

Acquisitions Team

Project Name: Acquisitions Team

Project Sponsor: Alma Implementation Steering Committee

Project Description and Purpose:

The Acquisitions Team will be responsible for reviewing policies and procedures related to acquisitions activities, configuring the system appropriately, implementing the related Alma workflows, and ensuring that all staff involved with acquisitions activities are appropriately trained.

Project Assumptions:

- Alma offers the opportunity for significant improvement in managing acquisitions workflows
- All current workflows are open to examination and revision to gain maximum efficiency from Alma
- Some processes may change significantly, or be eliminated, by the move to Alma
- Alma workflows may necessitate policy or organizational changes
- The work of this team will at times require collaboration with other implementation teams, especially including the Electronic Resources Management Team

Project Scope:

This team will review Alma acquisitions documentation to understand the Alma acquisitions infrastructure and workflows. The team will create a plan for configuring the acquisitions infrastructure and workflow rules, including funds and ledgers, purchasing, assignment of appropriate staff roles, vendor information and communications, and integration with campus financial systems. The team will examine existing acquisitions processes and recommend changes in alignment with the new system. The team will coordinate and provide training and documentation on acquisitions processes within Alma.

Project Deliverables:

Initial Project Deliverables will include:

- *Preliminary Project Plan & Milestones*
- *Preliminary schedule/timeline of activities*
- *Define roles (as needed) for team members*

Note: The Alma Project Manager can assist you with completing these activities.

- Update and prepare for migration a list of vendors and accounts, including appropriate contacts
- Provide required configuration information for each campus
- Test setup of workflow rules, communications, APIs, and other automation features
- Coordinate as needed with campus financial systems
- Create a list of recommended acquisitions roles in Alma needed for staff in each functional area
- Conduct and coordinate training on acquisitions tasks in Alma

Project Milestones

- Project plan / timeline
- Vendor information compiled, updated, normalized, and prepared for entry
- Completion of steps in “Configuring Acquisitions” and “Configuring Workflow Rules” sections of Alma documentation
- Linking of system to campus financial systems
- Policies and planned workflows agreed upon and documented
- Training completed

Project Team Leader:

Nora Dethloff (UH)

Project Team Members:

Ian Knabe (UH)
 Yesenia Umaña (UH)
 Judy Parsons (UH)
 Selina Khan (UH)
 Shawn Vaillancourt (UH)
 Chat Steed (UHCL)
 Steve Bonario (UHD)
 Berina Gywnn (UH Law)

Project Stakeholders:

Serial and Monographic Acquisitions staff
 Collections staff and subject librarians
 Copy cataloging staff members
 Electronic Resources Team
 Users of library resources

Project Expenses:

No expenses foreseen

Project Approval Requirements:

Alma Implementation Steering Committee
Selectors / Liaisons (for materials selecting workflows)
Migration Team (for configuration)

Project Start and End Dates:

December 2018 - July 2019 (allows for continuation past go-live date to address any remaining issues)

Revision History/Change Control:

Note here any substantive changes to this project charter, including names and dates where applicable.

Changes to this document or other project parameters should be submitted in writing (paper or email) to the project manager and must be approved by the Alma Steering Committee.

Issue Log/Conflict Resolution:

For continuous improvement, project leads should capture any process problems in an Issue Log for review by the Alma Steering Committee. Project managers and Steering Committee members are available to assist in resolving conflicts that may arise during project execution.

Acknowledgments:

Both the project sponsor and the project team leader should acknowledge the contents of the project charter to confirm shared understanding of responsibilities and expectations.

Alma Steering Committee

Nora Dethloff

14 November 2018