Bill Erickson

Slides Available at evergreen-ils.org

http://evergreen-ils.org/dokuwiki/doku.php?id=advocacy:presentations

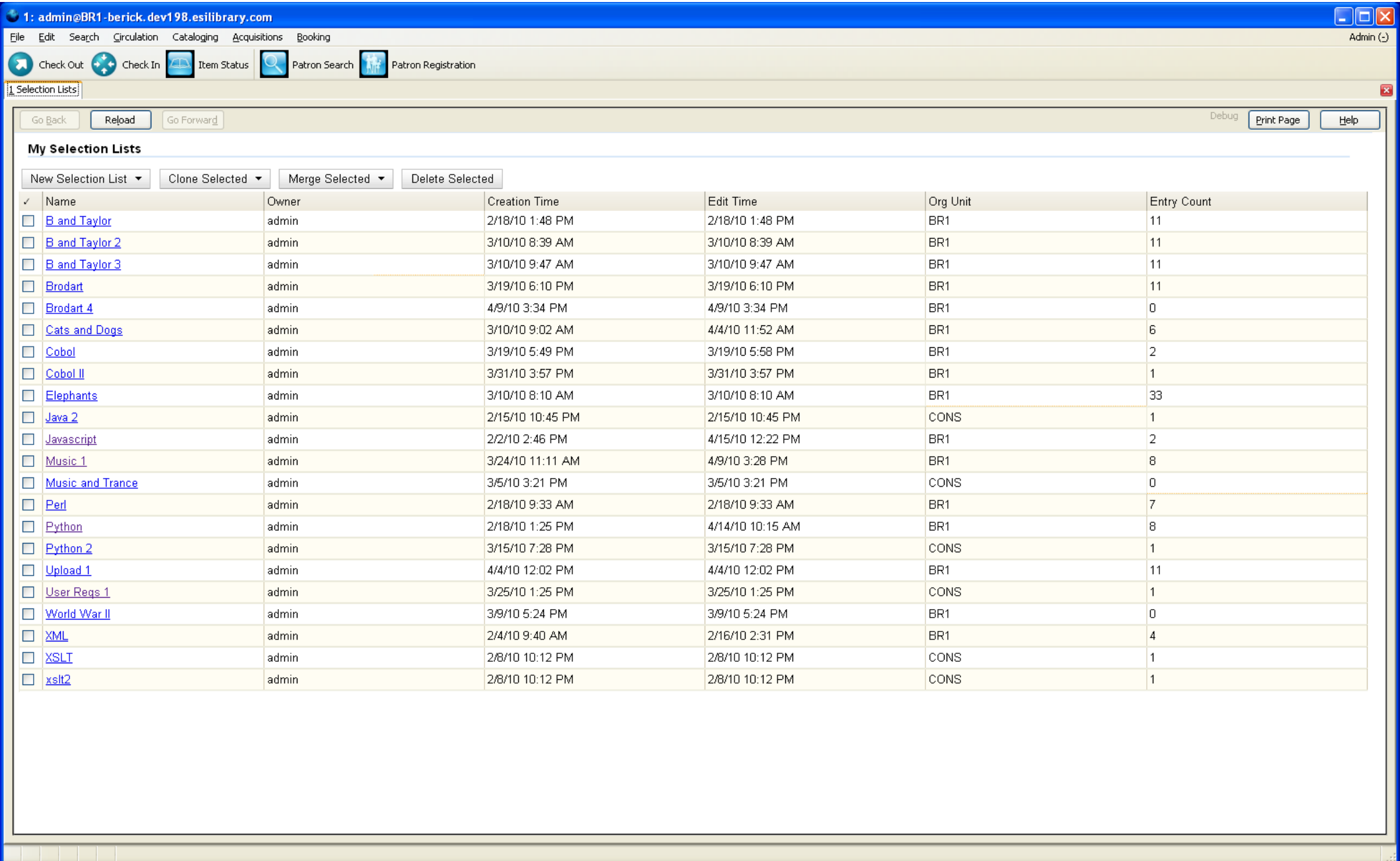
Acquisitions Roundup

- Selection
- Ordering
- Receiving & Claiming
- Cataloging
- Invoicing
- Administration
- What's Next

Selection

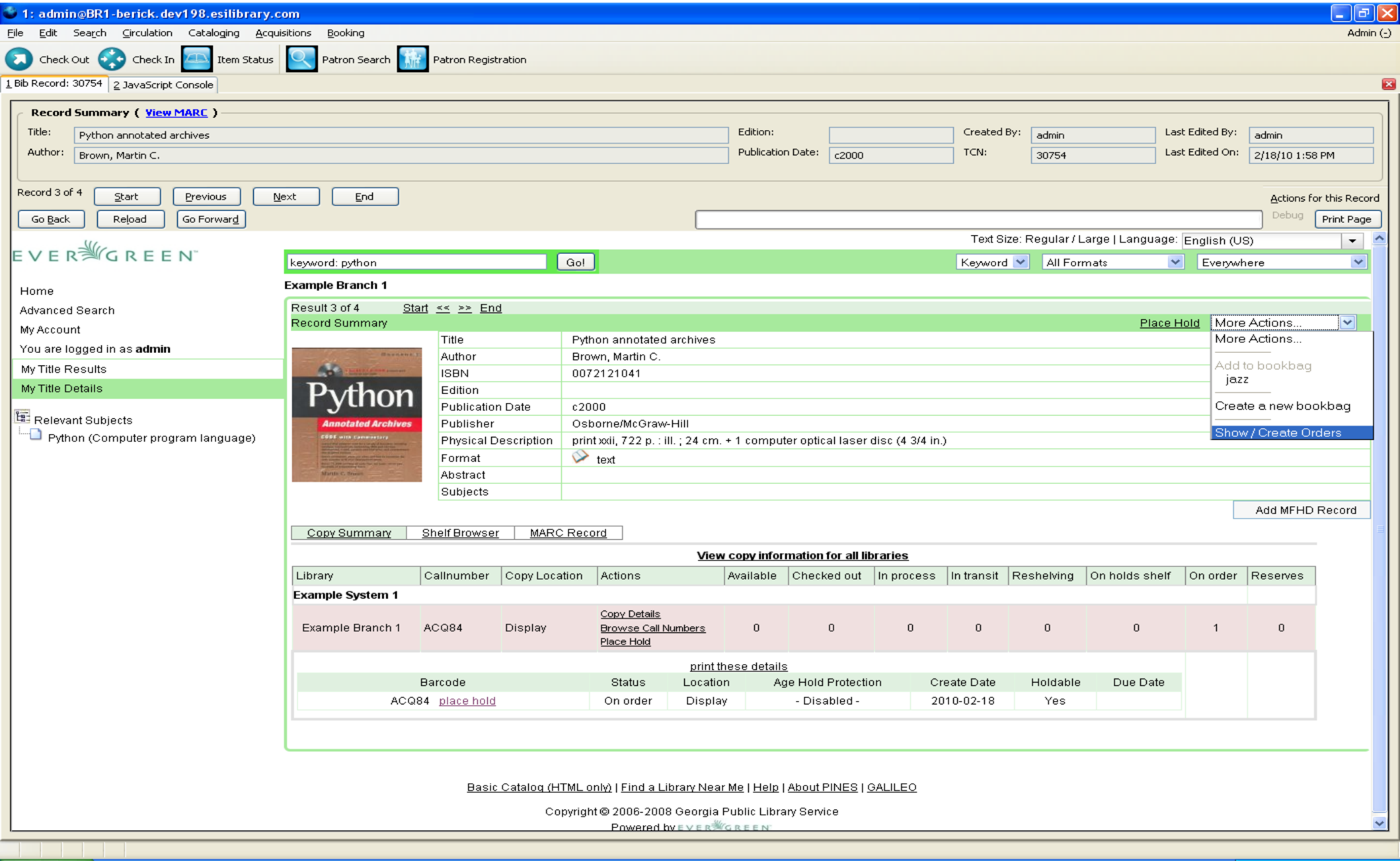
- Selection Lists
- From Catalog Records
- From Z39.50
- Lineitem Searching
- Brief Records
- Patron Request and Notifications
- Lineitem Notes & Alerts
- Related Orders

