

# CUSTOMER ALMA API SETUP WORKSHEET

## INSTRUCTIONS

GobiAPI for Alma is a real time acquisitions tool. The Library places an order in Gobi and upon submitting the order, the API adds the order to the Library's Alma system. This creates a brief Bib record as well as the PO/POL then returns the POL to Gobi to attach the POL to the item in the order.

### RESPONSIBILITIES

- **Library** will update Alma with basic information.
  - If using Fund Codes in Approval Plans, Library needs to also alert GOBI Customer Service to any changes.
  - If applicable, Library must complete Ledger and Fund code updates in Alma prior to setting up GobiAPI for Alma.\*
- **ASM LTS** (GOBI's Account Services Manager for Library Technical Services) will work with the Library to complete the Alma API Setup Worksheet then submit for implementation.
- **LTS** (GOBI's Library Technical Services) team will:
  - Update the Library's Tech Specs.
  - Send to Library for review.
  - Implement once the Library responses to email with approval.
- **Library** will "test" GobiAPI by submitting one to five orders after implementation.
  - Orders are live, real orders and will be fulfilled and billed.
  - GobiAPI cannot be tested in the Alma sandbox but must be the live instance.

*\*If your library does not use a fund ledger in Alma, the API can still be used. Consult with the ASM LTS on the Alma settings that are required.*

### WORKSHEET – SETUP BASICS TAB

- **ASM LTS** lists the subaccounts, noting
  - Firm Orders subaccounts only.
- **Library** completes cells highlighted in light blue on the worksheet:
  - API key: Librarian will go to <https://developers.exlibrisgroup.com/manage/keys/>
    - Requires login by Library (check with Alma if you do not have access).
    - Ensure the API allows for Acquisitions for Read/Write permission.
  - Alma Data: Librarian will look in Alma for this detail. Images and detail below on how to discover this in Alma.
    - PO Line owner (code)
    - Vendor code
    - Account code
  - If the Library does not wish GobiAPI on a subaccount, Library should delete the row from the worksheet.

### WORKSHEET – GOBISmart- API MAPPING TAB

- **Library** should review current GobiSmart settings before working on this section.
  - Settings viewable in
    - Gobi > Order Details
    - Gobi > Library > Administration > GobiSmart
  - Brief video demonstration of GobiSmart :  
<https://www.youtube.com/watch?v=TX7FeySMEe0>

- **ASM LTS** will input the details for the following, based on the library's GobiSmart then provide to the library along with these instructions.
  - *GOBI Field* is what GOBI calls the field internally.
  - *Displayed* indicates if the field is displayed in the Library's Gobi > Order Details (GobiSmart).
  - *GobiSmart Label* is what the Library has determined to name the field in the Library's Gobi > Order Details (GobiSmart).
  - *Required?* Denotes if the field is required by the Library for the Selectors and Orderers
    - Select – yes or no
    - Order – yes or no
    - Validation – yes (library has dropdown menu to select) or no (free text field)
    - Max – indicates the maximum number of characters allowed in the field
  - *Alma API Field* – indicates where the information input in the Library's Gobi > Order Details (GobiSmart) will be transmitted to within the Library's Alma instance via the API.
  - *Notes* – these are internal notes explaining any changes or other necessary details.
- **Library** completes cells highlighted in light blue on the worksheet, often working on during a meeting with the ASM LTS
  - *Displayed* – Library selects if the field should be displayed in the Library's Gobi > Order Details (GobiSmart).
  - *GobiSmart Label* – the Library decides what to call each GOBI Field when it displays in the Library's Gobi > Order Details (GobiSmart).
    - *Local Data 1-4* fields are open to Library use for their needs. Some Libraries may wish to add Reporting codes, etc. The Library can label these as desired in the GobiSmart Label column.
  - *Required?* Library determines if the field is a required field for the Selectors and/or Orderers and if a validation list exists
    - Select – yes or no
    - Order – yes or no
    - Validation – yes (add list to tab Validation Lists) or no (free text field)
  - *Alma API Field* – using the dropdown menu, the Library selects where the data will transfer into the Alma field selected
    - GOBI fields "PO Number, Subaccount, and Purchase Option" should not be changed.
  - *Notes* – Library can input a note to Gobi on changes desired for that Gobi Field. This is optional.
  - If the Library decides to utilize validation lists or wishes to change them, then add or edit them on the Validation Lists tab.

