Functional Call - August 4 2016

1. In the video about import profiles (ACQ 1- the first video) it discussed overlaying brief bib records with full bib records when items are received by matching on the PO Line. How does this work as a consortium? What if another campus has already put a full bib record in for an item, how does our PO line get associated with that item that is already in the system? Does this make sense?

Answer: Inventory is stored on IZ level. Matching on PO Line is used only in ‘Update Inventory’ profile. It becomes possible because PO Line was associated with the item when EOD file (new order file) was loaded.

How to prevent updating of records that are already fully cataloged and shouldn’t be updated?

Import profile has option to use indication rule. Indication rule can be created to identify records that should not be changed or are not brief. Those records can be filtered out by the rule and not updated.

There is also an option in the import profile do not overlay full record by brief record.

1. Would we need to mark the "multiple vendors" box in the New Order Profile if an order has been transferred to a new vendor? Or would we just create a new order profile?

Answer: Multiple vendor’s option was added to enable importing records from multiple vendors in one input file. There are use cases when 3rd party company provides such files.

<http://knowledge.exlibrisgroup.com/Alma/Training/03_What's_New_Videos_2014/09_April_2014_Release/Multiple_Vendors_in_EOD_Import_File>

You may need to create a new profile if input file details are different from current vendor or requires to set different profile parameters.

1. Can you provide an example of using the fund allocation loader to adjust the funds?

Answer: Fund allocation loader is used to synchronize fund amounts between Alma and financial system.

This process was created in order to automate fund allocation update in Alma. It updates fund ‘Allocation’ transaction type in Alma.

See for additional information:

<https://developers.exlibrisgroup.com/alma/integrations/finance/fund>

1. We have a question about import profiles. It is our understanding that when using import profiles Alma does not make a distinction between $a (International Standard Book Number) and $z (Canceled/invalid ISBN) in the MARC 020 (ISBN). Is that correct, and if so, are there plans to resolve this?

Answer: By default, this field is populated by the first identifier listed in the bibliographic/imported record’s ISBN/ISSN (020/022) field. However, a different value can be selected from the proposed identifier drop-down list. No distinction by sub-field in 020/022.

1. In the list of Purchase Review Rules and Invoice Review Rules available in the [Online Help](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Acquisitions/110Configuring_Acquisitions/030Configuring_Purchasing_Review_Rules), there are several Assertion codes marked “not in use” (e.g., for Purchase Review Rules, Invoicing Status, Open Claims exist for this PO Line, Receiving Status are all listed as “not in use”). Why are these codes not in use?

Answer: ‘Not in Use’ means that those codes have no effect/or there is no program behind the code. The codes were inserted to the table in some purpose, but development was not done or it is there for future development.

Purchasing review rules apply only to PO lines created automatically. Those codes are not currently relevant for the workflows, like ‘Open Claims exist for this PO Line’ – when PO line just created there are no claims yet.

**Chat transcript**

from Mark B (Los Angeles) (privately):

And so the excel file can have only those funds that are changing, or does this require a whole replacement like some other functions in alma?

from Mark B (Los Angeles) (privately):

(Thank you)

from SJSU TS (privately):

So...we wouldnt update using fund allocation loader every time we process invoices in financial system?

to SJSU TS (privately):

I believe not - the fact that an invoice line gets loaded to Alma would process the invoice transactions just as if you had added the line directly.

from SJSU TS to Everyone:

Sounds good. Thank you.

from David Walker to Everyone:

Just an FYI that the CO and San Marcos are working on a centrally developed process for this type of financial integration. The CSU has a common financial system, so this need not be done campus by campus.

from David Walker to Everyone:

Nothing from me at this point

from Alice Kawakami-CSU (privately):

nothing from me

from Alice Kawakami-CSU (privately):

thanks!

from Brandon Dudley to Everyone:

Thanks

from SJSU TS to Everyone:

Thank you!