TECHNICAL SERVICES Q&A WILL START SHORTLY



The webinar will start at 10:30 am and run until noon.

Please mute your microphone and webcam.

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed.

This session will be recorded and made available on the CARLI website both as PDF slides and as a recording, with live links to all referenced resources.

Today's slides: https://www.carli.illinois.edu/tech-services-qa-20220526

Past webinars: https://go.illinois.edu/CARLItsqa

CARLI

TECH SERVICES Q&A 5/26/2021
GOBI SHELF-READY ACQUISITIONS

TODAY'S AGENDA

- Announcements
- GOBI Shelf-Ready Acquisitions
 - Jacqueline Zook (NEIU) and Ted Schwitzner (CARLI)
- Q&A

Reminders:

- CARLI Open Office Hours: June 9, User Management
- ELUNA Learns coming up in Summer
 - More information coming soon
- Next Alma Monthly Release is June 5
 - Covers resolved issues only; next featured release in August
 - Release schedule

Today's slides available on the event page:

https://www.carli.illinois.edu/tech-services-qa-20220526

GOBI Shelf-Ready Acquisitions

Jacqueline (Jackie) Zook, NEIU
Technical Services Coordinator
Ted Schwitzner, CARLI
Senior Library Services Coordinator

Why should we use GOBI?

- Streamline workflows for shelf-ready processes
- More accurate CARLI inventory via GoBetween
- More spent = bigger discount
- Contractual obligation

Configuration Overview

Electronic Order Data (brief) Import profile

- Local
- Vendor

Merge/Overlay Import Profile

- Local
- Vendor

Electronic Data Interface for Invoices and Orders

- Local
- Vendor

EOD (brief) import profile

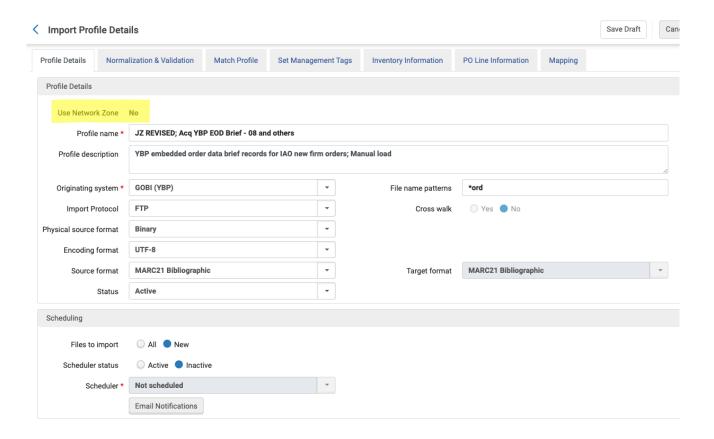
Local configuration

- Tech Specs from YBP
- CARLI documentation: https://www.carli.illinois.edu/products-services/i-share/acquisitions/acq_eod_import
- Examine profile in ALMA for NEIU

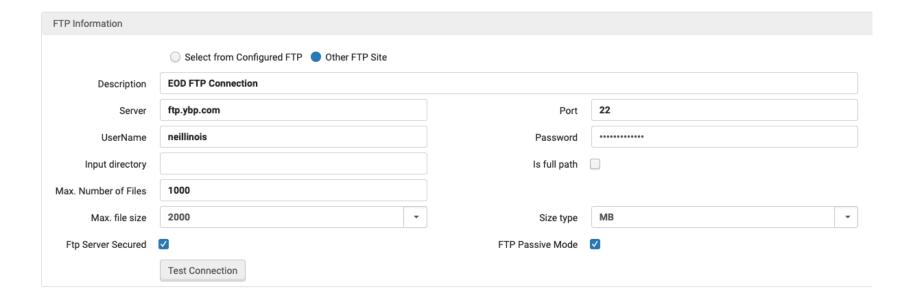
Vendor

- What are the current data fields?
- Do you need to customize data fields?
 - YBP maps the fund
 - Edit our location codes to display in cap letters
 - Configure variable data field to display subject code

