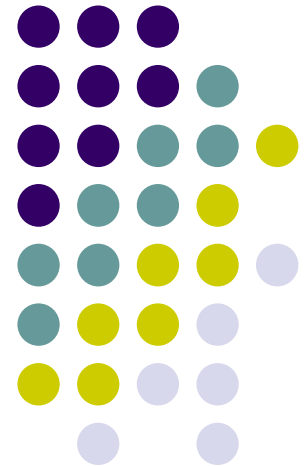


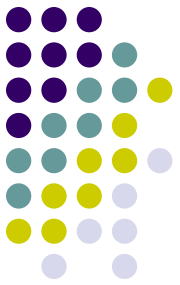
Setting up Voyager for EDI and PromptCat

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Coordinator of Library Processing

Cofrin Library, UW-Green Bay





We wanted:

- One vendor account in Voyager for Blackwell so that we could most easily track the money
- The ability for PromptCat to differentiate among locations in the library

Ways to get what we wanted:



- Use fund codes to differentiate among different locations, but ...
 - Our fund codes are very, very, very detailed
- Use subaccounts beneath the Blackwell umbrella
 - We could get away with six main locations

So we set up subaccounts ...



- Work with Blackwell to set up the naming convention for the subaccounts
- Keep it simple and memorable (ours link to our Blackwell account designation and our long-defined alphabetic OCLC locations, e.g. CUWG-W (Stacks), CUWG-X (Reference))
- Blackwell assigned the subaccount numbers



Order, order ...

- It's important to set up the items in order
- Some of the values we needed to select weren't initially available to us because I set things up "out of order"
- Vendor subaccounts ► EDI connection profiles ► Bulk import rules
- Documentation from Blackwell will get you through the basics for each of these

- Line Items
- Orders
- Invoices
- Ledgers and Funds
- Vendors
- New Vendor
- Search Vendors
- EDI Connection Profile
- Search EDI Connection Profiles
- Check-In
- Order Maintenance
- EDI

Search Vendors

Vendor - BBS

File Vendor Tools Help

Save Save and Close Save and New

Vendor Code: BBS Vendor Name: Blackwell's Book Services

Vendor Type: Domestic Books Federal Tax ID: 93-0638303

Currency: USD Institution ID:

Addresses/Phones **Accounts** Delivery Options Bank Information Notes Performance Properties

Account Number	Account Name	PO Type	Deposit	Discount %	Status	Notes
106930001-01	Blackwell's Book Service	Firm Order	No	0	open	
10695502	CJW/G-D (Index Area)	Firm Order	No	0	open	
10695503	CJW/G-E (SPC)	Firm Order	No	0	open	
10695504	CJW/G-H (IMC)	Firm Order	No	0	open	
10695505	CJW/G-W (Stacks)	Firm Order	No	0	open	
10695506	CJW/G-X (Reference)	Firm Order	No	0	open	
10695501	CJW/G-C (Atlas)	Firm Order	No	0	open	

New... Edit...

Account #'s assigned by Blackwell – Account names agreed to with Blackwell

1 records. 100% of records displayed.

Set up EDI connection profiles



- You will need a separate profile for each subaccount/location
- Blackwell will provide the SANs (electronic address information) that you need
- There will be separate SANs for each subaccount/location

Search EDI Connection Profiles

Search By: Vendor Code

Equal

Greater

Less

Search For: bbs

Search

Next

Clear

Vendor	Vendor Envelope Address	Location	Location Envelope Address	Usage
Blackwell's Book Ser	1697048:	reference - atlas	3180158 0001:ZZ	PO,IV
Blackwell's Book Ser	1697048:	reference - index	3180158 0002:ZZ	PO,IV
Blackwell's Book Ser	1697048:	special collections	3180158 0003:ZZ	PO,IV
Blackwell's Book Ser	1697048:	imc	3180158 0004:ZZ	PO,IV
Blackwell's Book Ser	1697048:	stacks	3180158 0005:ZZ	PO,IV
Blackwell's Book Ser	1697048:	reference	3180158 0006:ZZ	PO,IV
Blackwell's Book Ser	1697048:	Any Location	3180158:ZZ	PO,IV

The vendor envelope address is Blackwell's SAN

The location envelope addresses designate our various locations and link to the subaccounts we set up

7 records.
100% of records displayed.