Selection Lists

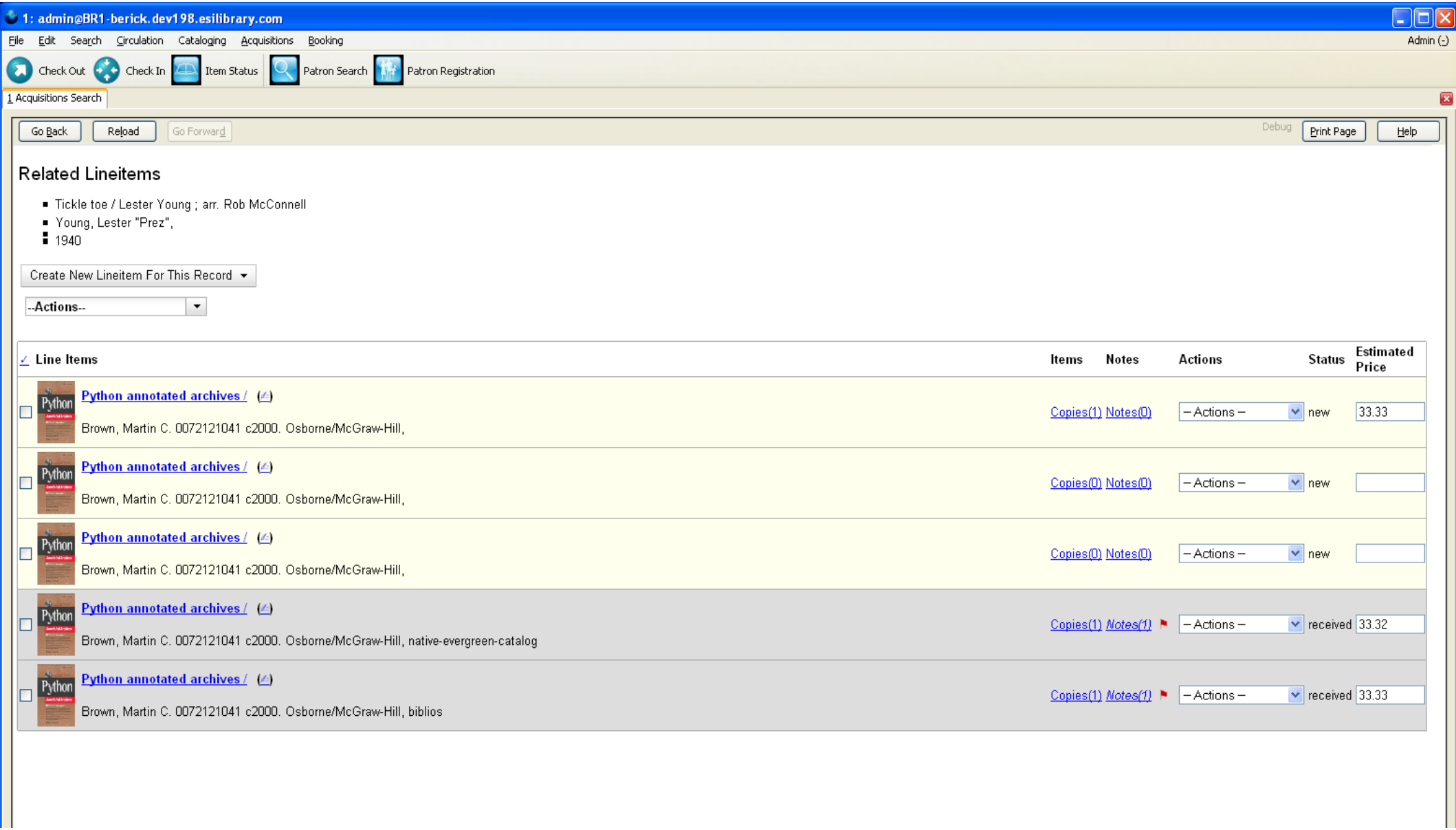


✓	Name	Owner	Creation Time	Edit Time	Org Unit	Entry Count
☐	B and Taylor	admin	2/18/10 1:48 PM	2/18/10 1:48 PM	BR1	11
☐	B and Taylor 2	admin	3/10/10 8:39 AM	3/10/10 8:39 AM	BR1	11
☐	B and Taylor 3	admin	3/10/10 9:47 AM	3/10/10 9:47 AM	BR1	11
☐	Brodart	admin	3/19/10 6:10 PM	3/19/10 6:10 PM	BR1	11
☐	Brodart 4	admin	4/9/10 3:34 PM	4/9/10 3:34 PM	BR1	0
☐	Cats and Dogs	admin	3/10/10 9:02 AM	4/4/10 11:52 AM	BR1	6
☐	Cobol	admin	3/19/10 5:49 PM	3/19/10 5:58 PM	BR1	2
☐	Cobol II	admin	3/31/10 3:57 PM	3/31/10 3:57 PM	BR1	1
☐	Elephants	admin	3/10/10 8:10 AM	3/10/10 8:10 AM	BR1	33
☐	Java 2	admin	2/15/10 10:45 PM	2/15/10 10:45 PM	CONS	1
☐	Javascript	admin	2/2/10 2:46 PM	4/15/10 12:22 PM	BR1	2
☐	Music 1	admin	3/24/10 11:11 AM	4/9/10 3:28 PM	BR1	8
☐	Music and Trance	admin	3/5/10 3:21 PM	3/5/10 3:21 PM	CONS	0
☐	Perl	admin	2/18/10 9:33 AM	2/18/10 9:33 AM	BR1	7
☐	Python	admin	2/18/10 1:25 PM	4/14/10 10:15 AM	BR1	8
☐	Python 2	admin	3/15/10 7:28 PM	3/15/10 7:28 PM	CONS	1
☐	Upload 1	admin	4/4/10 12:02 PM	4/4/10 12:02 PM	BR1	11
☐	User Regs 1	admin	3/25/10 1:25 PM	3/25/10 1:25 PM	CONS	1
☐	World War II	admin	3/9/10 5:24 PM	3/9/10 5:24 PM	BR1	0
☐	XML	admin	2/4/10 9:40 AM	2/16/10 2:31 PM	BR1	4
☐	XSLT	admin	2/8/10 10:12 PM	2/8/10 10:12 PM	CONS	1
☐	xslt2	admin	2/8/10 10:12 PM	2/8/10 10:12 PM	CONS	1