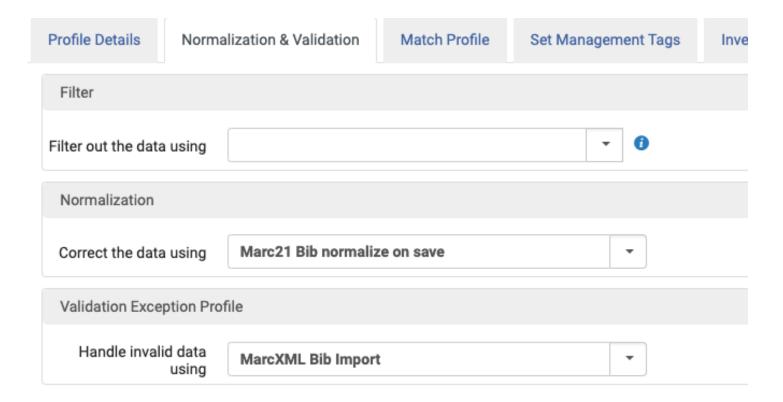
Profile Details Tab



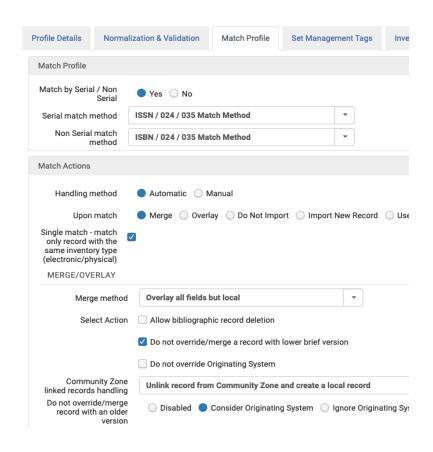
FTP configuration

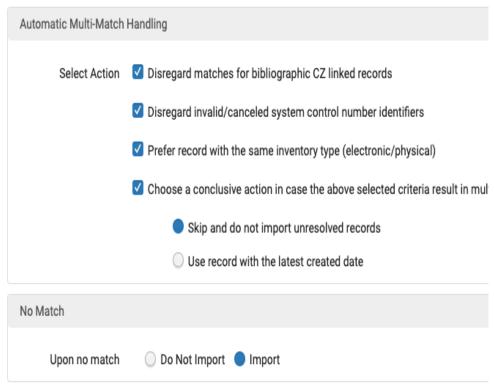


Normalization/Validation



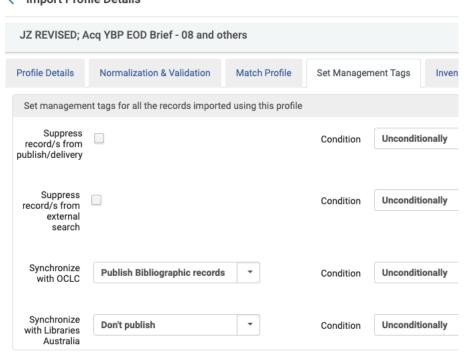
Match Profile



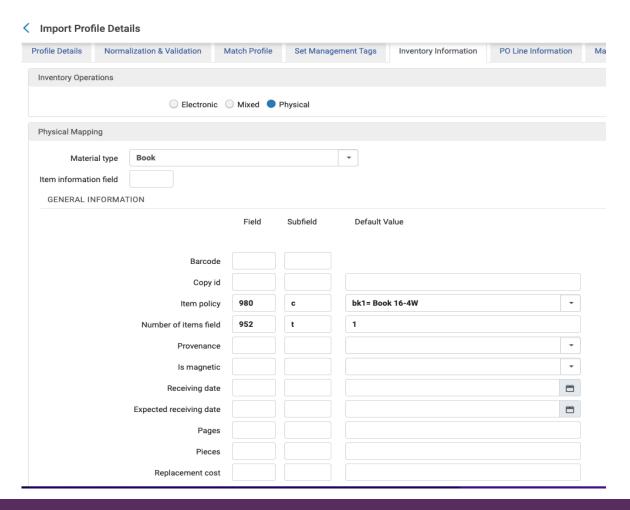


Set Management Tags

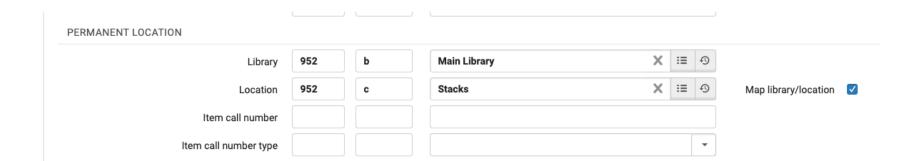
Import Profile Details



Inventory Information



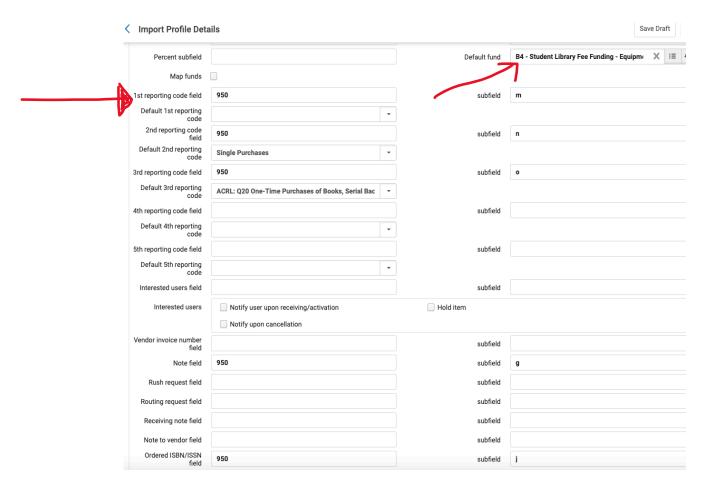
Inventory Information



PO Line Information

Import Profile Details Save Draft JZ REVISED; Acq YBP EOD Brief - 08 and others **Profile Details** Normalization & Validation Match Profile Set Management Tags Inventory Information PO Line Information Mapping **EOD General Parameters** Physical PO Line type * Physical - One Time • Multiple vendors × Yankee Book Peddler ∷≡ Ð Main - Process/PromptCat Vendor Vendor account 0 PO Line currency USD Decimal point location **Purchase at Vendor System** Acquisition Method EOD mapping Additional PO line subfield q reference field Vendor Reference 035 subfield а Number field Vendor Reference 024 subfield а Number type field 950 d List price field subfield Vendor title number subfield Volume Part Number 950 subfield g field PO number field subfield PO Line Owner field subfield **Main Library** ∷≡ Default PO Line owner Map Owner

