



Eluna Learns Acquisitions Session Q & A

Moriah, what happens if the GOBI order API doesn't find a record in the NZ, can it create a brief bif in the IZ (we wouldn't want it in the NZ)?

Moriah Guy: Yes, a brief record is created.

What is the advantage of using the import profiles vs using EDI for ordering?

Moriah Guy & Christine Dunleavy: They're completely separate forms of acquisitions workflows, and of course all acquisitions workflows have pluses and minuses. Many libraries that like using the import profiles instead are doing so because they take full advantage of GOBI and may be using GOBI for selection of titles, or for finding titles. Also, there are some types of orders that GOBI can't accept EDI orders for such as Rush orders and Book Zone orders. I don't think the import profiles I demonstrated are advantageous or preferential to using GOBI's API. The import profiles are used to develop those po line data. Like most "templates," an import profile can be seen as a type of template, which accurately handles tediously repetitive details by assigning a set of instructions to be applied to a specific data set. The instructions are stored in the import profile. Each time you bring in a new dataset, you'll select which import profile has the correct location, item policy, classification, eBook collection, etc. instructions to apply to that dataset.

Ideally, you'll have one import profile for one data set. Each time you load that data, you'll review the results and see if you can improve the import profile's performance. For example, you may want to set up, like I did, an import profile to handle GOBI approval orders or monographs that you have on auto-ship. For example, my library gets every single juvenile monograph that received an award.

You won't be using the API for titles that auto-ship to you at irregular intervals, but you can pick up the MARC21 records from a bibliographic utility when, in my case, juvenile books, are invoiced and shipped. Then, applying Alma's import profile for these juvenile books, a PO line is created, a full MARC21 bibliographic record is added, a holdings record with correct location and either one or two of our juvenile classifications (E/F or Dewey) is created, item with the correct item policy is added. And, since it's "scheduled," I don't do any manual work to create all these data.

When you're satisfied with the import profile, you can schedule the exchange of data between servers which saves logging on to servers and trying to remember which data file goes with which import profile.

You can use a Gobi note field to automate populating the Interested User in Alma. If that's helpful.

Christine Dunleavy: Thank you for that insight. There must be some way of referencing data that's in the patron database, so I'll look into that option in GOBI. Currently, we're manually adding "interested user" in Alma rather than when we're in GOBI making the purchase, which is less than perfect. Thanks for the tip!

If we already have a brief record (created from Purchase requests), can the GOBI automation still work?

Moriah Guy: Technically it will still work, but it won't attach to that POL. It would create a separate POL that would then be dual work for the library to remove the one created by the Purchase request because invoicing will only use the API's POL.

We can't generate a POL # without a record - so I don't understand how the process starts if we can't have a bib record already?

Moriah Guy: The API creates the record automatically.

Can you explain how 9100 translates to History in reporting code?

Christine Dunleavy: In Alma, go to Configuration>Acquisitions>>1st reporting codes (or, 2nd , etc.) and you'll find a table that you can build using any vocabulary you wish to use. I assigned the code "9100" to correlate to "US history" in my instance of Alma. Then, I enter that "9100" in GOBI when I add the ordering details. Then, when the order is placed, that information populates the PO line's reporting code. When you look at it in the PO line, it will read "US history," but I have to use its' numeric equivalent from inside GOBI's order details or templates. I use this reporting code to I can identify what portion the annual materials budget was used to support the History academic department. Please email me at cdunleavy@usf.edu for more information. Thanks!

Enabled	Code	Description	Translation
4... <input checked="" type="checkbox"/>	8300	St Petes awards	St Petes awards
4... <input checked="" type="checkbox"/>	8500	STEM	STEM
4... <input checked="" type="checkbox"/>	8900	Textbook	Textbook
5... <input checked="" type="checkbox"/>	9100	U.S. history	U.S. history

How does the library find brief bibs created by the API?

Moriah Guy: I know some libraries have notifications on new Purchase Orders and find them that way.

Can the Alma API match to isbn's already in the NZ rather than create a brief bib?

Moriah Guy: Yes, it can but this is a setting controlled on the Alma side in the configuration menu of Alma under the integration profiles.