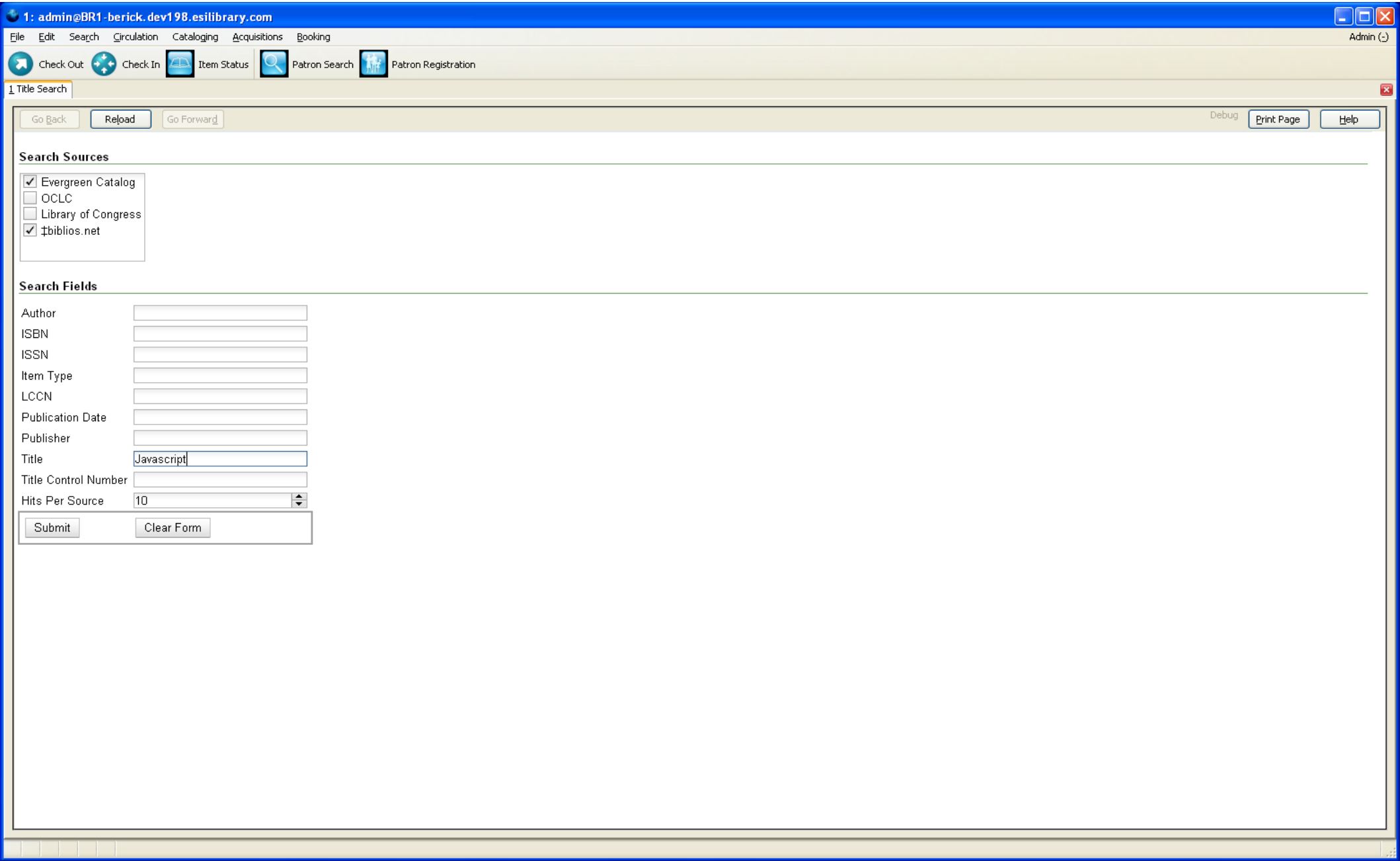
From Catalog Records



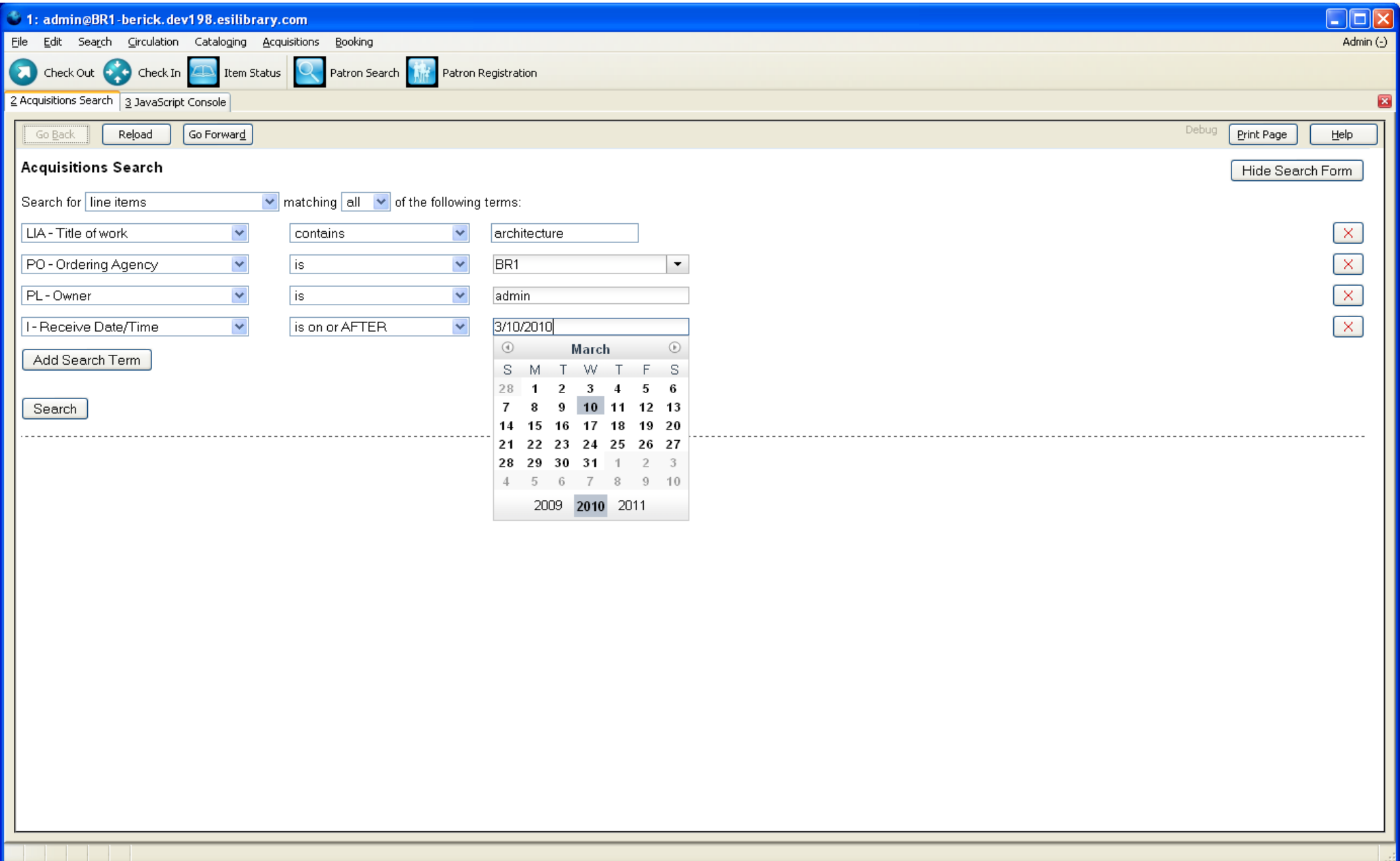
Related Orders



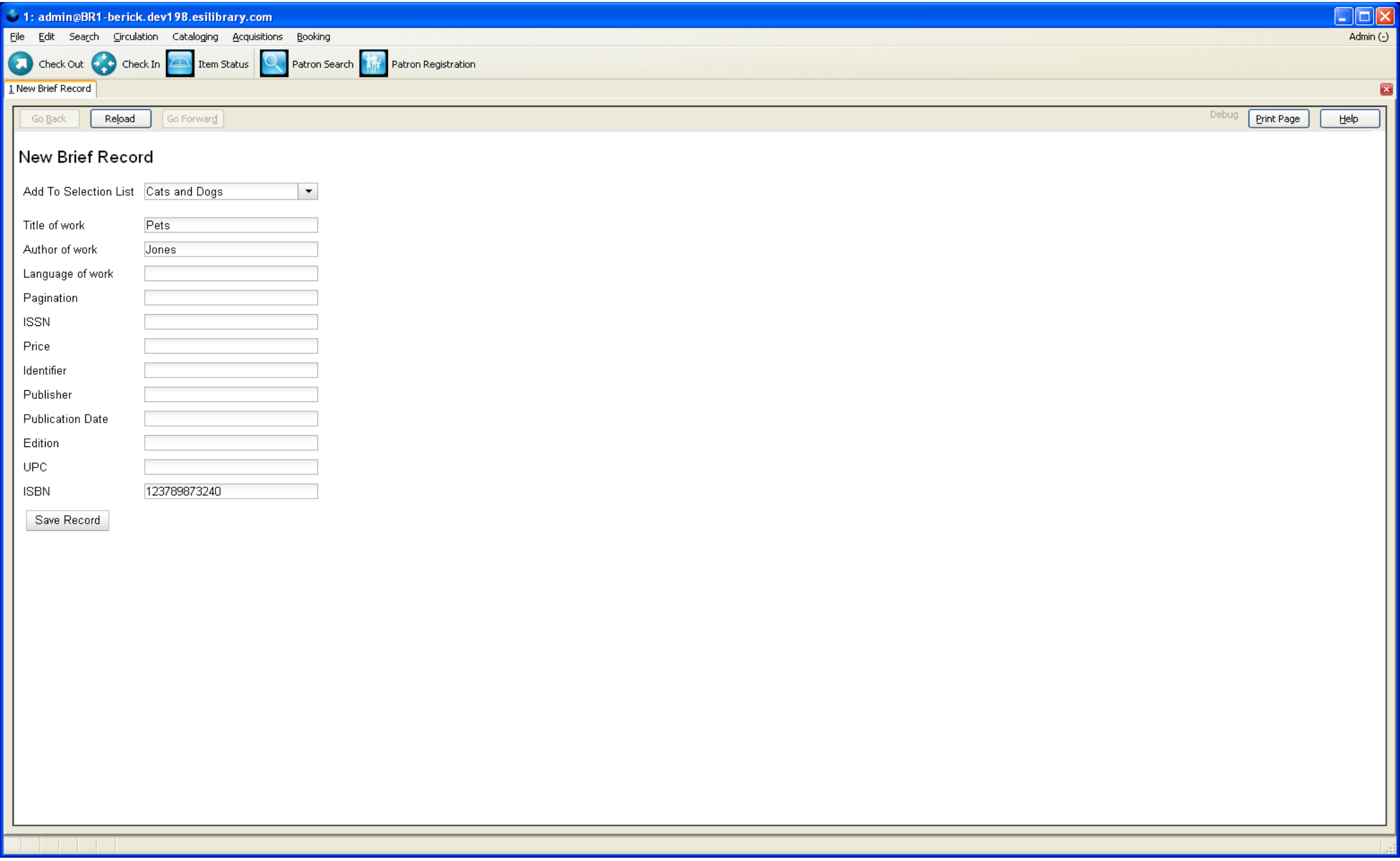
Z39.50 / Federated Search



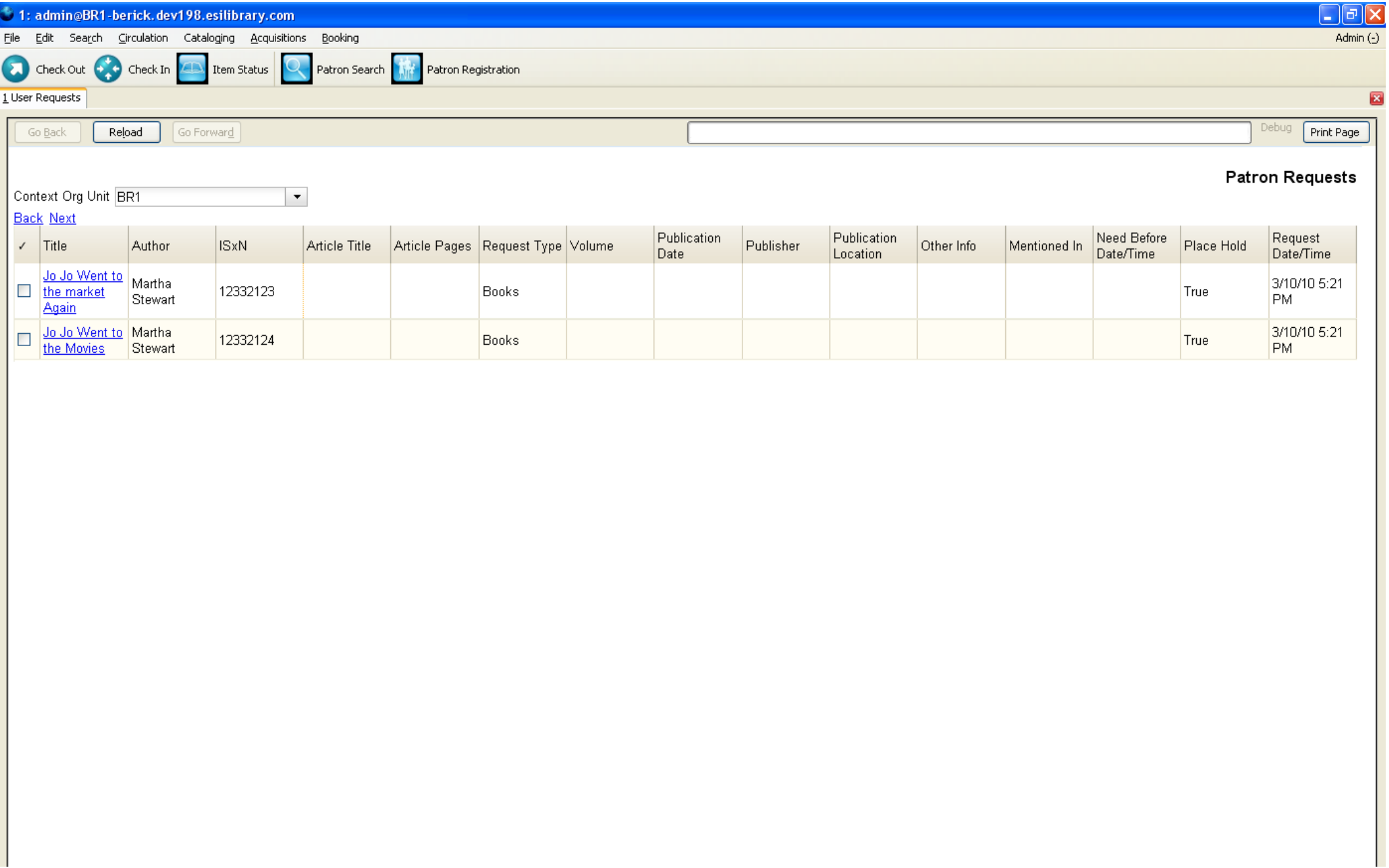
Unified Searching



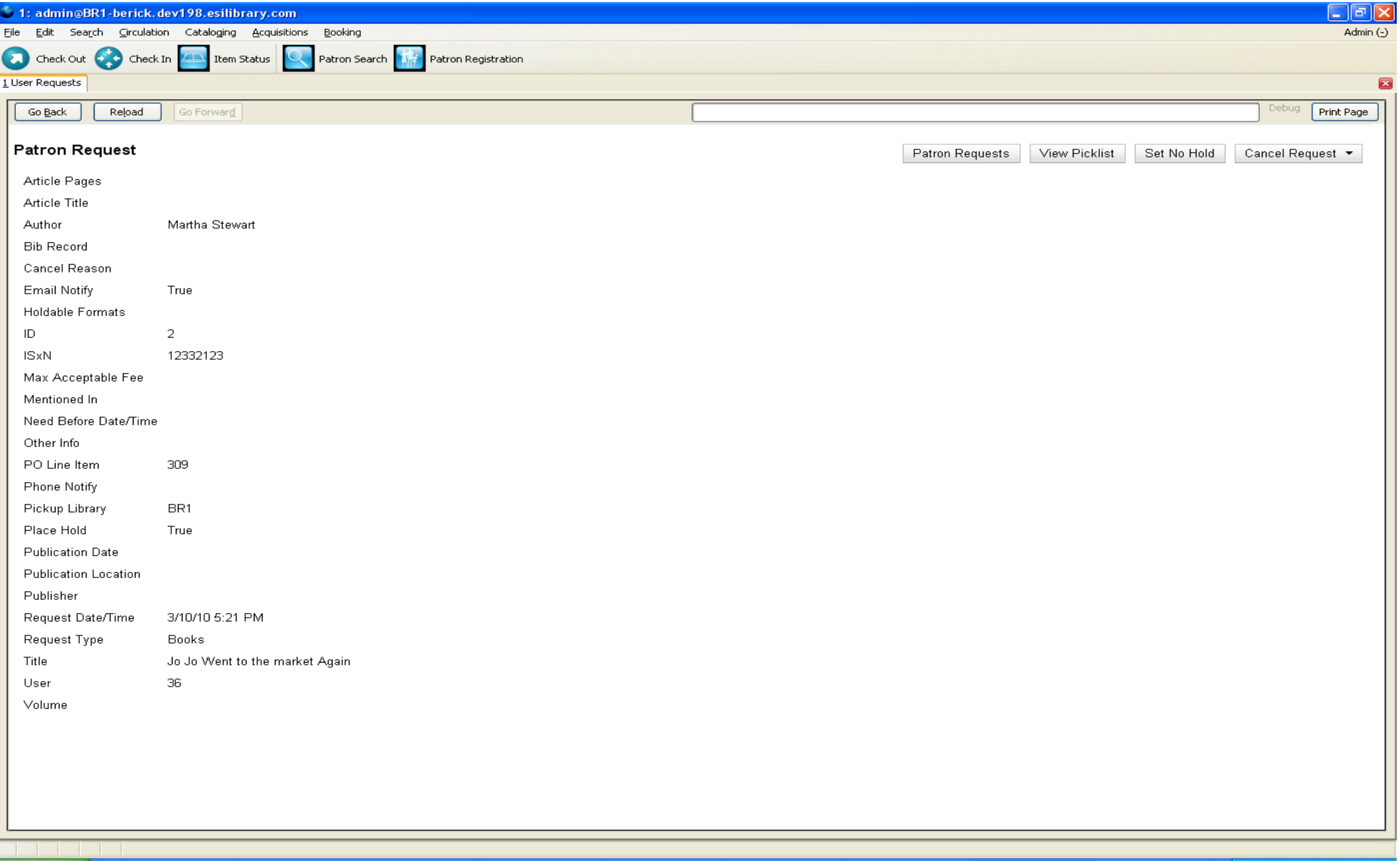
Brief Records