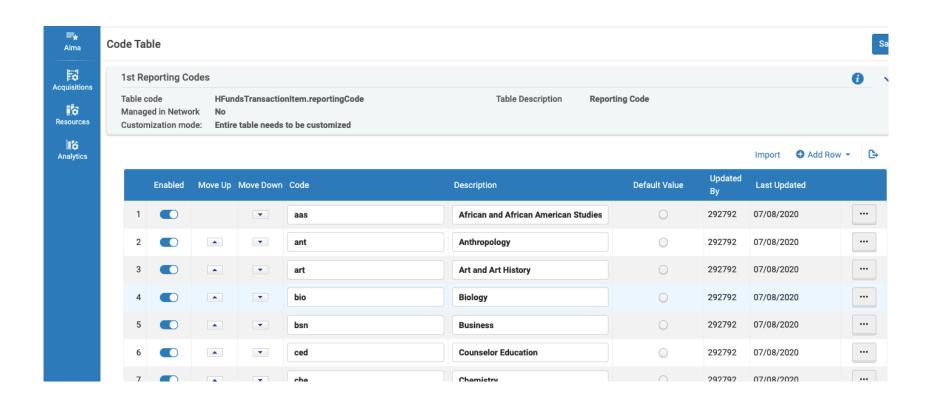
PO Line Information



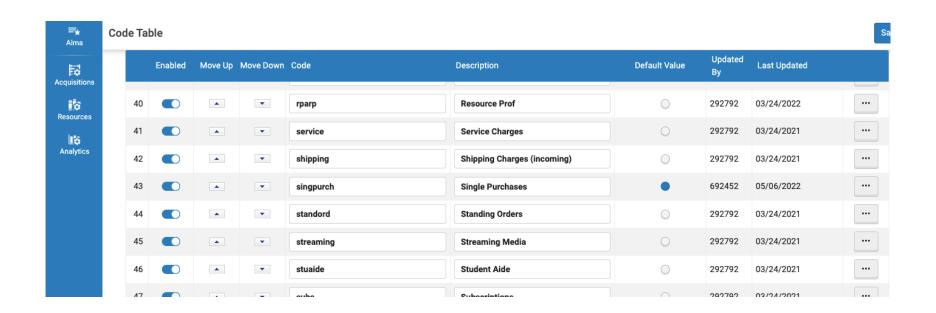
Configuration menu



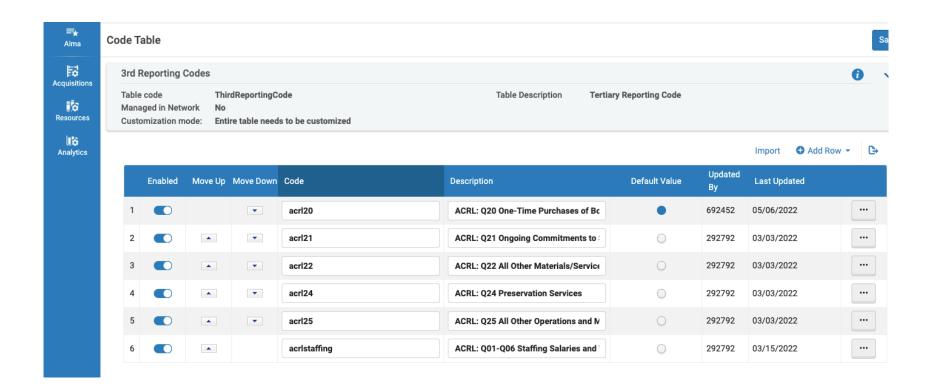
1st reporting code – variable data



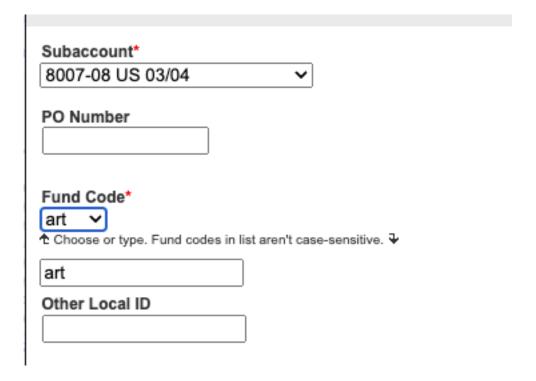
2nd reporting code



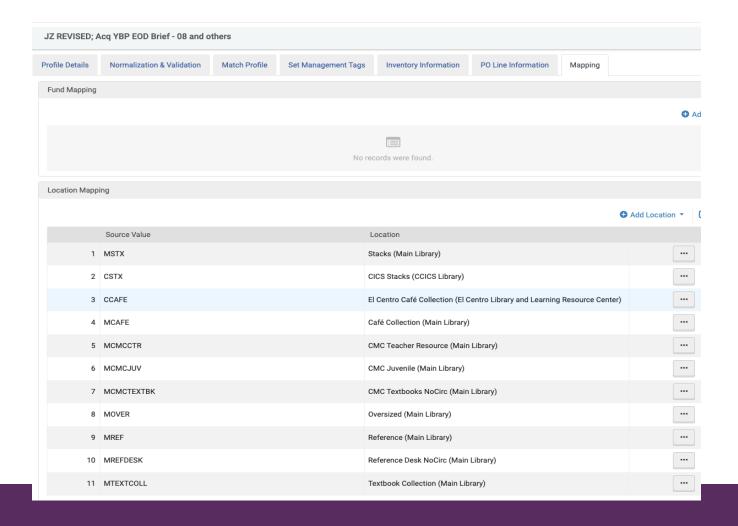
3rd reporting code



Fund/subject field in GOBI



Mapping in ALMA



GOBI edit of location codes



EOD Import Demonstration

```
LDR 00000nam 2200000Ka 4500
```

- =008 220524s2021\\\\\\\\\\\000\0\eng\d
- =020 \\\$a9781440873522
- =024 8\\$a454456644
- =035 \\\$a1056234758
- =100 1\\$aLAWSON, RUSSELL M.
- =245 10\$aSCIENCE IN THE ANCIENT WORLD: \$b FROM ANTIQUITY THROUGH THE MIDDLE AGES.
- =950 \\\$d109.00\$eBKAV\$mPRINTBOOK
- =980 \\\$pBOOK
- =952 \\\$bCHICAGO\$cstacks\$t1\$qP

