ALEPH-RELATED CAPABILITIES

Orders

Types of GOBI Library Solutions records that are supported by Aleph:

> Electronic order confirmation records
> GobiExport records
> GOBI Library Solutions metadata records, with or without OCLC-compatible additions
> OCLC WorldShare Collection Manager (formerly WCP or PromptCat) records
> EDIFACT invoicing
>
> Plus EDIFACT purchase orders output from Aleph

Possible order workflows:

A. GOBI ordering/load EOCRs

1. Selection by collection development or acquisitions on GOBI (optional)

2. Orders placed on GOBI; MARC-formatted electronic order confirmation records output by 5 p.m. the next day.

3. Order confirmations ftped & loaded into Aleph to create brief bibliographic record, order record, and encumber funds; GOBI order key is loaded as match point for later bib record overlay and electronic invoicing.

4. At point of receipt, GOBI Library Solutions, or OCLC-supplied metadata can overlay provisional record, matching on GOBI order key.

5. Library loads EDIFACT invoice, which matches on GOBI order key.

B. EDIFACT ordering

1. Create bibliographic record in Aleph (download from GOBI (as a GobiExport record), OCLC, other utility, or key). GobiExport only works easily for libraries with one GOBI Library Solutions ordering subaccount. If more than one ordering subaccount, libraries will need to consider downloading bib records from OCLC or other utility or else using the EOCR workflow.

2. Create purchase order in Aleph and transmit to GOBI Library Solutions as an EDIFACT order.

3. At point of receipt, library can load GOBI Library Solutions or OCLC-supplied records to overlay acquisitions bib records.

4. Library loads EDIFACT invoice, which matches on Aleph PO number.

Approval Plans

Types of metadata records that are supported by Aleph:

GobiShip records
GOBI Library Solutions Metadata records, with or without OCLC-compatible additions
OCLC WorldShare Collection Manager (formerly WCP or PromptCat) records

Possible approval workflow:

1. GOBI Library Solutions outputs brief shipping records, metadata records, or facilitates the production of WCM records.

2. Library loads records to Aleph using the p_file_96 loader to create brief (if GobiShip records) or full bibliographic records, purchase order records, and encumbrances. GOBI Order Key is loaded to the order record as a vendor reference number to serve as a matchpoint for electronic invoicing. Fund code and/or location code can be defaulted in the loader or supplied by GOBI Library Solutions for each item, based on pre-determined approval profile mappings. If shipments are physically processed, barcode numbers can also be loaded into the item records automatically.

3. Library reviews the purchase orders, and receives the items.

4. Library finishes the cataloging process (by overlaying the brief bibliographic record with a full record, or by reviewing the full record).

5. Library creates electronic invoicing via EDIFACT invoices, matching on GOBI Order Key. If the library prefers not to have to load a separate EDI invoice, the library may create electronic invoicing based on invoice data delivered in the MARC record, using programming developed by Jon Rothman, Univ. of Michigan.

Other Aleph Electronic Services Supported by GOBI Library Solutions

Electronic Order Confirmations (a.k.a. Electronic Status Reports)
The EDIFACT version can load to Aleph, matching on GOBI order key for GOBI-generated orders or on Aleph PO number of Aleph-generated orders. Note that EDIFACT status messages are standardized and are not as detailed as GOBI Library Solutions' traditional status reports. GOBI Library Solutions also supplies a corresponding XML file with our more detailed status information. [Note: there is a pending modification at GOBI Library Solutions to reconfigure the matchpoint data in these eStatus Reports to be in the fields preferred by Aleph.]

Electronic Serials Invoicing
GOBI Library Solutions can supply EDIFACT serials invoices to load to Aleph, matching on Aleph PO number. These invoices carry piece-level identifying information (volume number, year, or lacking either of those, the ISBN), so that the library can determine which piece the particular payment represents.