Preparing for Evergreen Acquisitions

EDI

This document covers questions you may have and steps you should take prior to your first training session. For example, the tables contained in this document can be filled out, and we can use them to help with setup when we come out for training. Once everything is setup, here is what an EDI - funds tracking acquisitions workflow may look like:

- Create, (but **not** submit), orders on the vendor's site.
- Download order records.
- Import into Evergreen.
- Create a Purchase Order to mark funds encumbered and send order to EDI vendor.
- Wait for EDI message and invoice.
- Mark the items received and close invoice, marking funds spent.

> Keep in mind that the Acquisitions module is quite flexible, and if a fund code, provider, etc is missed, it can easily be added in the future. If you are unsure how you want to track something, you can always start out simple and add more as time goes on. Feel free to fill out as many or as few of the tables provided in this worksheet.

On that note, you may find filling in these tables useful as you translate your ordering workflow into Evergreen. The more information entered, the more specific the training we'll be able to provide. Once filled out, the information can be emailed to [email address], or you can have a copy ready for us when we come out for training.

Aside from funding sources and funds on pages 2 and 3, which we believe should be the library's responsibility to enter, we'll be able to help with the Evergreen side of setup using the tables in the rest of the document, and we'll be able to use the data to troubleshoot future problems.

> **NOTE:** If your library plans on using EDI without tracking funds, you do not have to worry about pages 2 and 3.

Ask yourself…

…what are your funding sources?

Funding sources are used to track the specific accounts used by the accounting department of your organization. At least one funding source is required per fiscal year. Funding sources are usually used to house a budget for all or part of your library, which can then divided out more specifically to funds. It can be common for a library to use one general funding source, such as **Library Budget FY18**. If you have more sources you'd like to track, you can use this table to add them all.

Funding Source	Amount
Example: Donations FY18	$8,000
Total:	

…how do you want to track funds?

Fund codes are the bread and butter of Acquisitions for libraries wishing to track funds. They can be tracked through C/W MARS' statistics dashboard where they are updated automatically as funds are encumbered and spent. Funds can be as broad or as specific as you want. When deciding on fund names, pay special attention to the **Code** column. This should be a shortname version of the code you can easily recognize as you'll be entering them on the vendors' websites.

Code	Fund Name	Amount	Funding Source(s)
Example: yanfic	Young Adult Non-Fiction	$2,000	Donations, City Budget
	Total:		

…from whom will you be ordering materials?

Providers are any materials vendor that the library will use to purchase items. Examples include Ingram, Midwest, and Baker & Taylor, (note that these three vendors are the only ones set up for EDI). All libraries wishing to use Acquisitions must have at least one provider, but there is no upper limit. For every EDI account, you will need one provider. If you plan on entering invoices into Acquisitions, you may want at least one provider for every other vendor as well, such as Amazon, as providers collect every invoice received against them, letting use easily see all attached invoices.

The **Code** column should be used to create a recognizable short name of the provider. This code will be used when uploading order records, creating purchase orders, and receiving invoices.

Provider (Vendor)	Code	EDI?
Example: Baker and Taylor Entertainment	bte	Y

…which staff members will be using Acquisitions at your library?

Staff wishing to use the Acquisitions module will need one of two permissions. Please read the following descriptions and fill out the table with staff who will need access to module and the set of permissions they will require. Before training begins, at least one staff member will need **Acquisitions Administrator** permissions.

Acquisitions Clerk

This permission contains the ability to create and update purchase orders, invoices, edit copy/volume records, and upload MARC order files. It does not allow staff to manage funds, providers or EDI accounts.

Acquisitions Administrator

This permission group grants the following abilities, (for records linked to your library). Libraries who are full OCLC members will be allowed to import MARC records from OCLC via the z39.50 connection.

- add, update, and delete funds, providers, and EDI accounts
- configure acquisitions for their library
- add, update, and delete copies, volumes, and MARC records
- also includes the permission of circulation manager and cataloger

Staff Name	Login	Current Perm	New Perm
Example: Alphonse Cwtest	acwtest	Cataloger	Acq Admin

NOTE: If you'd like the staff in the table to have their permissions prior to training, the information in it can be sent to [email address] by your library's director or coordinator. We will update the staff

> member's permissions and make sure they will still be able to perform the necessary functions of their previous group.

…how do you want your on-order items to show in the catalog?

By default, when on-order items are uploaded to the catalog, the barcode and Call Number show as **ACQ** followed by an auto-generated number. For example, an item's barcode and Call Number may show **ACQ12345**. It is possible to have these prefixes changed to something else. Some libraries, for example, have it show as **ONORDER** followed by a number for barcodes and **ON ORDER** followed by a number for Call Numbers. If you'd like a specific prefix to accompany your on-order items, you can fill out this table.