Overlay import profile

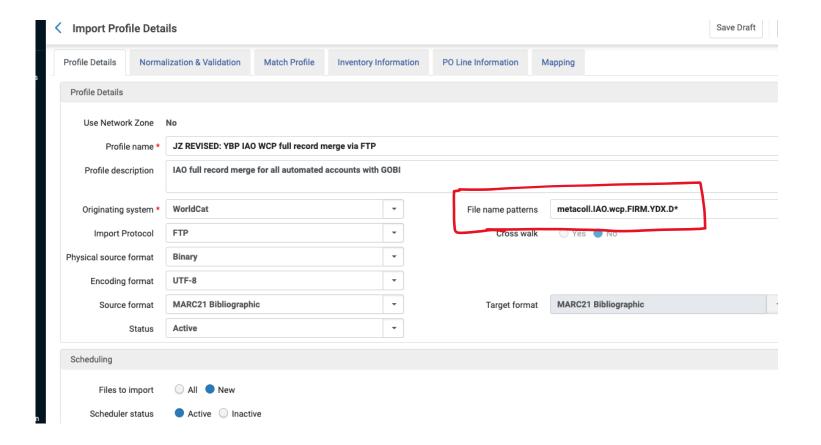
Local configuration

- What information is needed that was not previously configured
- Make sure match points are correct mapping

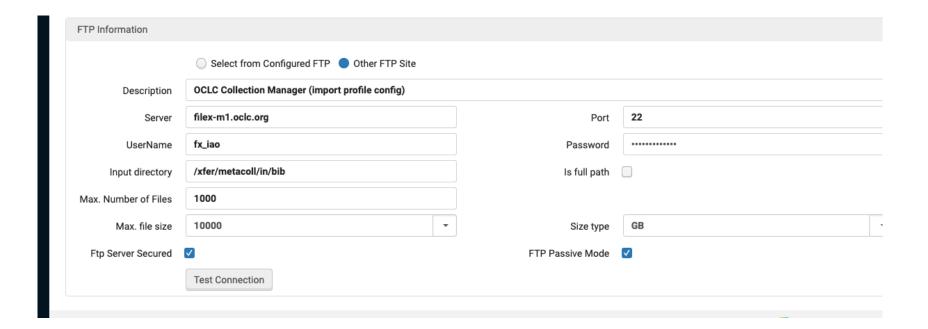
Vendor

- YBP matching data fields with OCLC
- OCLC WorldShare Collection Manager
 - https://www.oclc.org/en/services/logon.html

