The Rainbow Spectrum of Acquisition Synchronization

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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
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
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

POL, Vendors and Paid Invoices

Invoices

Ex Libris Knowledge Center
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
Data Mapping – Before Import

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

1 2 3

029 AS 1 Exact Sciences

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
301 311 ONLINE_RESOURCE One-Time
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 (27\(^{th}\) of October)
- Adjustments and additions during the academic year
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