Barcode Prefix	Call Number Prefix

…which staff members should be added to the acquisitions mailing list?

C/W MARS provides an acquisitions mailing list, [email list]. We recommend at least one staff member be added. [email list] is a friendly list on which staff members can voice concerns, ask questions, and talk about everything acquisitions related. For example, it can be useful if you want to know another library's workflow when ordering from Amazon or how they spread funds among their branches. We also use it to send out important acquisitions updates from C/W MARS.

If any of your staff want to be added to the [email list], please provide their names and email addresses.

Staff Member Name	Email Address

Vendor Side Setup

Baker & Taylor, Ingram, and Midwest

C/W MARS does not have access to the vendor side of Acquisitions. To begin using Evergreen Acquisitions, you will have to work with your vendors to set up your grids/profiles and get the information necessary for C/W MARS to set up EDI ordering in Evergreen.

When items are uploaded into Evergreen, they bring with them item attributes such as estimated price, copy location, circ modifier, and fund code. For this information to come through correctly, these attributes must be set up on the vendor's site. The setup and application of these attributes is sometimes called grids or profiles by the vendor.

Baker & Taylor and Ingram allow setup of profiles/grids by libraries. Midwest requires the information sent to them. More information and vendor specific procedures can be found by contacting the vendor. Since this is required before items are uploaded into Evergreen, it is recommended that vendor side setup begin prior to training.

MARC subfield 598a

C/W MARS requires that the **598a** field be added to your grids/profiles. This field will house your library's **two letter code**. Libraries who are the first to upload a record into the system are in charge of requesting its overlay. This two letter code lets you know if you were the first to upload the record.

Your library's two letter code was included in the email on which this document came attached.

MARC field 962 - Holding Subfields

The majority of item attributes are brought through the **962** field. It's very important that when setting up grids/profiles, the the **962** field is used. Within the 962 field, subfields will correspond to specific item attributes. Although the subfield letters can be whatever you want, we have default choices that we recommend using. This table covers each subfield, whether it's required, its default subfield letter, and columns if you want a different letter for certain vendors.

> **NOTE:** if you've chosen to go with different letters, please let us know prior to training. These subfields are directly attached to providers and mismatches can cause errors when trying to upload the records.

Attribute	Required?	Rec. subfield	BT subfield*	Ingram subfield*	Midwest subfield*
Note	Not required	a			
Owning_lib**	**Required**	b			
Quantity	**Recommended**	c			
Barcode	Not Required	d			
Estimated Price	**Recommended**	e			
Fund_code	**Required**	f			
Copy_location	**Required**	l			
Circ_modifier	**Required**	m			
Call_number	Not required	n			
Purchase_order	Not Required	o			

Once you have the subfields set up with the vendors, you will have to enter in the **owning_lib, copy locations**, **circ modifiers**, (and fund codes***), you will be using with the vendor. To help with this process, a list of your library's copy locations and C/W MARS' circ modifiers were included in the email on which this document was attached.

IMPORTANT: These attributes MUST match case and spelling in Evergreen exactly. If you have a copy location called **Adult Nonfiction**, and you enter **adult nonfiction** on the vendor side, Evergreen will not be able to find the correct location. When adding circ modifiers, you only need to enter it how it first appears in the modifier string. For example, do NOT enter Audio : Audio : audio, simply enter **Audio**. The provided Excel file will have the modifiers and locations as they should be entered.

HINT: Because each location has to be entered manually, some libraries have generic locations such as **Adult** that they use, and when the item actually arrives, the location can be updated to something more specific. Remember, for this to work, you must have an Evergreen location with the name.

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*Enter only if subfield is different than recommended subfield, (third column).
**Owning_lib is your library's Evergreen Shortname. This information was in the email on which this document was attached.
***Fund codes will have to be entered after you've added them to Evergreen. Prior to training, concentrate on adding locations and modifiers.

Setting up EDI

To set up EDI, vendors will need to supply you with some information. Keep in mind that while some vendors allow one EDI account to be used for all kinds of purchasing, others may require an EDI account for each kind of order, i.e. Book vs Audiovisual. The information needed from your vendor includes **Host, Username, Password, Account, Path, Incoming Directory, and Vendor Account Number** and/or **Assigned Code**, (note that some vendors may or may not have an assigned code). This data will be used by C/W MARS to help set up the Evergreen side of EDI. Please fill out the following tables with this information and the provider code to which it will be attached.

Provider	Host	Username	Password	Account
Ex: bte	ftp.baker-taylor.com	31234X	31234X	L012365

Provider	Path	Incoming Directory	Vendor Account #	Assigned Code
Ex: bte	31234X.In/*.INT	31234X.Out	L012365	1001