Real-Time Acquisition (RTA) integration with OASIS platform

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Introduction

Creating a new order via OASIS

The order gets created in Alma

View previous orders in OASIS
Introduction

• This presentation will show the workflow for Alma Real-Time Acquisition (RTA) integration with the OASIS platform.
• As part of this workflow an order is created by the user in the OASIS platform and in real time also created in Alma.
• Bibliographic as well as acquisition information such as the fund, price, and library information is taken from OASIS and used to create the record in Alma.
Introduction

• The advantage of using the Real Time Ordering in this manner is to achieve a faster and more efficient workflow

1. A faster process: The order is created automatically in Alma this there is no need for double entering of data. This ensures data integrity preventing possible human errors in the double entering of data.

2. A streamlined process: Because the actions are done behind the scenes via an API there is no need to set up import profiles and use MARC EOD files and an ftp server.
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- Login to the OASIS Platform
Creating a new order via OASIS

- In the “Search All Titles” tab search for what you want to order

[Image of OASIS interface with search bar and ISBN/EAN highlighted]
Creating a new order via OASIS

• Note that we are ordering ISBN 9781556521041 and it does not yet exist in Alma

This is Alma and we see that ISBN 9781556521041 is not (currently) in the Alma repository
Creating a new order via OASIS

- From results in OASIS click “Action > Order Info”
Creating a new order via OASIS

• Choose Library, Fund and Quantity

If desired save this information as a template for the future
Creating a new order via OASIS

• Mark the record for ordering
Creating a new order via OASIS

• Note the link for “Order Info”
Creating a new order via OASIS

- Repeat for however many records you would like to order, then click “Process List > Checkout orders > Create Firm Orders > Process”
Agenda

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The order gets created in Alma

- Now we will see the bibliographic record and order which was created in Alma from OASIS

Previously a search in Alma on this ISBN gave no results

This is the record we ordered in Alma just a moment ago
The order gets created in Alma

- Here is the order in Alma

<table>
<thead>
<tr>
<th>Select PO Line (1 - 1 of 1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 1 of 1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>MMS ID:</td>
<td>99156810600121</td>
</tr>
<tr>
<td>Assigned to:</td>
<td>-</td>
</tr>
<tr>
<td>Type:</td>
<td>Print Book - One Time</td>
</tr>
<tr>
<td>PO line owner:</td>
<td>Main Library</td>
</tr>
<tr>
<td>Standard number:</td>
<td>9781556521041</td>
</tr>
<tr>
<td>Order/Line:</td>
<td>POL-45698</td>
</tr>
<tr>
<td>Copies:</td>
<td>Main Library - General (1)</td>
</tr>
<tr>
<td>Total price:</td>
<td>13.90 USD</td>
</tr>
<tr>
<td>Funds:</td>
<td>Library and Information Science (100.0%) (01/01/2017 - 12/31/2017)</td>
</tr>
<tr>
<td>Vendor/Account:</td>
<td>Coutts / Coutts-Main 01-COU</td>
</tr>
<tr>
<td>Vendor reference ID:</td>
<td>10UISPO6</td>
</tr>
<tr>
<td>Expected delivery:</td>
<td>-</td>
</tr>
<tr>
<td>Receiving note:</td>
<td>-</td>
</tr>
</tbody>
</table>

- Price information from OASIS
- Library and fund is what we entered in OASIS
The order gets created in Alma

- Note that the OASIS control number will be added to the Alma order in the “Vendor Title Number” field
The order gets created in Alma

- Note that the bibliographic record created in Alma has an originating system “NEW_ORDER_API”
The order gets created in Alma

- In this manner it is possible to retrieve all records created from the OASIS system with additional parameters such as creation date.
Agenda

- Introduction
- Creating a new order via OASIS
- The order gets created in Alma
- View previous orders in OASIS
View previous orders in OASIS

- If desired you can view your previous orders

This is the ISBN we previously ordered
View previous orders in OASIS

• From results view the order information

Purchase order number in Alma
View previous orders in OASIS

• POL Number from Alma is in the OASIS record
Thank You