**CSU ULMS Summer Meeting  
ACQ ERM Task Force Agenda  
August 2018**

The ACQ ERM Task Force will discuss or present the following topics at its two sessions on Tuesday, August 14th, 2018 in Long Beach, CA.

**Tips & Tricks**

* **Survey ACQ question**: *We have a lot of questions as far as e-book ordering and activations for local subscriptions. Not sure if that is allowed to ask, but doesn't hurt to try. We also would like a demo (again) of Opt-in ordering. I guess a quick demo of all common ordering tasks from order stage to activate stage would be nice!*
* **Survey ACQ question**: *At one of the CSU meetings in the past, there was a presentation on how to set up "new" SDLC orders once Jessica did the set up in the NZ. Demo / discussion about how to set up new orders for different publisher direct orders. For instance, when a selector decides to set up a new journal title, are we looking in the NZ first? Another example would be for a new database. Are we going to the CZ first and activating? Another scenario would be - In what instances do you just order from the IZ if a record already exists in the IZ?*
* **Survey ERM question**: *I activated Ebscohost e-journals collection. Then deactivated it and then activated only those titles we should have.* *The problem is now I have a ton of deactivated titles cluttering my IZ. How do I clean this up?*
* **General Alma tips:** Kirstie and Christine (along with any other volunteers we get during the course of the session), will share various tips with the group that make their day-to-day jobs a little easier. Anything from specific Alma features to workflows to new policies (as they relate to Acq/ERM) are open for sharing and for discussion.
  + **Other non-Alma stuff (if we have any volunteers):** Tips and tricks for things like KBART files, OCLC Collection Manager, Excel functions, etc.

**Acq/ERM working group meeting**

* **Best Practices / Recommendations for Sales Force cases (IZ and NZ).**
  + When to report a problem to ExLibris vs. using the NZ E-resources problem report form.
  + Reporting JSTOR DDA issues to Marcus Jun.
* **New Functionality and Features Talk**
  + *“ProQuest ebook central Integration Profile and Electronic Holdings AutoLoad"*
  + *"Combining Institution and Network Zone Search Results"*
  + *Safari platform change?*
* **Additional potential topics for discussion:** 
  + What would people like to see from the Acq/ERM working group this year? More training? Tackling bigger issues (like improving CZ metadata)? Etc…
  + How have libraries handled changes in job duties or department re-organizations (if any) because of migrating to Alma? What seems to work? What doesn’t?
  + Acq or ERM cleanup projects – what are you doing/have you already done?
  + How do your librarians monitor their fund balances?
    - Do you have a good analytics report/widget they actually use?
    - Has anyone tried the funds monitor in the Alma Tech Services toolbox? I did and I thought it could be useful, but it was a bit clunky.
  + Staff training
    - Have you had any new acq/ERM staff come onboard after implementation? What were the best training resources you used? Any problems you ran into?