<b>Export to WorldCat</b>	Publish Bibliographic records	<b>Brief record</b>	No
<b>Suppress from publishing</b>	No				
<b>Export to Libraries Australia</b>	Publish Bibliographic records				
<b>LDR</b>	01132cam a2200325 i 4500				
<b>001</b>	9915897006901831				
<b>005</b>	20150128120438.0				
<b>008</b>	120601t20142014iaua 001 0 eng				
<b>010</b>	__  a ^2012018233				
<b>016</b>	7_  a 016198921  2 Uk				
<b>020</b>	__  a 9780073402758  q hardback : alk. paper				
<b>020</b>	__  a 0073402753  q hardback : alk. paper				
<b>035</b>	__  a (OCoLC)794640253				
<b>040</b>	__  a DLC  b eng  e rda  c DLC  d IG#  d UKMGB  d YDXCP  d OCLCF  d PUL  d OCLCO  d CDX  d SUSA				
<b>042</b>	__  a pcc				
<b>050</b>	00  a QD33.2  b .C48 2014				
<b>082</b>	00  a 540  2 23				
<b>100</b>	1_  a Chang, Raymond,  e author.				
<b>245</b>	10  a General chemistry :  b the essential concepts /  c Raymond Chang, Williams College, Kenneth A. Goldsby, Florida State University.				
<b>250</b>	__  a Seventh Edition.				
<b>264</b>	1  a New York :  b McGraw-Hill,  c [2014]				

# Set up work: Library

## YBP-Ex Libris GOBI-Alma API Setup Information

**Date:** 29-Oct-2014  
**Library:** Univ of South Australia  
**Base account:** 1133  
**API Key:** I7xxaf4253e02bbe430dbbe9503207339828

			Alma Data		
Subaccount	Subaccount description	US or UK	PO line owner (code)	Vendor code	Account code
1133-10	Firm Orders	US	IRT/ADMIN/ILL	YBP	1133-10
1133-13	Dust Jacket Orders	US	IRT/ADMIN/ILL	YBP	1133-13
1133-14	Rush Orders	US	IRT/ADMIN/ILL	YBP	1133-14
1133-19	Bypass Orders	US	IRT/ADMIN/ILL	YBP	1133-19
1133-40	eBook Packages	US	IRT/ADMIN/ILL	YBP	1133-40
1133-41	eBook Orders	US	IRT/ADMIN/ILL	YBP	1133-41
1133-60	Firm Orders	UK	IRT/ADMIN/ILL	YBPUK	1133-60
1133-63	Dust Jacket Orders	UK	IRT/ADMIN/ILL	YBPUK	1133-63
1133-66	Priority Orders	UK	IRT/ADMIN/ILL	YBPUK	1133-66
1133-76	Bypass Orders				

## Alma API: Local Data Mapping from GOBI to API

**Date:** 29-Oct-2014    **Base Acct:** 1133  
**Requested by:** Ann-Marie    **Library:** Univ of South Australia

GOBI Field	Displayed?	GobiSmart Label	Alma API Field	Notes
Location	Yes	Library	Library	
Local Data 1	Yes	Vendor Code	Do Not Output	[can be removed from GOBI screen, since it will be defaulted in the API setup data]
Local Data 2	Yes	Local Notes	Receiving Note	
Local Data 3	Yes	Collection	Shelving Location	
Local Data 4	Yes	Reporting Code	Reporting Code	
Subaccount	Yes	Subaccount	Notes (repeatable)	
Purchase Option	Yes	Purchase Option	Notes (repeatable)	

Please use our existing location and library codes as specified in GobiSmart  
 Please use our existing fund codes and reporting codes as specified in GobiSmart



# Set up work: YBP



## YBP Setup: API Data Mappings

INCA Subscription Services GOBI Library GOBI Admin Query FEU Reports DDA ILS  
Profiles Fund Code Mappings

**Manage ILS Profiles for 1950 - UNIV OF MINNESOTA/MINNEAPOLIS**  
All activated subaccounts must have all fields filled out

**GobiSmart Mappings**

GobiSmart Field	GobiSmart Custom Label	ILS Field
PO Number	P.O. Number	- None -
Fund Code	Fund code	Fund Code
Initials	Initials	Notes (multiples allowed)
Order Notes 1	Instructions to YBP	Vendor Note
Local Data 1	Library	Library
Local Data 2	Location	Shelving Location
Local Data 3	Internal Order Note	Receiving Note
Subaccount	Subaccount	Notes (multiples allowed)
Purchase Option	Purchase Option	Notes (multiples allowed)

# From Alma Developers

## Real-time Acquisitions: Alma - YBP integration

Tamar Fuches

CODE & APPS

ALMA

Real-time acquisitions is an integration between ExLibris Alma and Academic Library Service Providers (LSPs), to streamline acquisitions workflows. It incorporates standard ordering and loading technologies with APIs to speed the availability of resources, increase the efficiency of integrating records, and enhance data enrichment.

### Workflow

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

The following vendors currently support this integration:

- [YBP Library Services](#)

For setting up a real-time acquisitions workflow with YBP please contact YBP Sales or Customer Service Rep.

### Activating the integration

Following is the information you will need to supply to the LSP:

1. **API key**

An API key should be generated by you and supply to the LSP:

- Login to the [Developers Network](#) using your institution account. Make sure you are connected with your institution account and not with your personal account: Go to Dashboard - Organization. Your institution code should be displayed:



Developer Network

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

# Limitations

- Brief bib data only; not a good replacement for EOCR Plus
- Matching is ISBN only; does not distinguish P and E
- If matches to multiple Alma records, picks random record
- \$0 Price: order goes to review for library to resolve; also causes Alma to drop the fund code
- Multi-copy eBook orders not supported
- eBook orders do not match to Community Zone eBook records;

# Future Enhancements

- Distinguish P and E for matching purposes
- **Handling/Matching on other control numbers (e.g. OCLC number, YBP UID)**
- Populating the eBook Group Setting properly
- Allow for manual selection by library (or rules-based selection perhaps) when multiple possible matches
- **Real-time duplication check against Alma when ordering in GOBI; display possible duplicates in GOBI**
- Alma price/availability lookup in GOBI

# Questions?

Acknowledgements: Ann-Marie Breaux  
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