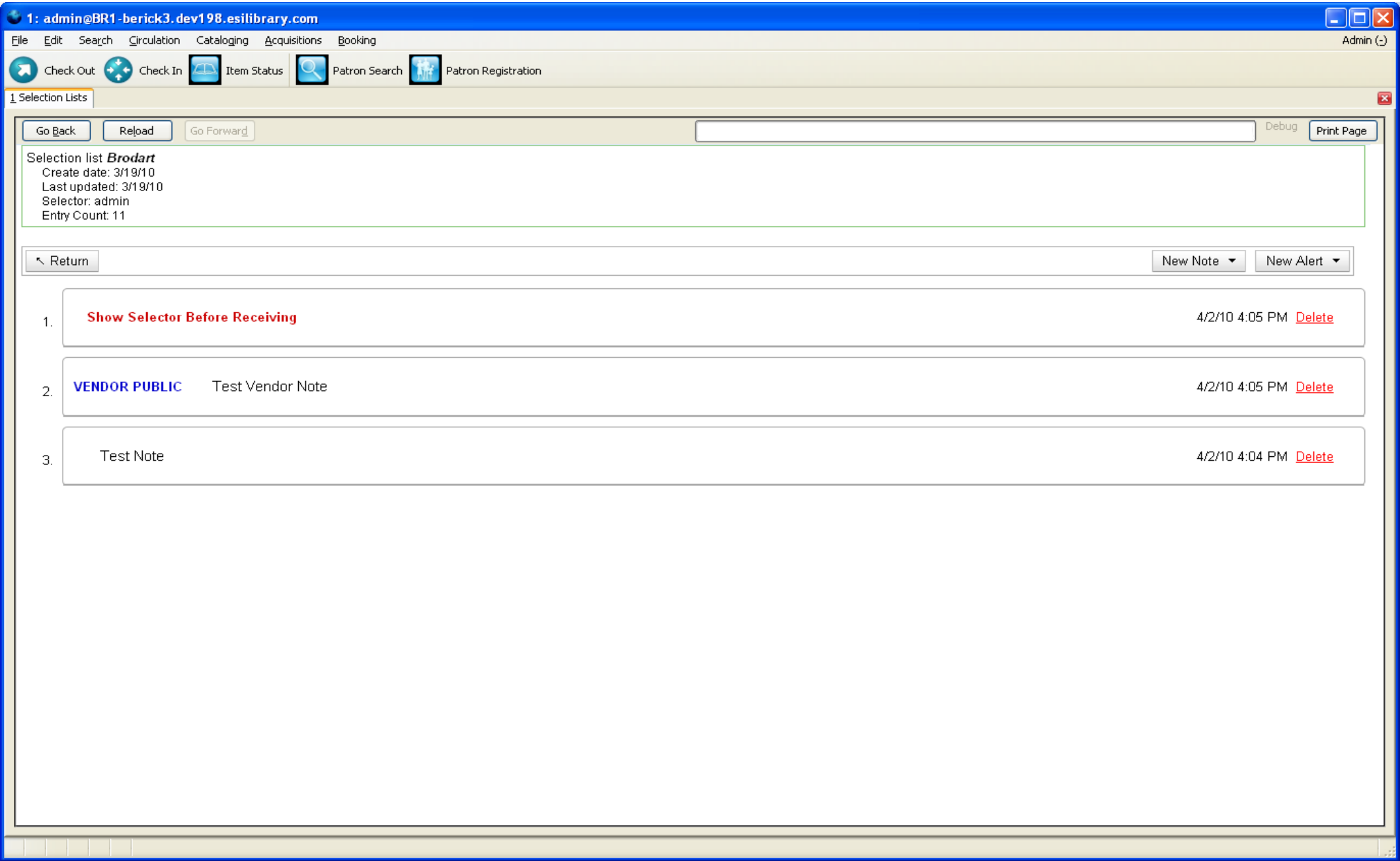
Patron Requests / Notifications



Patron Requests / Notifications



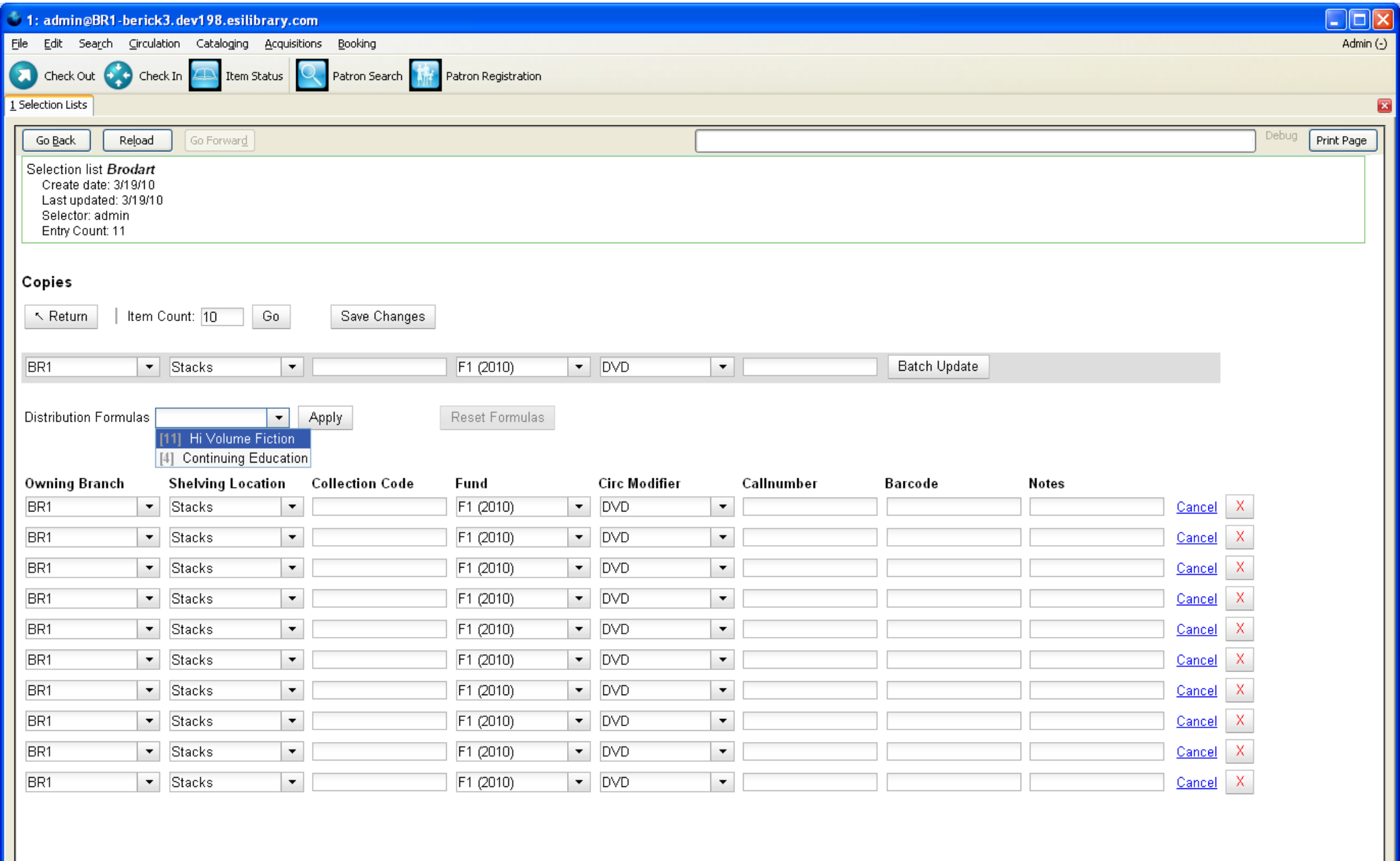
Lineitem Alerts / Note



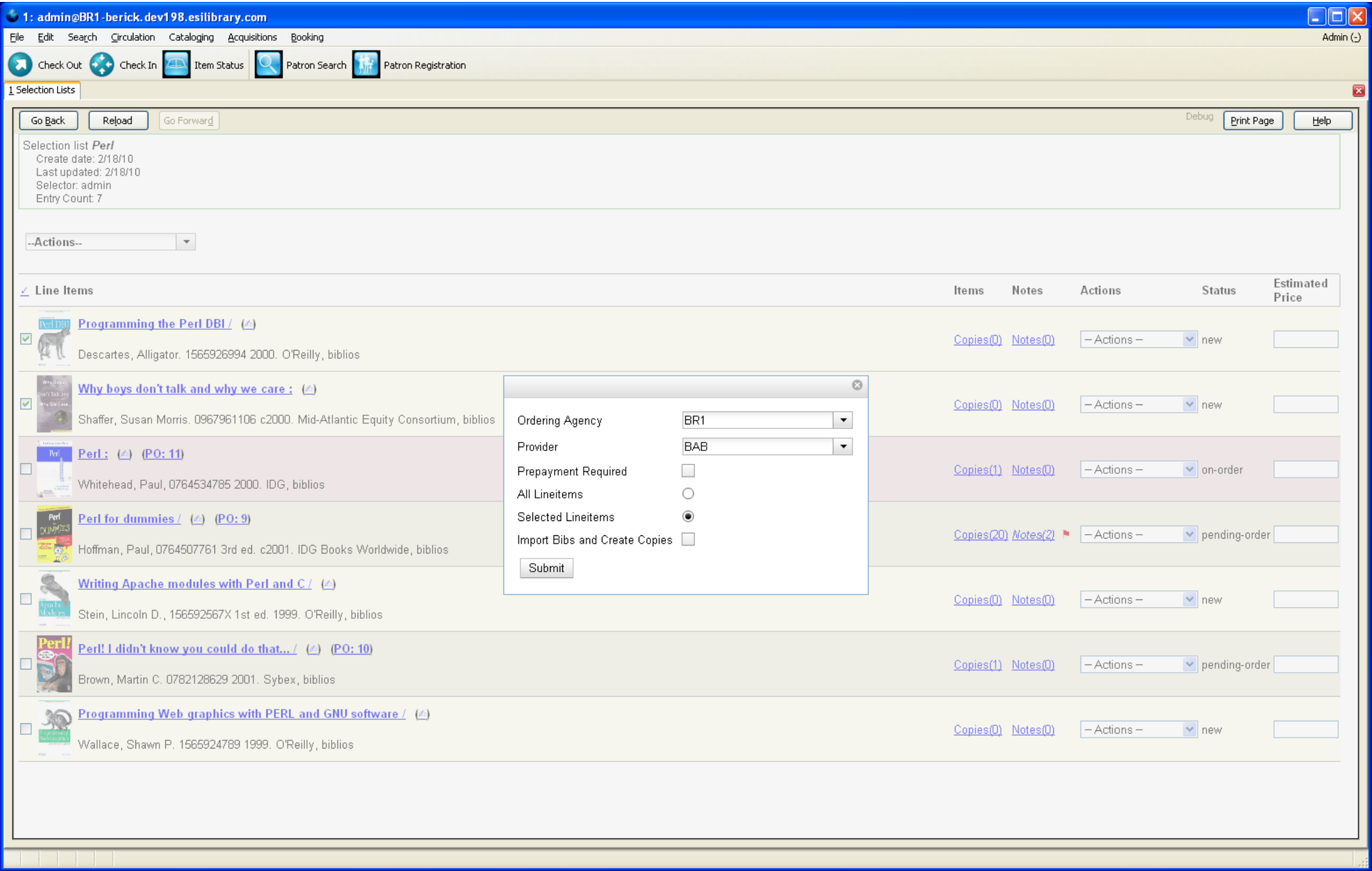
Ordering

- Adding and Editing Copies, Funds, Prices, etc.
- Creating, Activating, Printing Purchase Orders