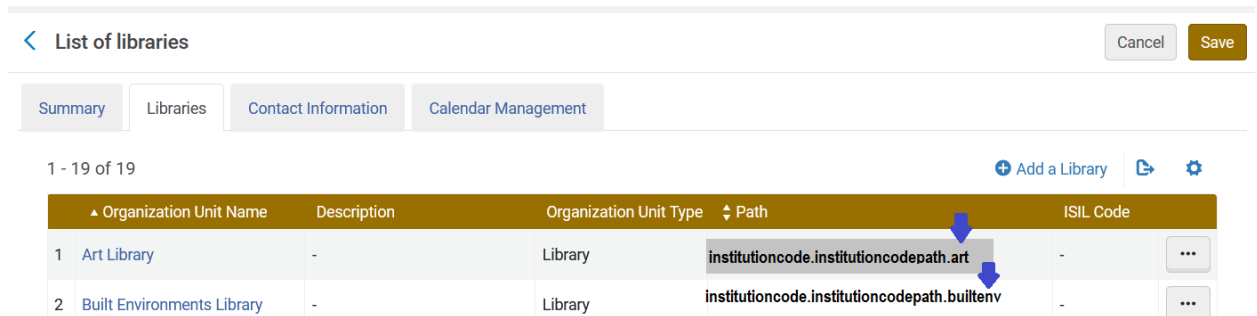
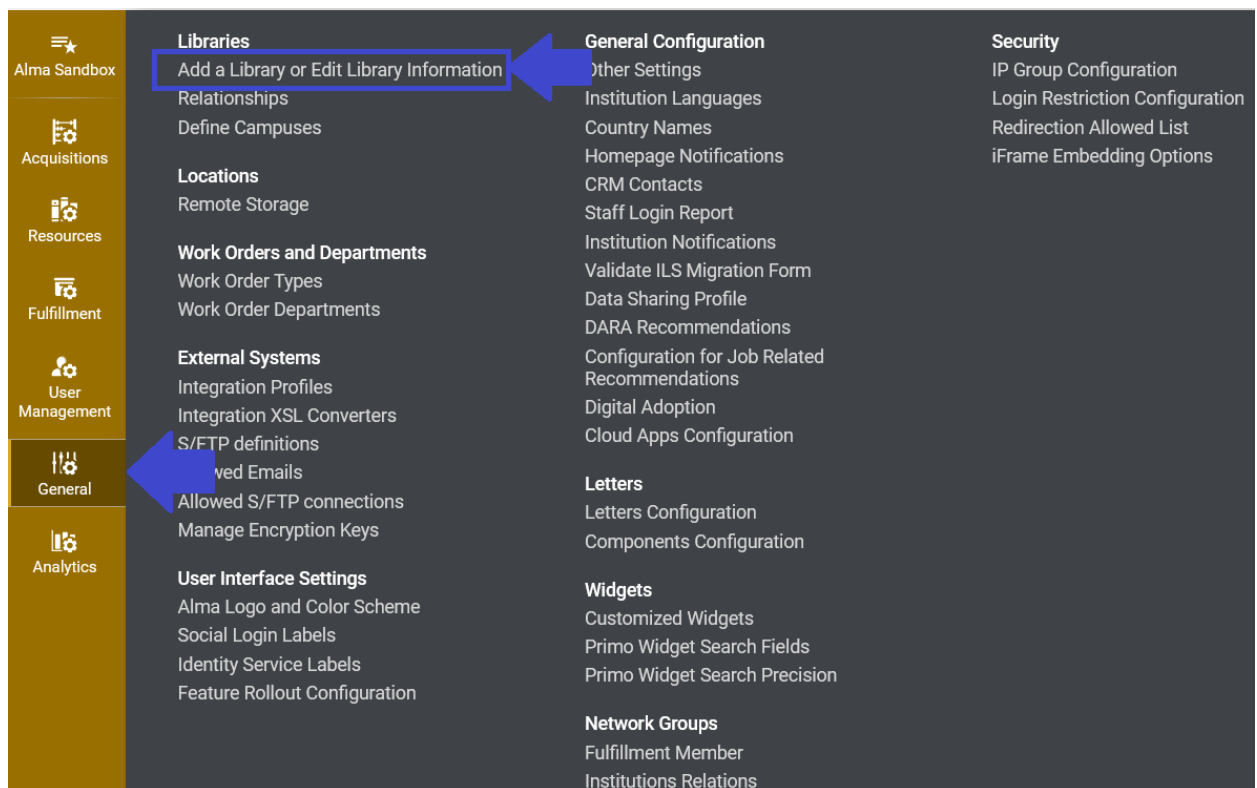
## WORKSHEET – VALIDATION LISTS TAB