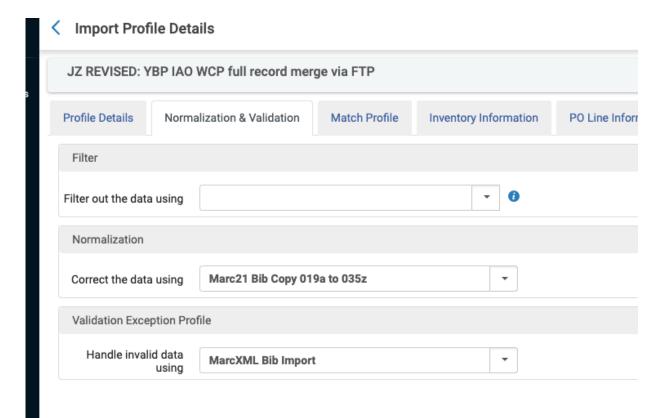
Profile details



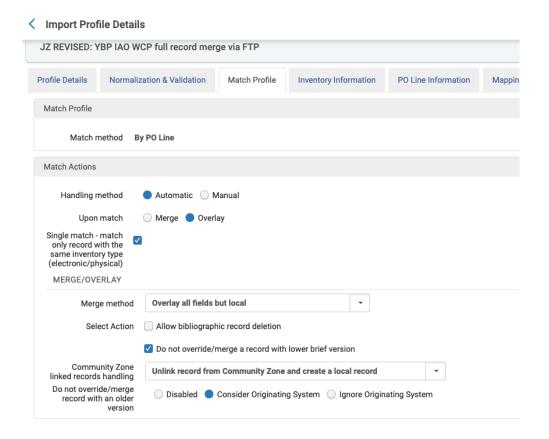
FTP configuration



Normalization and validation



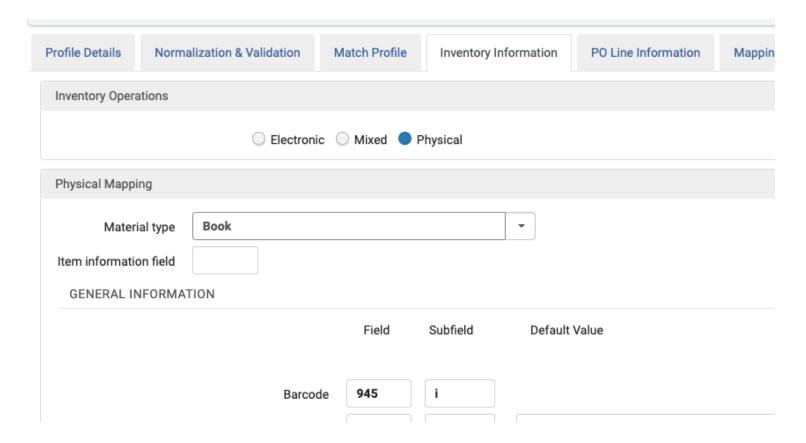
Match profile



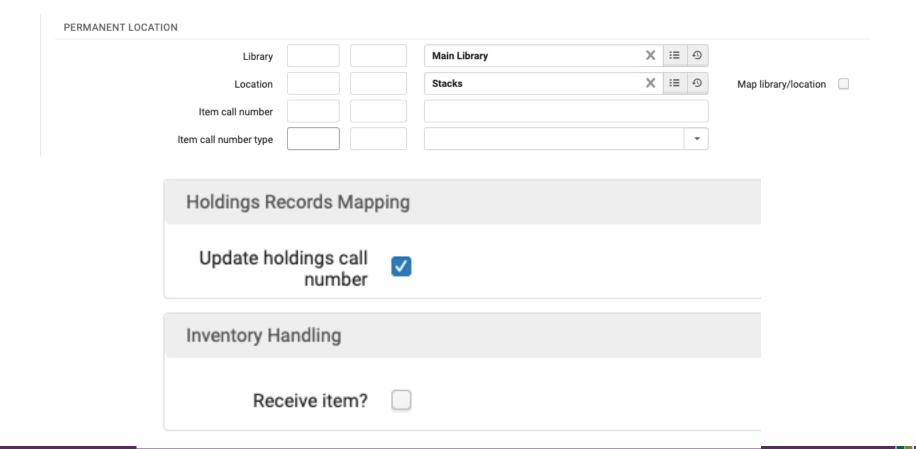
Match profile

Automatic Multi-Match Handling Select Action Disregard matches for bibliographic CZ linked records Disregard invalid/canceled system control number identifiers Prefer record with the same inventory type (electronic/physical) Choose a conclusive action in case the above selected criteria result in multiple records: Skip and do not import unresolved records Use record with the latest created date