- Importing Vendor Order Records
- EDI
- Creating Real Copies from Order Copies

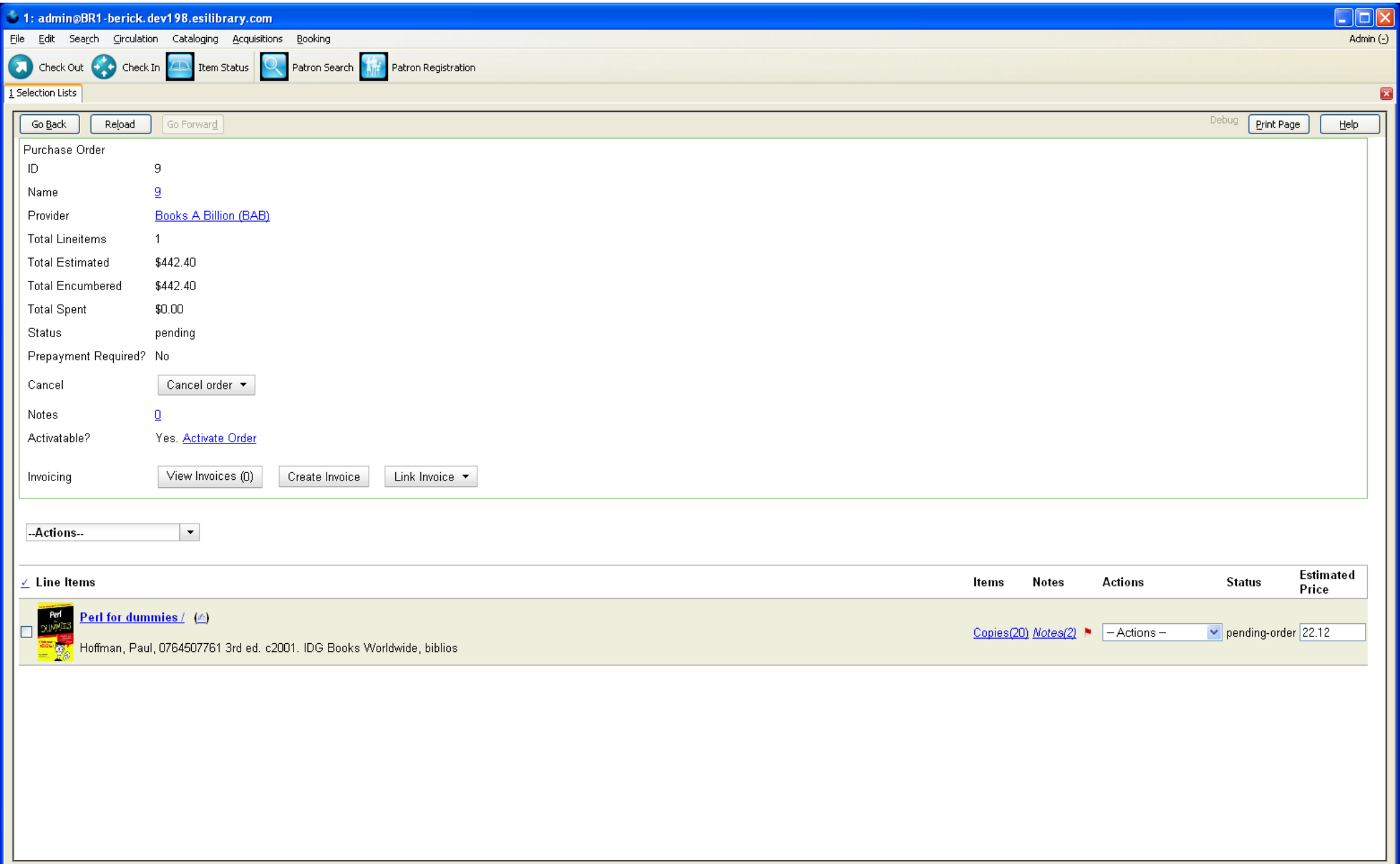
Adding / Editing Items



Purchase Orders



Purchase Orders



Purchase Orders

Purchase Order 26

date **20100404**

Vendor	Books A Billion	Ship to / Bill to	Example Branch 1 123 Main St. Anywhere GA US 30303