- **ASM LTS** will list any current validations lists the library has in their Gobi > Order Details (GobiSmart).
- **Library** should review the existing Validation lists and edit if needed or add new ones as desired.
  - Settings viewable in
    - Gobi > Order Details
    - Gobi > Library > Administration > GobiSmart
  - Brief video demonstration of GobiSmart :  
<https://www.youtube.com/watch?v=TX7FeySMEe0>

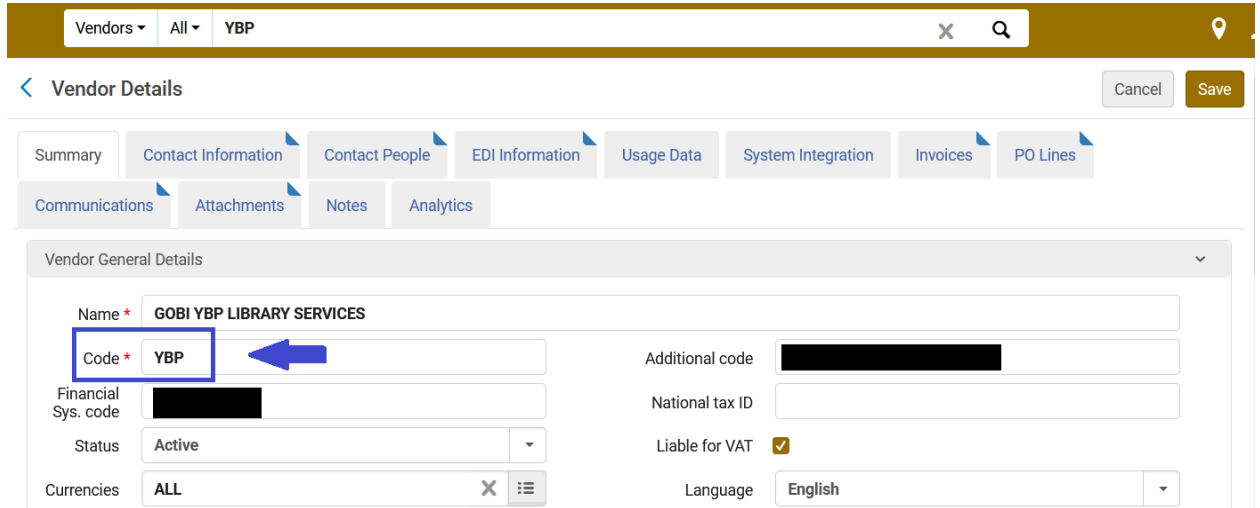
## IMAGES TO AID LIBRARY IN COMPLETING SETUP BASICS TAB

Images below are from the July 2024 release of Alma

- **Alma Data:**
  - Alma Data (PO Line Owner Code) can be found at General > Add a library or edit library information. The code is the last in the path, after the last dot so in the case of Art Library it is *art* for Built Environments Library it is *builtenv*. Remember, Alma is case sensitive so be sure to copy exactly.