Edit

Line Items
Orders
Invoices
Ledgers and Funds
Vendors

Search EDI Connection Profiles

Search By: Vendor Code

Equal

Greater

Less

Search For:

bbs

Search

Next

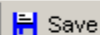
Clear

Vendor	Vendor Envelope Address	Location	Location Envelope Address	Usage
Blackwell's Book Ser	1697048:	reference - atlas	3180158 0001:ZZ	PO,IV

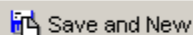
Blackwell's Book
Blackwell's Book
Blackwell's Book
Blackwell's Book
Blackwell's Book
Blackwell's Book
Blackwell's Book

Edit EDI Connection Profile

File Tools Help



Save and Close



Library

Location: reference - atlas

Envelope Address: 3180158 0001:ZZ

 Use Vendor Account Number

Inside Address: 3180158 0001:ZZ

Vendor

Vendor Code: BBS

Envelope Address: 1697048:

Inside Address: 1697048

Usage:

 PO: Purchase Order SC: Serial Claim IV: Invoice/credit memo SR: Serial claim response XM (Apply to Incoming Messages that fail to match any profile for the selected Location)

Note the matches
among locations
and SANs (location
and address boxes)

Be sure to check correct
usage boxes

Check-In
Order Maintenance
EDI

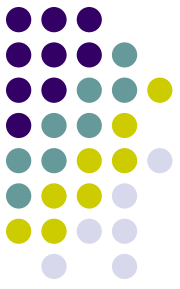
7 records.
100% of records displayed.

Edit



Set up bulk import rules

- You will need a different bulk import rule for each subaccount/location
- The bulk import rule implants necessary routing information in the purchase order so that Blackwell sends the file off to PromptCat with the correct subaccount/location information



Bulk import settings

- Crucial set-up values are entered under the “Orders” button
- “Order Location” at the top of the screen
- “Vendor Account” setting at the center top of the screen
- Each of these settings must match the subaccount/location for the file of records you will be importing

- Acquisitions
- Call Slips
- Cataloging
- Authority Duplicate Detection Profiles
- Bibliographic Duplicate Detectio...
- Bulk Import Rules
- Call Number Hierarchy
- Policy Definitions
- Circulation
- OPAC Configuration
- Search
- Security
- System

Cataloging - Bulk Import Rules

Codes	Names
BBSatlas	Blackwell - Atlas
BBSimc	Blackwell - IMC
BBSindex	Blackwell - Index Area
BBSref	Blackwell - Reference
BBSspc	Blackwell - SPC

All the bulk import rules in a row ...

New

Edit

Delete

Edit Bulk Import Rule:

- Rule Name
- Rules
- Item Type
- Mapping
- Barcode

Code: BBSref

Name: Blackwell - Reference

Orders...

Essential information for correct EDI function is entered under "Orders"

Save

Cancel

Cataloging Bulk Import Order Settings

Order Location:

reference

Must match the intended location

Order Type:

Firm Order

Line Item Type

Field: 960

Subfield: a

Ind 1:

Ind 2:

Default:

Single-part

Vendor

Code:

BBS

Acct:

CUWG-X

This one must, too

Currency:

USD

Fund

Field: 960

Subfield: u

Ind 1:

Ind 2:

Default Code:

BA GEN

Price

Field: 960

Subfield: s

Ind 1:

Ind 2:

Default:

\$0.00

Copy

Field: 960

Subfield: o

Ind 1:

Ind 2:

Default:

1

Notes

Field: 961

Subfield: d

Ind 1:

Ind 2:

Instructions

Field: 961

Subfield: h

Ind 1:

Ind 2:

Vendor Title

Field: 024

Subfield: a

Ind 1: *

Ind 2: *

Piece Id

Field:

Subfield:

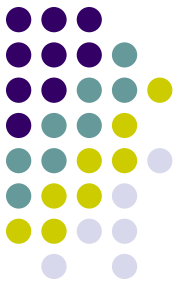
Ind 1:

Ind 2:

OK

Cancel

You know you've got it right when ...



