1. I understand that we have to have the claim cycle tab in the Millenium vendor record coded in order to get the claim intervals automatically updated in Alma. How do we do this for Ebsco titles when we have one vendor record for say 30 titles?

RESPONSE: Clarification requested. Migration question?

1. How to export the following data into an excel spreadsheet?

• Our local order record number (same ALMA POline#)

• Title

• Internal notes (covering contextual information to support decisions: e.g. queries/decisions regarding renewal, retention, online access availability, what is included with subscription, etc.)

• Order notes, e.g. donor info for gifts, pertinent order history, e.g. format changes, vendor transfers, cross references to related orders, etc.

• Acquisition type, e.g. Purchase, Gift, Accompanying item, etc.

• Location, i.e. where the material goes after processing

• Annual cost

• Format, e.g. E-journal, Print periodical, Print + Online, CD-Rom, Microfiche, Microfilm, Newspaper, etc.

• Fund code subscription is paid from

• Receipt location (this relates to a specific account)

• Billing location (this relates to a specific account)

• Status, e.g. Active, Cancelled, etc.

• Local subject assignment (currently in our "Requestor field in III, but I'm pretty sure this will need to be enveloped into our fund code)

• Selector.i.e. who originally requested the subscription

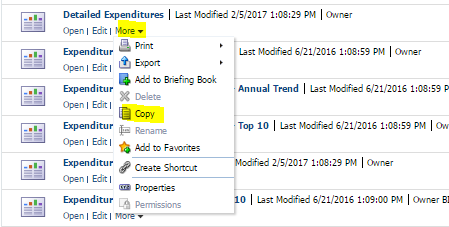
• Vendor

• Vendor order number (i.e. vendor reference ID in Alma)

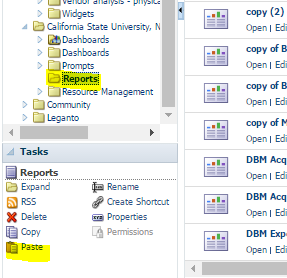
RESPONSE: Alma Analytics>Catalog>Shared Folders>Alma>Acquisitions>Reports

To copy an out-of-the-box report:

1. Click on More>Copy



1. Navigate to the Folder where you wish to copy the report. For example: Shared Folders>California State University, Northbridge>Reports>>Paste



1. We have print serial titles where we have limited retention of the issues for specific titles.

Once a check-in pattern has been created for the paper edition of a title with limited retention, can ALMA inform us of which issues need to be discarded so we do not keep more than one year's worth of issues in the collection? Can be a part of the prediction pattern set-up, similar to the binding module, where the system (should) tell you which volumes are ready to be sent to the bindery? (e.g. a note or email message generated to someone saying that "Volume 9, issues 1-12 of title X are ready to be sent to the bindery."?

RESPONSE: Recommendation is to add receiving note to last item in prediction pattern to alert staff that “this is the last copy in the run” etc. No auto alert.

1. When serials are shelved by title and have no call numbers, binding titles occasionally are different from the 245 title. Where should the field for "Shelved as: JAMA" instead of "Journal of the American Medical Association." and can that shelving title be indexed even though it would be a local field, and not in the original OCLC record? In Sierra, we would add a 246 (title added entry) with a blank second indicator, and add "$i SHELVED AS: $a JAMA" to the 246 title. The $i subfield is not indexed and displays as a note in front of the $a subfield which is indexed as a title.

RESPONSE: This info is in the holdings record in Alma. Call number information from the bib would need to be mapped. Please open a Salesforce Case. Provide examples of how this information migrated during the test load and how you expected it to migrate.

1. Would Ex Libris discuss standing order workflows for serial package purchases? Example, a vendor sells a package of titles under the name NSTA (National Science Teachers Association) membership. This membership title itself would not receive inventory, but the inventory is associated with the 5 different titles that come as part of the membership package: Journal of College Science Teaching, Science Scope, Science Teacher, Science and Children, and NSTA Reports.

Does Ex Libris still recommend using a Standing order POL type – for print, like Physical –Standing order non monograph? Should technicals be created to receive on the workbench, or is the intent in this order type that receiving happens outside the workbench?

RESPONSE: Yes, Standing Order is recommended. Not necessary to create Technical POLs.