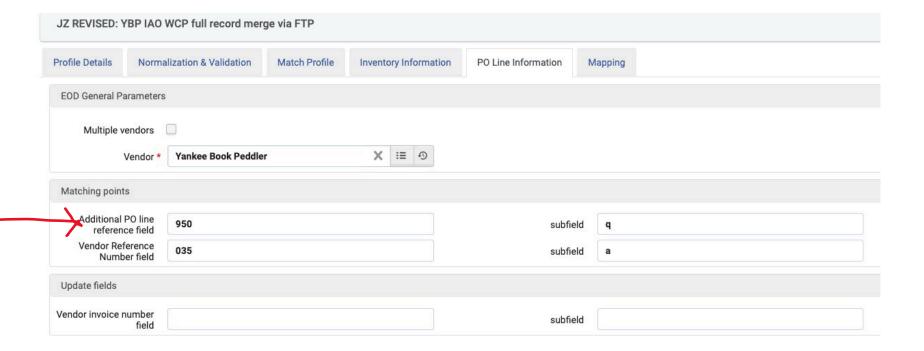
Inventory information



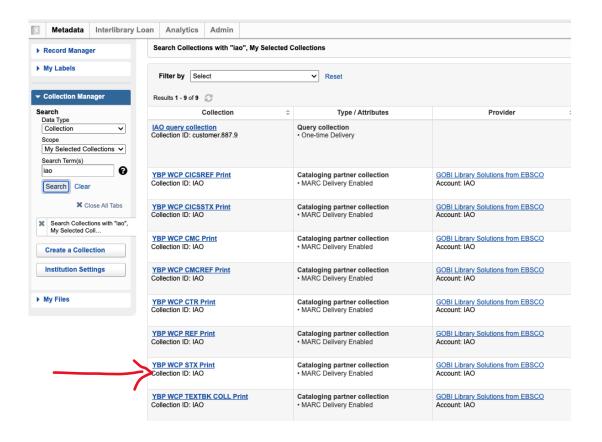
Inventory information



PO Line information



OCLC WorldShare Collection Manager



Shelf-Ready Overlay Demonstration

```
=LDR 04778cam a2200493 i 4500
=001 on1231580249
=003 OCoLC
=005 20220524063326.0
=008 210607s2021\\\\cau\\\\\\be\\\001\0\eng\\
=010 \\$a 2021023080
=040 \\$aDLC\$beng\$erda\$cDLC\$dYDX\$dOCLCO\$dOCLCF\$dYDX\$dOKN\$dQX7\$dYDX\$dWIS\$dVAN\$dOCLCO\$dS1C
=019 \\$a1284916656
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=082 00$a509.3$223
=092 \\$a509.3\$bLAWSON\$9local
=049 \\$alLLA
=100 1\$aLawson, Russell M.,$d1957-$eauthor.
=245 10$aScience in the ancient world:$bfrom antiquity through the middle ages /$cRussell M. Lawson.
=264 \1$aSanta Barbara, California:$bABC-CLIO, an imprint of ABC-CLIO, LLC,$c[2021]
=300 \\$axxviii, 594 pages ;$c27 cm
=980 \\$a454456644
=952 \\$p31234587905261
=938 \\$aYBP Library Services$bYANK$n17218270
```

EDI for invoices/orders

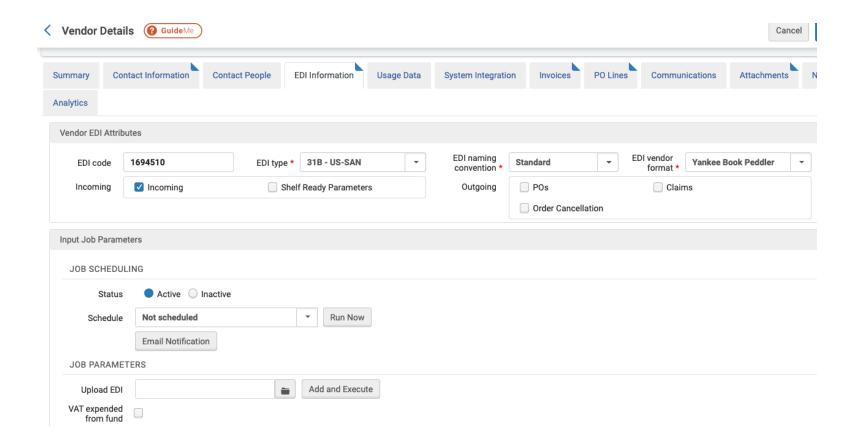
Local

- Locate in vendor record EDI tab
- https://knowledge.exlibrisgroup.com/Alma/Product_Document ation/010Alma_Online_Help_(English)/020Acquisitions/070In voicing/020Creating_Invoices

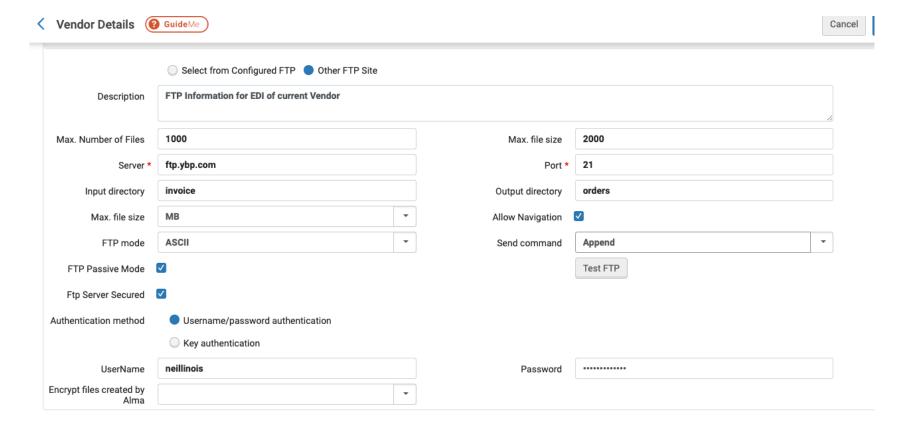
Vendor

Secure connection with server

YBP – EDI tab



YBP – FTP configuration



YBP – local account information



How to retrieve invoices

Purchase Order Lines

Order Without Inventory

Review (PO line)

Claim

Renew

Review Deferred

Manage Trials

Manage EDI Tasks

Purchase Order (PO)