- The “Order Site” and “Ship to” and “Bill to” locations on the Blackwell purchase order created at bulk import matches the location for that order file
- The SANs in the addresses on the “Process EDI messages” and the popup “Send Selected Messages” box match the EDI profiles for the locations you want for your record file

Order Number: 5999
 Type: Firm Order
 Site: reference

Vendor Code: BBS
 Account:

Status Date: 10/1/2007

2 Line Items on Order

Locations Ship To: reference
 Bill To: reference

Amounts Line Item Subtotal: \$782.00
 Other Charges: \$0.00
 Total Order Amount: \$782.00
 Currency Code: USD
 Rate: 1

PO as created by bulk import; note that Order Site and Ship to/Bill to locations all match the desired location

Line #/Status	Title	Price (Adjustments)	# of Copies	Location	Fund	Line Total	Line Item Type	Notes
/ Approved	Columbia Granger's index b	\$307.00	1	uwgb	07-08 CL / RPN-LTH	\$307.00	Single Part	C2#VM074882
/ Approved	Early childhood education :	\$475.00	1	uwgb	07-08 CL / RL -EDU	\$475.00	Single Part	C2#VM106857



- Line Items
- Orders
- Invoices
- Ledgers and Funds
- Vendors
- Check-In
- Order Maintenance
- EDI



Process EDI Messages

Process EDI Messages

Incoming | Outgoing

Search By	Condition	Search For	Operator
→ Vendor Code	equal	bbs	

Find Clear

Often used search criterion list:

Location	Vendor Name	Profile	Message Number	Message Type	Message Status	Send Date	Line Items	Amount	File Name
stacks	Blackwell's Book Ser	yes	5998	Purchase order	written to file for sending	10/1/2007	9	0	EPI01.CUwG-W.
reference	Blackwell's Book Ser	yes	5999	Purchase order	written to file for sending	10/1/2007	2	0	EPI01.CUwG-X.D
reference	Blackwell's Book Ser	yes	5999	Purchase order	new message		2	0	

Unselect Select All For: Blackwell's Book Ser (from: 3180158 0006:ZZ to: 1697048:) Send... Delete

The SAN in this address should match the address set up for this location in the EDI profiles



Send selected messages

To File : EPI01.CUWG-X.D071004.R2

To Agent :

OK

Cancel

Vendor Code : BBS

Vendor Name : Blackwell's Book Ser

Sender Code : 3180158 0006:ZZ

Receiver Code : 1697048:

And the SAN in the Sender Code box should also match the SAN set up in the EDI profile for the desired location

A final change in SysAdmin settings ...



- Our serials librarian found she could not check in (or even look at the history) for some locations
- Needed to change a setting to allow the Acquisitions/Serials module to receive items in the locations we had set up for EDI

- Acquisitions
- Fiscal Periods
- Fund Types
- Mark Reasons
- PO Types
- Policy Definitions
- Call Slips
- Cataloging
- Circulation
- OPAC Configuration
- Search
- Security
- System

Acquisitions - Policy Definitions

Names
Acquisitions/Serials

New

Edit

Delete

Edit Policy Definition:

- Policy
- Locations
- Vendor Policies

- Available
- Circulation, Cofrin Libr
 - cofrin library
 - compact shelving-per
 - compact shelving-ref
 - downtown learning center
 - ecumenical center

>

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<<

- Selected
- reference - atlas (o) (r)
 - reference - index (o) (r)
 - reference (o) (r)
 - reference desk
 - remote - gvp - us
 - remote - gvp - wi

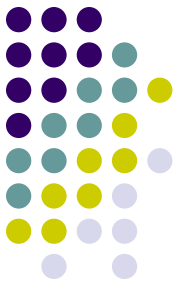
- Order/Claim/Pay Location
- OPAC Display of Temp Records
- Receive Location
- Destination Location

Order Default Item Type: Noncirc

Receive Default Item Type: Noncirc

Default Print Location: Cofrin Libr Acquisitions

These needed to be checked to allow Serials to check in issues to the EDI locations



Other things to note ...

- We had very specific things that we wanted to accomplish with our set up
- If you don't need to distinguish among locations, you can set up just one rule for everything
- Need to separate orders by locations from the outset and communicate the location information to the person who runs bulk import



Thanks to ...

- Sandy in Acquisitions who tried every new thing we came up with
- Joan in Collection Management who harangued people so they would not give up
- Sandro, Irene, and Dan at Blackwell who did not give up
- Daryl at Ex Libris who supplied the missing information that brought everything together