CARLI
I-Share

Welcome!

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

- 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	Merge/Overlay Import Profile	Electronic Data Interface for Invoices and Orders
• Local • Vendor	• Local • Vendor	• 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

FTP Information

○ Select from Configured FTP ● Other FTP Site

Description	EOD FTP Connection		
Server	ftp.ybp.com	Port	22
UserName	neillinois	Password	••••••••••••••
Input directory		Is full path	☐
Max. Number of Files	1000		
Max. file size	2000	Size type	MB
Ftp Server Secured	☑	FTP Passive Mode	☑

Test Connection

Normalization/Validation

Match Profile

Set Management Tags

Inventory Information

Inventory Information

PO Line Information

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	☐			
Vendor	Yankee Book Peddler ✕ ☰ ⟲		Vendor account	Main - Process/PromptCat
PO Line currency	USD ▼		Decimal point location	0
Acquisition Method	Purchase at Vendor System ▼			

EOD mapping

Additional PO line reference field		subfield	q
Vendor Reference Number field	035	subfield	a
Vendor Reference Number type field	024	subfield	a
List price field	950	subfield	d
Vendor title number field		subfield	
Volume Part Number field	950	subfield	g
PO number field		subfield	
PO Line Owner field		subfield	
Default PO Line owner	Main Library ✕ ☰ ⟲	Map Owner	☐

PO Line Information

Import Profile Details   Save Draft

Percent subfield		Default fund	**B4 - Student Library Fee Funding - Equipm** ✕ ☰
Map funds	☐		
1st reporting code field	**950**	subfield	**m**
Default 1st reporting code	▼		
2nd reporting code field	**950**	subfield	**n**
Default 2nd reporting code	**Single Purchases** ▼		
3rd reporting code field	**950**	subfield	**o**
Default 3rd reporting code	**ACRL: Q20 One-Time Purchases of Books, Serial Bac** ▼		
4th reporting code field		subfield	
Default 4th reporting code	▼		
5th reporting code field		subfield	
Default 5th reporting code	▼		
Interested users field		subfield	
Interested users	☐ Notify user upon receiving/activation ☐ Notify upon cancellation	☐ Hold item	
Vendor invoice number field		subfield	
Note field	**950**	subfield	**g**
Rush request field		subfield	
Routing request field		subfield	
Receiving note field		subfield	
Note to vendor field		subfield	
Ordered ISBN/ISSN field	**950**	subfield	**j**

Configuration menu

Alma
Acquisitions
Resources
Analytics

Purchase Orders
1st Reporting Codes
2nd Reporting Codes
3rd Reporting Codes
4th Reporting Codes
5th Reporting Codes
Purchasing Review Rules
Shipping Method
PO Line Cancellation Reasons
PO Line Types
PO Line Deferral Reasons
Acquisition Method
EDI Vendor Note Fields
PO Line Price Threshold

Invoices
Invoice Review Rules
Invoice Approval Rules
Disapproval Reasons
VAT Codes
Payment Method
Invoice Line Types

Purchase Requests
Purchase Request Reject Reasons
Purchase Request Material Types

General
Other Settings
Currency Subset
Fund and Ledger Fiscal Period
Receiving Department Validations
Fund Types
Acquisition Jobs Configuration
Subscribers
Legal Deposit Reports
Survey Question Multiple Choice
Manage Acquisitions Alerts

1ˢᵗ reporting code – variable data

2nd reporting code

3rd reporting code

Fund/subject field in GOBI

Mapping in ALMA

JZ REVISED; Acq YBP EOD Brief - 08 and others

| Profile Details | Normalization & Validation | Match Profile | Set Management Tags | Inventory Information | PO Line Information | Mapping |

Fund Mapping

⊕ Ad

▤

No records were found.

Location Mapping

⊕ Add Location ▾

	Source Value	Location	
1	MSTX	Stacks (Main Library)	⋯
2	CSTX	CICS Stacks (CCICS Library)	⋯
3	CCAFE	El Centro Café Collection (El Centro Library and Learning Resource Center)	⋯
4	MCAFE	Café Collection (Main Library)	⋯
5	MCMCCTR	CMC Teacher Resource (Main Library)	⋯
6	MCMCJUV	CMC Juvenile (Main Library)	⋯
7	MCMCTEXTBK	CMC Textbooks NoCirc (Main Library)	⋯
8	MOVER	Oversized (Main Library)	⋯
9	MREF	Reference (Main Library)	⋯
10	MREFDESK	Reference Desk NoCirc (Main Library)	⋯
11	MTEXTCOLL	Textbook Collection (Main Library)	⋯

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

FTP Information

◯ Select from Configured FTP ● Other FTP Site

Description	**OCLC Collection Manager (import profile config)**

Server	**filex-m1.oclc.org**	Port	**22**
UserName	**fx_iao**	Password	••••••••••••
Input directory	**/xfer/metacoll/in/bib**	Is full path	☐
Max. Number of Files	**1000**		
Max. file size	**10000** ▾	Size type	**GB** ▾
Ftp Server Secured	☑	FTP Passive Mode	☑

Test Connection

Normalization and validation

Match profile

Import Profile Details

JZ REVISED: YBP IAO WCP full record merge via FTP

| Profile Details | Normalization & Validation | Match Profile | Inventory Information | PO Line Information | Mappin |

Match Profile

Match method   **By PO Line**

Match Actions

Handling method   ● Automatic ○ Manual

Upon match   ○ Merge ● Overlay

Single match - match only record with the same inventory type (electronic/physical)   ☑

MERGE/OVERLAY

Merge method   **Overlay all fields but local** ▾

Select Action   ☐ Allow bibliographic record deletion

☑ Do not override/merge a record with lower brief version

Community Zone linked records handling   **Unlink record from Community Zone and create a local record** ▾

Do not override/merge record with an older version   ○ Disabled ● Consider Originating System ○ Ignore Originating System

Match profile

version

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

JZ REVISED: YBP IAO WCP full record merge via FTP

| Profile Details | Normalization & Validation | Match Profile | Inventory Information | PO Line Information | Mapping |

EOD General Parameters

Multiple vendors ☐

Vendor * | Yankee Book Peddler | ✕ | ☰ | ⟲

Matching points

Additional PO line reference field | 950 | subfield | q

Vendor Reference Number field | 035 | subfield | a

Update fields

Vendor invoice number field | | subfield |

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
=020  \\$a9781440873522$qhardcover
=020  \\$a1440873526$qhardcover
=020  \\$z9781440873539$qelectronic book
=035  \\$a(OCoLC)1231580249$z(OCoLC)1284916656
=042  \\$apcc
=050  00$aQ124.95$b.L394 2021
=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_Documentation/010Alma_Online_Help_(English)/020Acquisitions/070Invoicing/020Creating_Invoices

Vendor

– Secure connection with server

YBP – EDI tab

YBP – FTP configuration

YBP – local account information

Per Organization Unit EDI

1 - 1 of 1   ⊕ Add Organization Unit ▾   ⟶

	⇅ Organisation Unit	⇅ EDI code	▲ EDI type	
1	Northeastern Illinois University (NEI) —Chicago, IL	340191X	31B - US-SAN	···

EAN per Account code

1 - 1 of 1   ⊕ Add EAN ▾   ⟶

	⇅ Account code	▲ EAN Code	
1	8007-08	8007-08	···

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

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'
QTY+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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