- **Vendor Code:** Search for Vendors to get the details. On the Summary tab, look at the field called “Code”. Remember, Alma is case sensitive so be sure copy exactly.



Vendor Details

Summary Contact Information Contact People EDI Information Usage Data System Integration Invoices PO Lines Communications Attachments Notes Analytics

Vendor General Details

Name \* GOBI YBP LIBRARY SERVICES

Code \* YBP

Additional code

Financial Sys. code

National tax ID

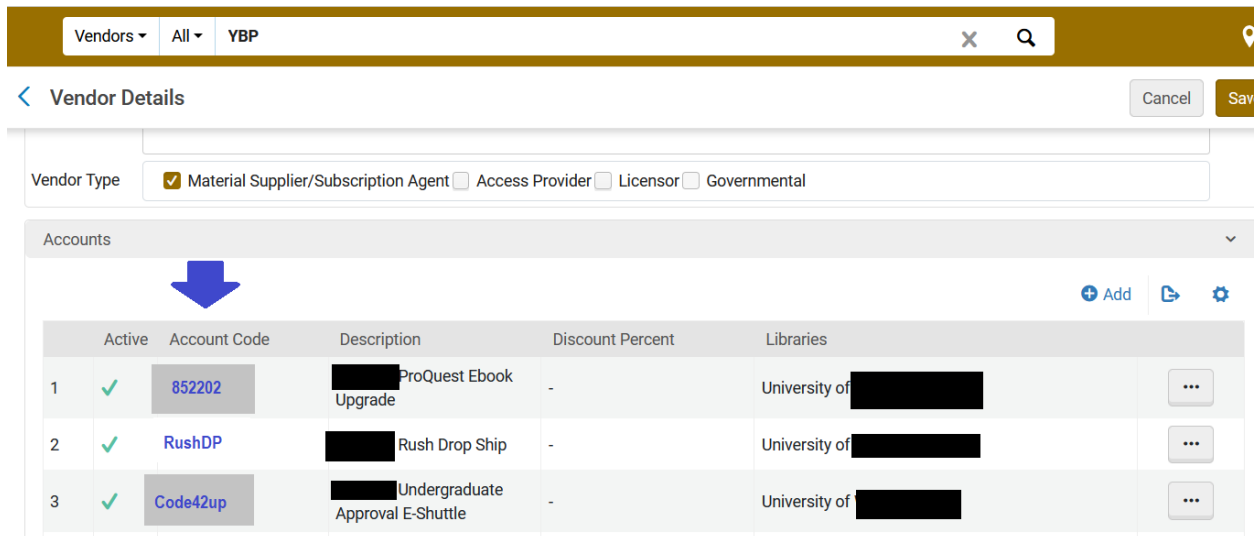
Status Active

Liable for VAT ☒

Currencies ALL

Language English

- **Account Code:** also found the Vendor summary page. They may be the same as your Gobi account but you might have set them up differently be sure to check! In the below examples, the codes are 852022 for the ProQuest Ebook Upgrade, RushDP for Rush Drop Ship, and Code42up for Undergraduate Approval E-Shuttle. Again, the codes are whatever you set them to be – and remember, Alma is case sensitive. Be sure to copy the code exactly.



Vendor Details

Vendor Type ☒ Material Supplier/Subscription Agent ☐ Access Provider ☐ Licensor ☐ Governmental

Accounts

Active	Account Code	Description	Discount Percent	Libraries
1	✓ 852202	ProQuest Ebook Upgrade	-	University of
2	✓ RushDP	Rush Drop Ship	-	University of
3	✓ Code42up	Undergraduate Approval E-Shuttle	-	University of