

Chat Log C:\Users\samantha\OneDrive - System Wide Automated Network\Documents\ChatLog Acquisition Users 2021_03_11 11_08.rtf

Vickie Totton (to Everyone): 9:26 AM: you should have it now

Rebecca Bartlett (LGS) (to Everyone): 9:37 AM: Are Glenside, Roselle and Warrenville creating manual invoices only in BC Acq?

Rebecca Bartlett (LGS) (to Everyone): 9:38 AM: Sorry, my question should have been, how are they NOT creating manual invoices?

Ann Marie Lindsey (to Everyone): 9:44 AM: What is "Selection List Import"?

Katie Cangelosi (to Everyone): 9:45 AM: I may have missed this, sorry if I did, but do we have an estimated timeline?

Ann Marie Lindsey (to Everyone): 9:45 AM: Thank you!

Rebecca Bartlett (LGS) (to Everyone): 9:46 AM: Selection Lists were really problematic in Symphony.

Ann Marie Lindsey (to Everyone): 9:46 AM: Is it possible to get a look at BCA in action?

Katie Cangelosi (to Everyone): 9:46 AM: Exactly!

Katie Cangelosi (to Everyone): 9:47 AM: Thanks, sorry got in a bit late

Ann Marie Lindsey (to Everyone): 9:47 AM: I'm looking for more of a one-on-one

Ann Marie Lindsey (to Everyone): 9:48 AM: Great!

Rebecca Bartlett (LGS) (to Everyone): 9:53 AM: We're in

FY2021 if that's helpful.

Rebecca Bartlett (LGS) (to Everyone): 9:56 AM: So what needs to be done with these orders on the list?

Kelli Staley (to Everyone): 9:58 AM: How do we correct paid, but not received?

Rebecca Bartlett (LGS) (to Everyone): 10:00 AM: Yes, thanks!

Kelli Staley (to Everyone): 10:00 AM: thanks Vicki!

Ann Marie Lindsey (to Everyone): 10:00 AM: \]]]]]]\

Ann Marie Lindsey (to Everyone): 10:00 AM: That was my cat! UGH!

SWAN - Dawne Tortorella (to Everyone): 10:01 AM: feel free to unmute and talk too.

Ann Marie Lindsey (to Everyone): 10:01 AM: LOL

Rebecca Bartlett (LGS) (to Everyone): 10:06 AM: Question about invoices at rollover - how do we find invoices that are in WorkFlows but not paid?

Rebecca Bartlett (LGS) (to Everyone): 10:06 AM: I went in Display Order, by fund, but we have 52 separate funds so it takes a while.

Rebecca Bartlett (LGS) (to Everyone): 10:07 AM: Yes, I wish that in WorkFlows we could "sort" the invoices by price, so we could find the ones at \$0.

Rebecca Bartlett (LGS) (to Everyone): 10:08 AM: These would be manual invoices entered but not paid by accident

Ann Marie Lindsey (to Everyone): 10:08 AM: I kind of use a workaround within WF to find unpaid invoices. Sorry, unable

to unmute.

Ann Marie Lindsey (to Everyone): 10:09 AM: I'll definitely try this report!

Amy (WRS) (to Everyone): 10:18 AM: Can you combine the second and third one together?

Ann Marie Lindsey (to Everyone): 10:19 AM: Do these need to run in a specific order?

Amy (WRS) (to Everyone): 10:19 AM: yes

Ann Marie Lindsey (to Everyone): 10:20 AM: Great! Thank you!

Rebecca Bartlett (LGS) (to Everyone): 10:24 AM: Could you review one more time how we communicate with Baker & Taylor to rollover invoices to the new fiscal year? This has never worked for us in the 6 years we've been on SirsiDynix.

Rebecca Bartlett (LGS) (to Everyone): 10:25 AM: We email them every year with the pertinent info, it has never once worked correctly.

SWAN - Dawne Tortorella (to Everyone): 10:25 AM: Can we post a sample email on the support site?

Kelli Staley (to Everyone): 10:25 AM: We email them, no issues.

Margaret Anderson (to Everyone): 10:26 AM: I have never had a problem. I email my usual contact and tell her what the new cycle is and to change all outstanding invoices to new cycle. no problems. we do not suspend shipments.

Rebecca Bartlett (LGS) (to Everyone): 10:26 AM: We're 10 months into the current fiscal year and I'm still receiving EDI

invoices with blank lines.

Margaret Anderson (to Everyone): 10:26 AM: anything that is already in their pipeline cannot be changed.

Amy (WRS) (to Everyone): 10:28 AM: The other possible problem with Rebecca is items that are merged and orders are not transferred to new bib record

Kelli Staley (to Everyone): 10:29 AM: Our FY is May 1-April 30, and we B&T EDI and don't have that problem Rebecca

Margaret Anderson (to Everyone): 10:47 AM: Both our BT EDI shipping and VAS charges show on the invoices. We do not prorate.

Ann Marie Lindsey (to Everyone): 10:47 AM: We have shipping charges attached to a Shipping fund within acq. Therefore, no prorate needed.

Amy (WRS) (to Everyone): 10:47 AM: We do but have to do it manually

Erica Sanchez (to Everyone): 10:50 AM: We manually have to update it

Margaret Anderson (to Everyone): 10:51 AM: Both charges come in on the EDI invoice. Since we charge shipping to a different fund than VAS, I have to modify the fund for shipping. But both charges are there charged to the same fund originally.

Margaret Anderson (to Everyone): 10:52 AM: Since VAS is much larger than shipping, I would like my library to charge both to my fund so both charges are charged to same fund. But no luck.

Margaret Anderson (to Everyone): 11:02 AM: I agree with last speaker about time saving.

Ann Marie Lindsey (to Everyone): 11:02 AM: The accounting. It shows what hasn't come in and what you've spent with each shipment. This is great for the selectors to see what has been paid from each fund.

Ann Marie Lindsey (to Everyone): 11:03 AM: What is VAS?

Lucas McKeever (to Everyone): 11:03 AM: its B&T's version of processing

Samantha Dietel - SWAN (to Everyone): 11:03 AM: Yes, it stands for "value added service"

Ann Marie Lindsey (to Everyone): 11:04 AM: Perhaps, just creating a shipping and processing fund. Then, the money doesn't need to be prorated within each fund.

Ann Marie Lindsey (to Everyone): 11:05 AM: It's a workaround, but would save time. Just an idea.

Lucas McKeever (to Everyone): 11:07 AM: Thank you!!

Rebecca Bartlett (LGS) (to Everyone): 11:07 AM: Thanks, everyone!

Katie Cangelosi (to Everyone): 11:07 AM: Thank you!