Package

Review (PO)

Approve

Delete PO

Purchase Requests

Create Purchase Request

Manage Purchase Requests Check Availability and Pricing

Receiving and Invoicing

Receive

Create Invoice

Review (Invoice)

Approve (Invoice)

Ready to be Paid

Waiting for Payment

Post-Receiving Processing

Receiving Department Items

Scan In Items

Import

Manage Import Profiles

Import

Monitor and View Imports

Resolve Import Issues

Acquisitions Infrastructure

Vendors

Funds and Ledgers

Licenses

Advanced Tools

Exchange Rates Report

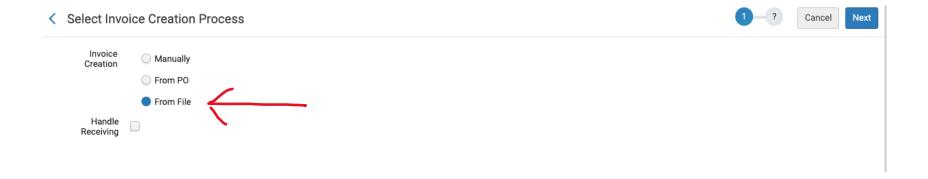
Patron Driven Acquisition (PDA)

Change Vendor In Order

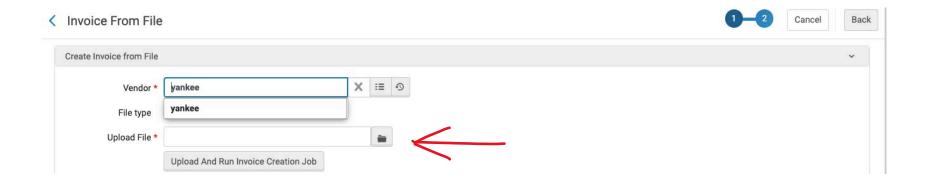




Create invoice

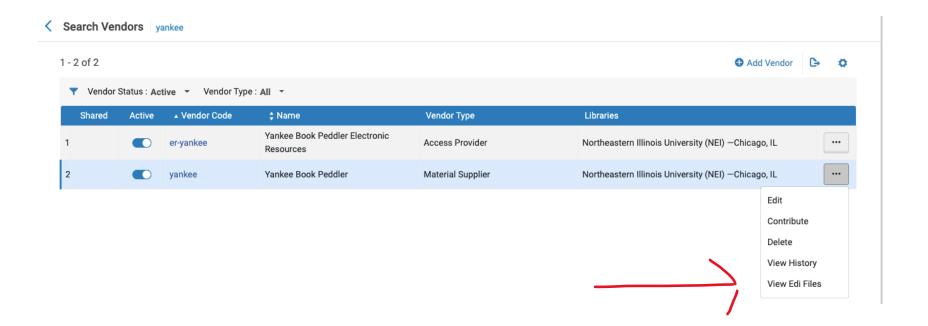


Invoice from EDI file



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Acquisitions infrastructure



EDI Demonstration

```
UNA:+.? '
UNB+UNOC: 2+1694510: 31B+3044777: 31B+220126: 0609+619'
UNH+1042+INVOIC:D:96A:UN:EAN008'
BGM+380+161165'
DTM+137:20220125:102'
CUX+2:USD:4'
ALC+C++++DL::28:Freight Charges'
MOA+8:1.64'
LIN+1'
PIA+5+1440873526:IB'
IMD+L+050+:::SCIENCE IN THE ANCIENT WORLD?: FROM'
IMD+L+050+:::ANTIQUITY THROUGH THE MIDDLE AGES.'
IMD+L+010+:::LAWSON, RUSSELL M., 1957-'
IMD+L+110+:::SANTA BARBARA'
OTY+47:1'
MOA+203:109'
PRI+AAB: 109'
RFF+LI:POL-14342'
RFF+SLI: 454456644'
UNS+S'
CNT+1:1'
CNT+2:1'
MOA+9:110.64'
MOA+79:109'
UNT+23+1042'
UNZ+1+619'
```

CARLI EOD Import Profile:

https://www.carli.illinois.edu/products-services/i-share/acquisitions/acq_eod_import

Ex Libris Managing Import Profiles:

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/060Record_Import/020Managing_Import_Profiles

Ex Libris Electronic Data Interchange:

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/020Acquisitions/020Electronic_Data_Interchange_(EDI)

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