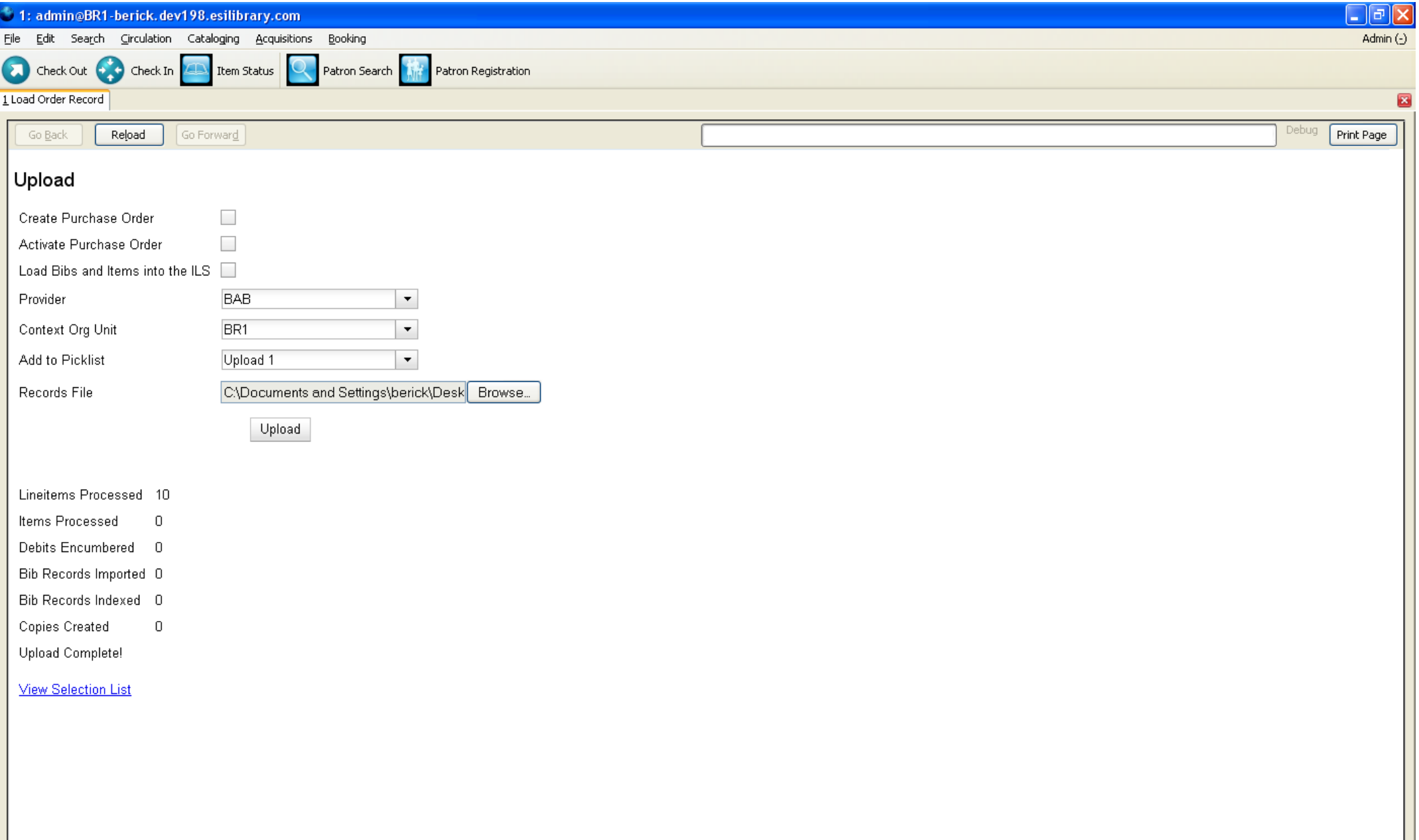
Notes to the Vendor

- Rush Order

PO#	ISBN or Item #	Title	Quantity	Unit Price	Line Total	Notes
26	03-0009879	John Cage	5	3.33	16.65	• FOO 2
26	03-0011236	Nobody's blues but mine	1	2.22	2.22	
				Sub Total	18.87	

Total Line Item Count: 2

Vendor File Upload



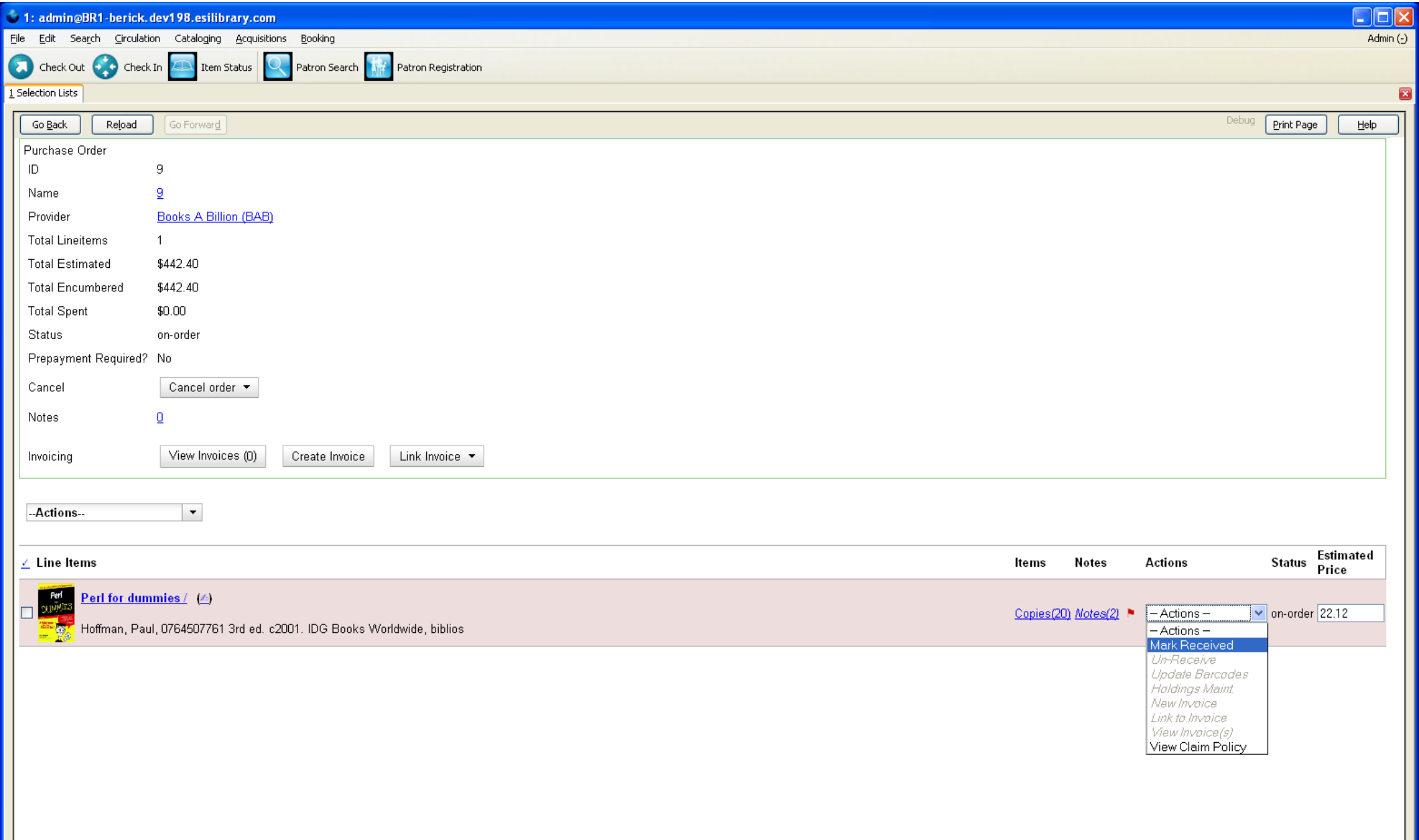
EDI: Vendors

- Testing/Communication Actively in Progress
  - Baker & Taylor
  - Ingram
  - Brodart
  - Midwest Tapes
  - Book House
  - EBSCO
- On Radar, But no Testing Yet...
  - Bound to Stay Bound, Gale Cengage, Cholastic/Grolier, Blackwell, Random House, [illegible] Books, Couts, Library Bound, S&D Books, Raincoast, BWI, Midwest Library Service

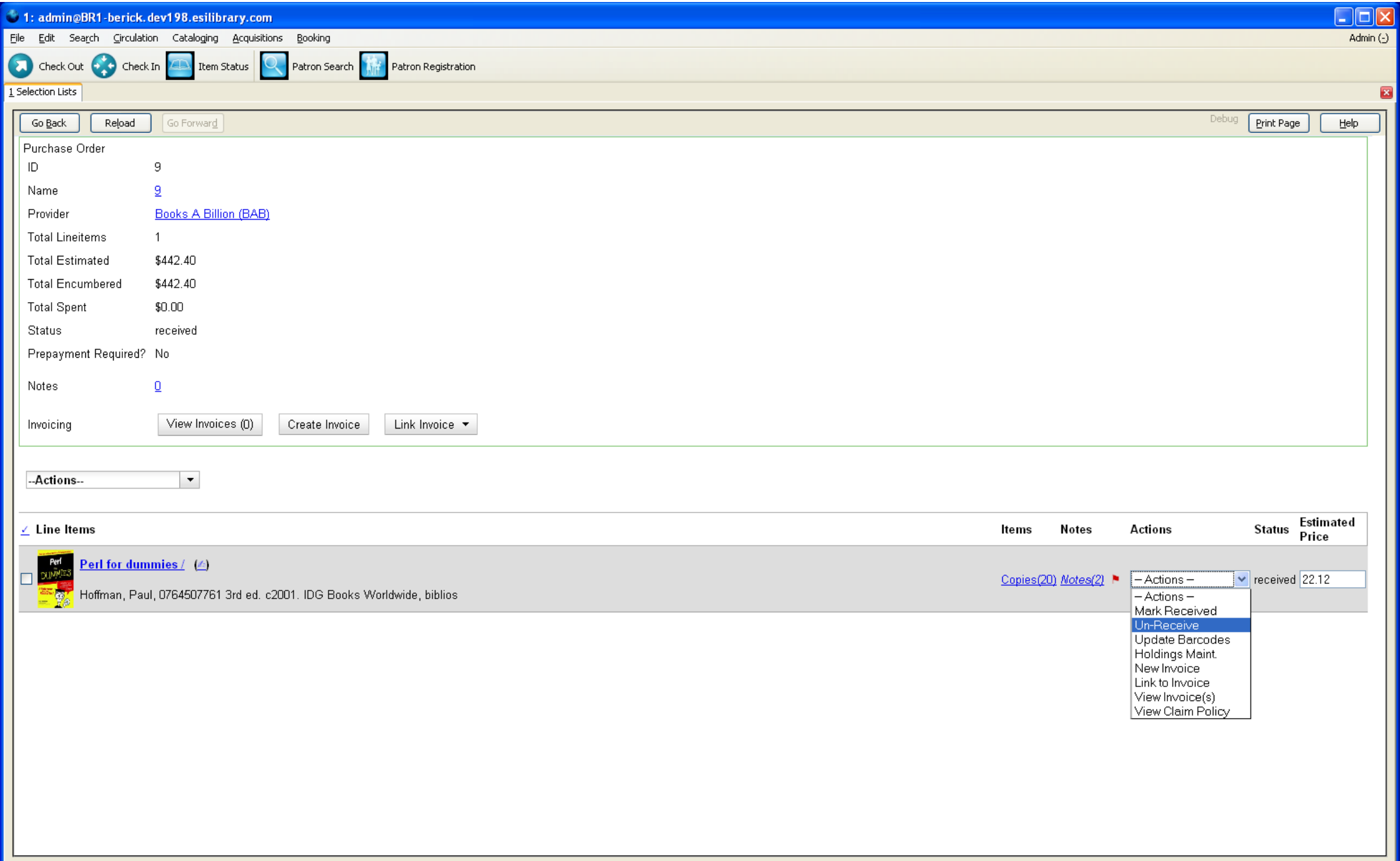
Receiving & Claiming

- Full/Partial Receive
- Full/Partial Un-Receive
- Lineitem Worksheets
- Claim Policies
- Claiming

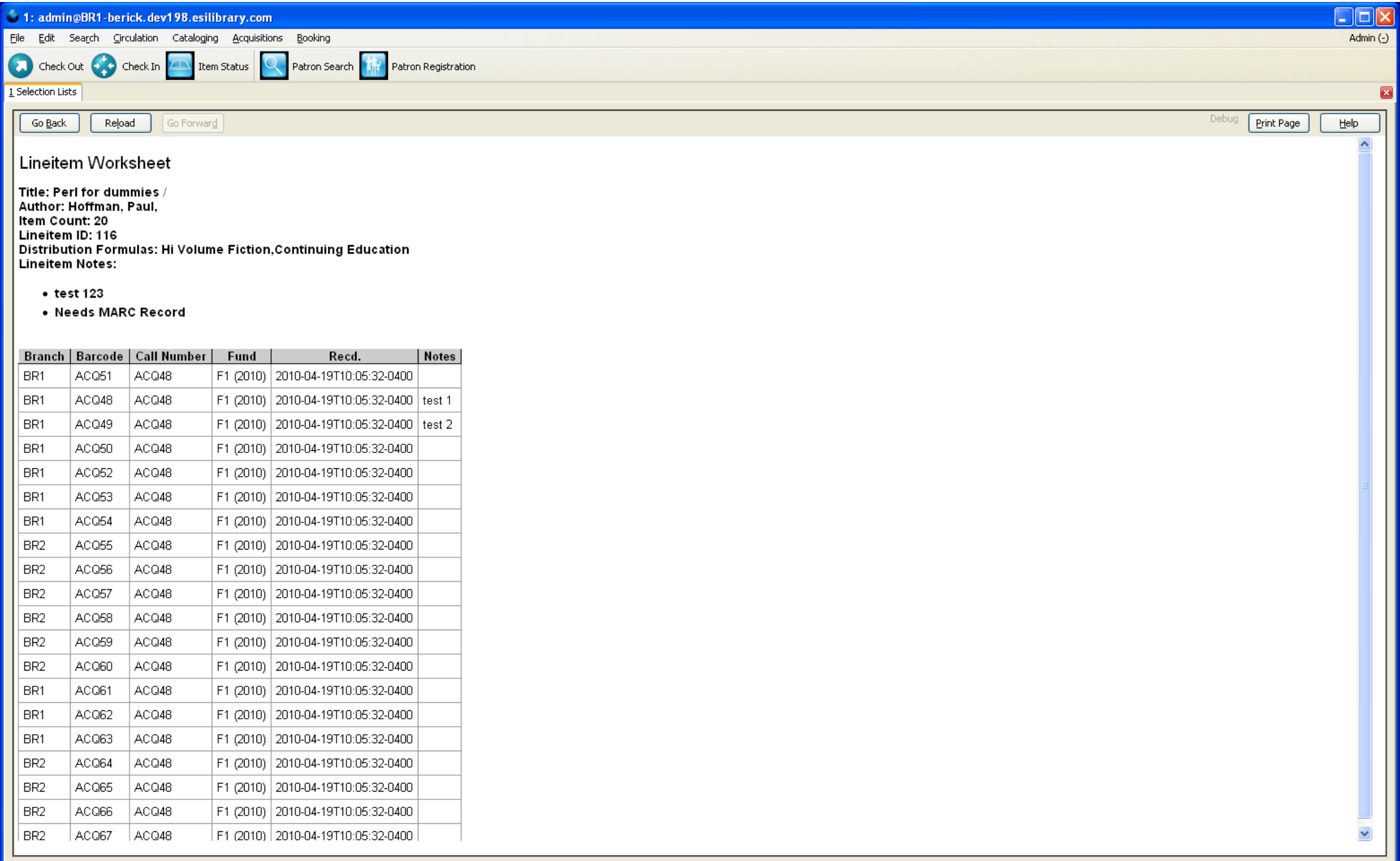
Levels of Receiving



Levels of Un-Receive



Lineitem Worksheets



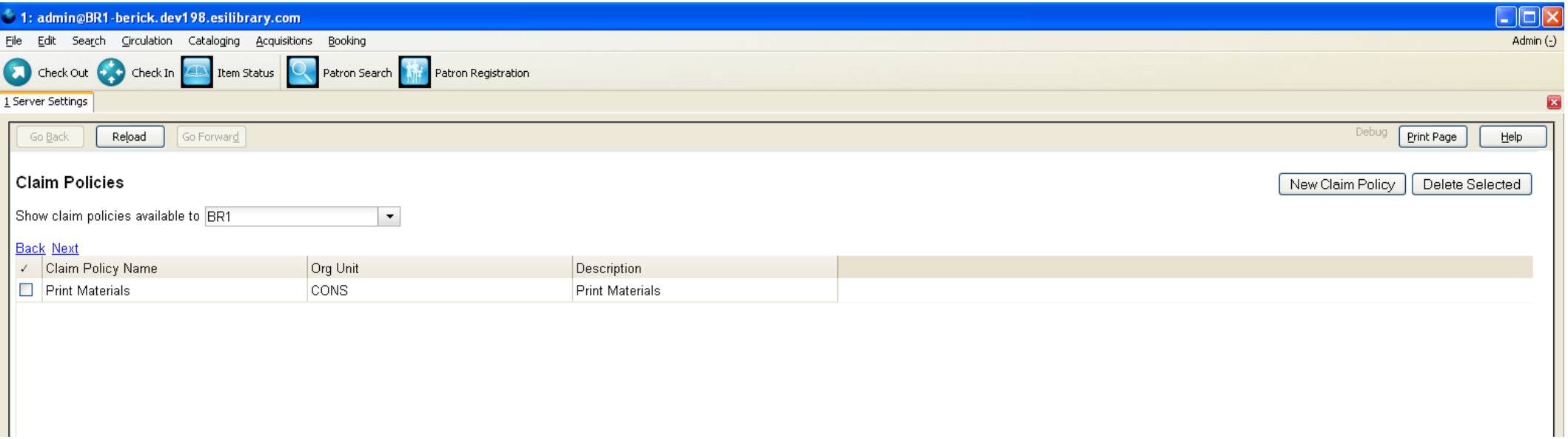
Lineitem Worksheet

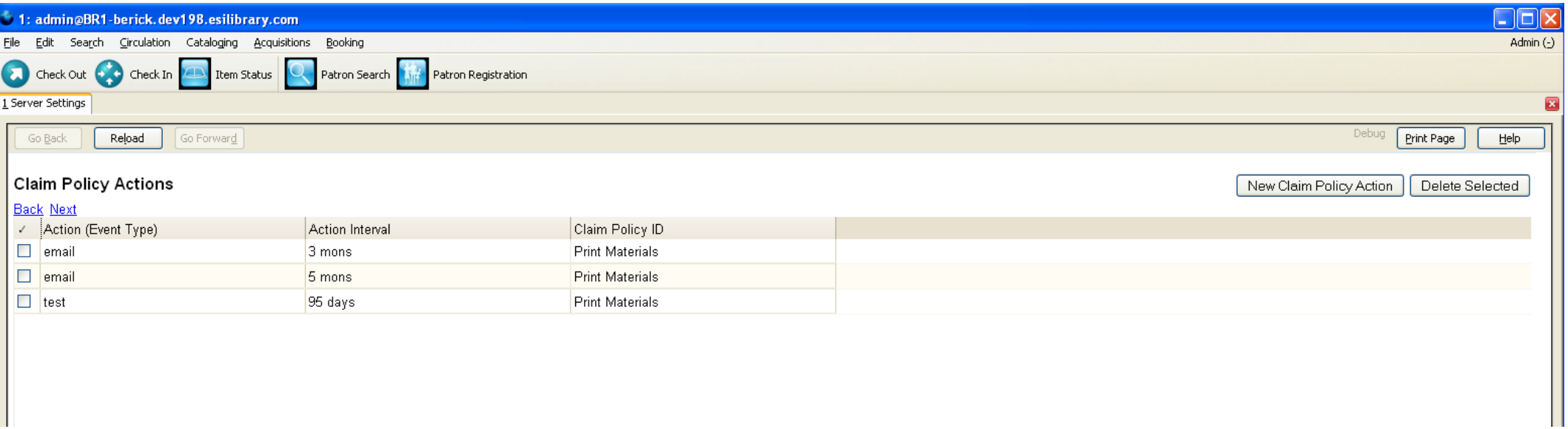
Title: Perl for dummies /
Author: Hoffman, Paul,
Item Count: 20
Lineitem ID: 116
Distribution Formulas: Hi Volume Fiction,Continuing Education
Lineitem Notes:

- **test 123**
- **Needs MARC Record**

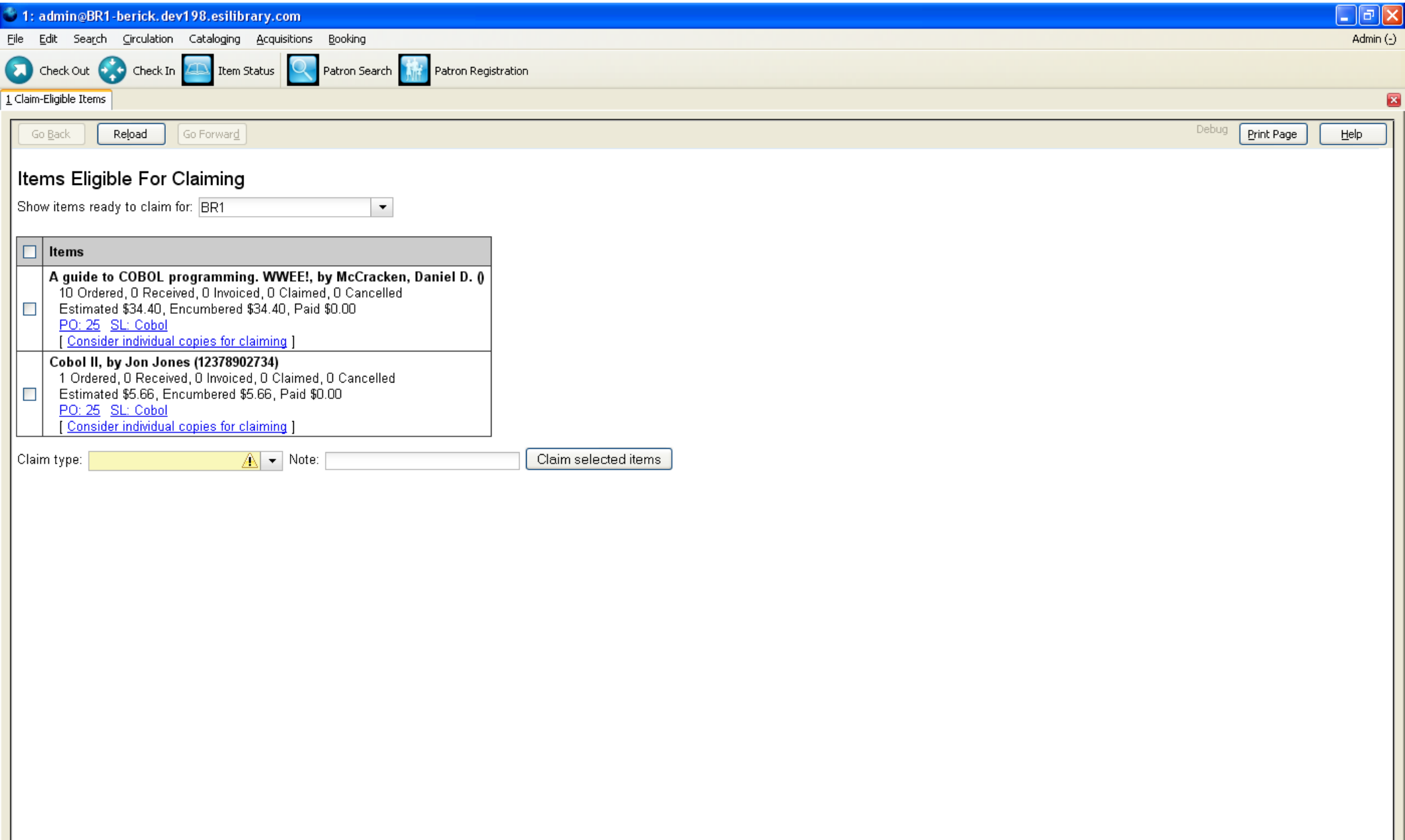
Branch	Barcode	Call Number	Fund	Recd.	Notes
BR1	ACQ51	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ48	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	test 1
BR1	ACQ49	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	test 2
BR1	ACQ50	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ52	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ53	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ54	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ55	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ56	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ57	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ58	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ59	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ60	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ61	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ62	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ63	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ64	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ65	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ66	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ67	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	

Claim Policies





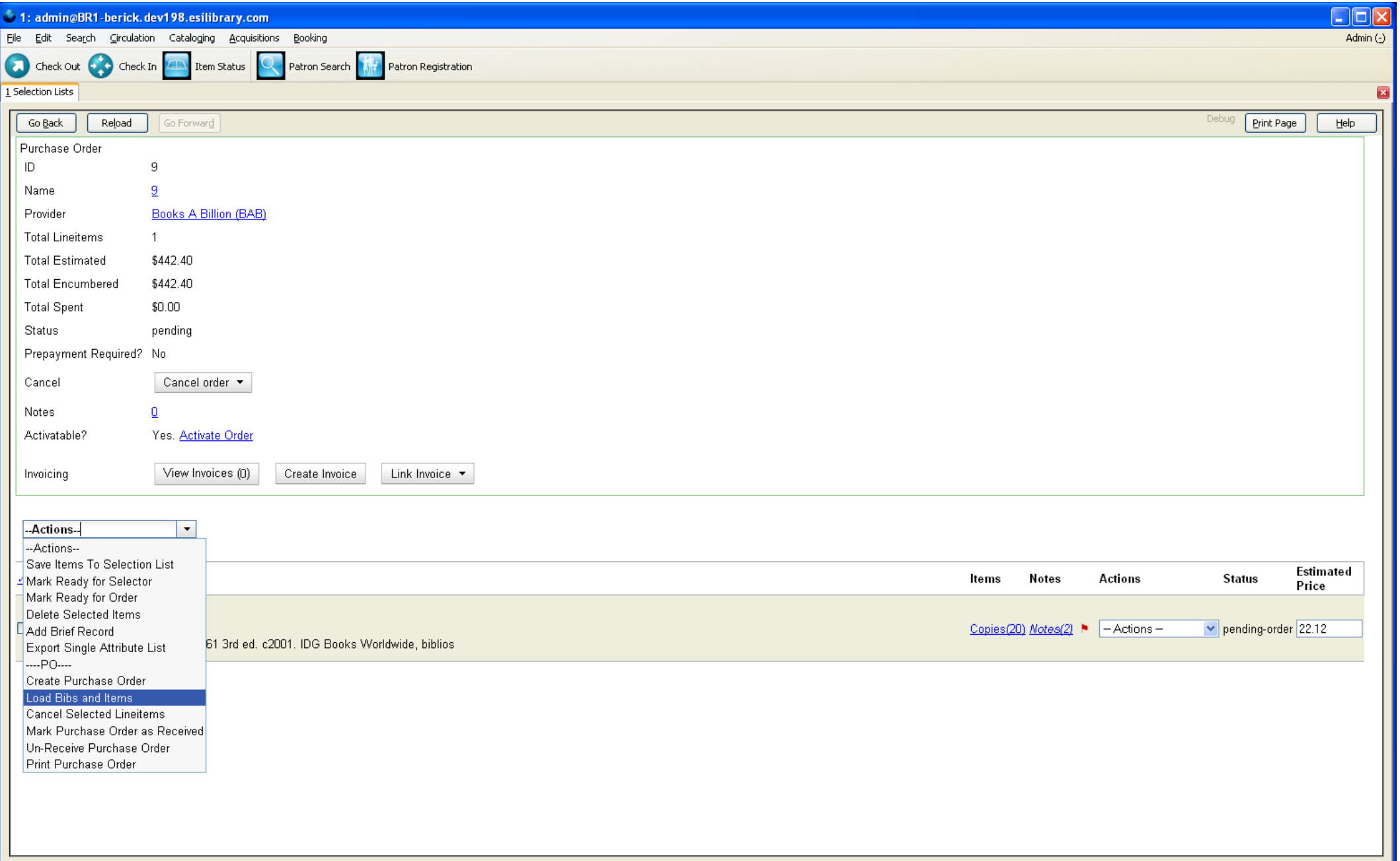
Claim-Ready Items



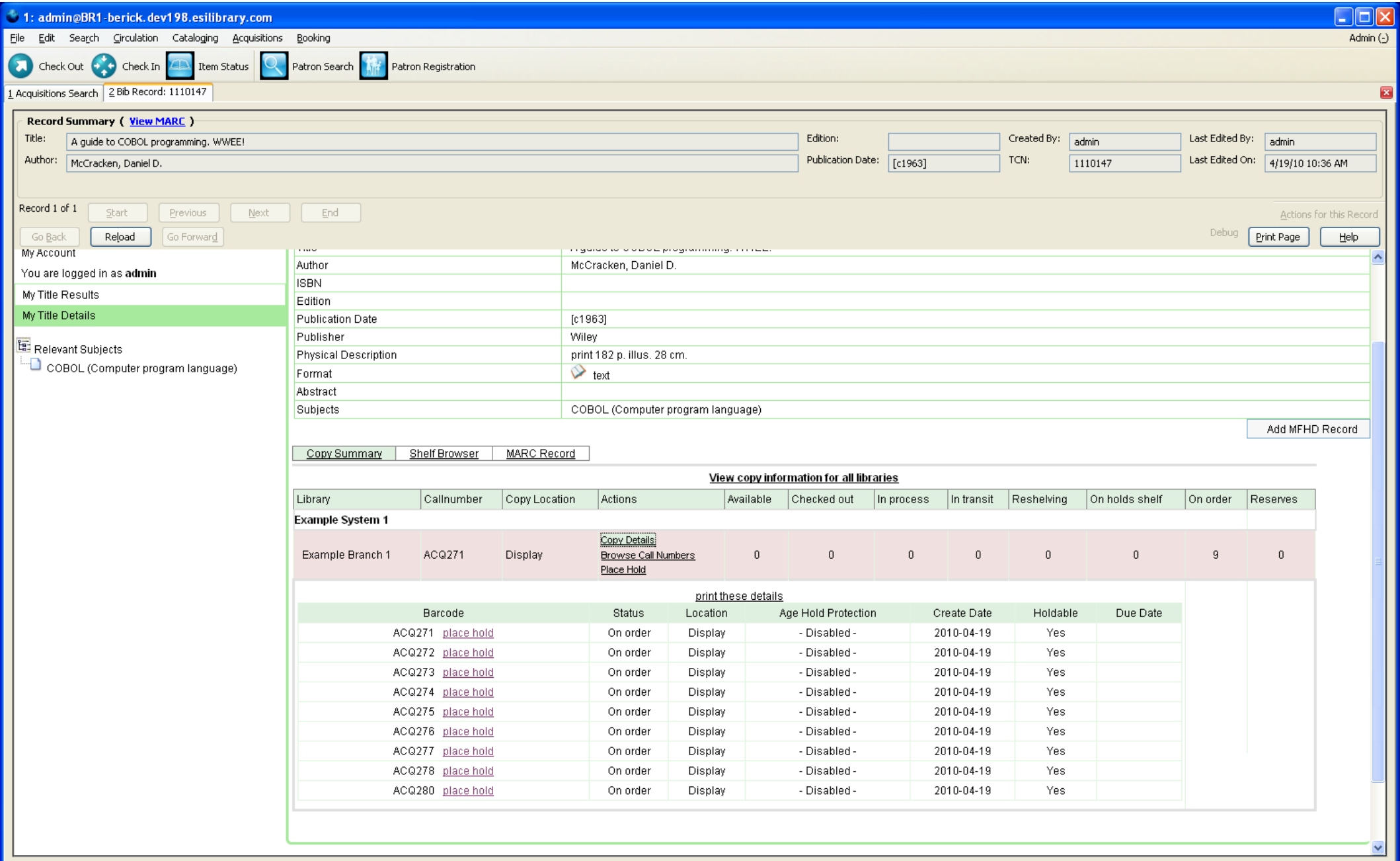
Cataloging

- Lineitem / Bib Record Links
- Importing Bib Records from ACQ
- Auto-generated Barcodes & Callnumbers
- Batch Barcode Updating
- Holdings Maintenance
- MARC Import / Merge / Overlay & Connexion

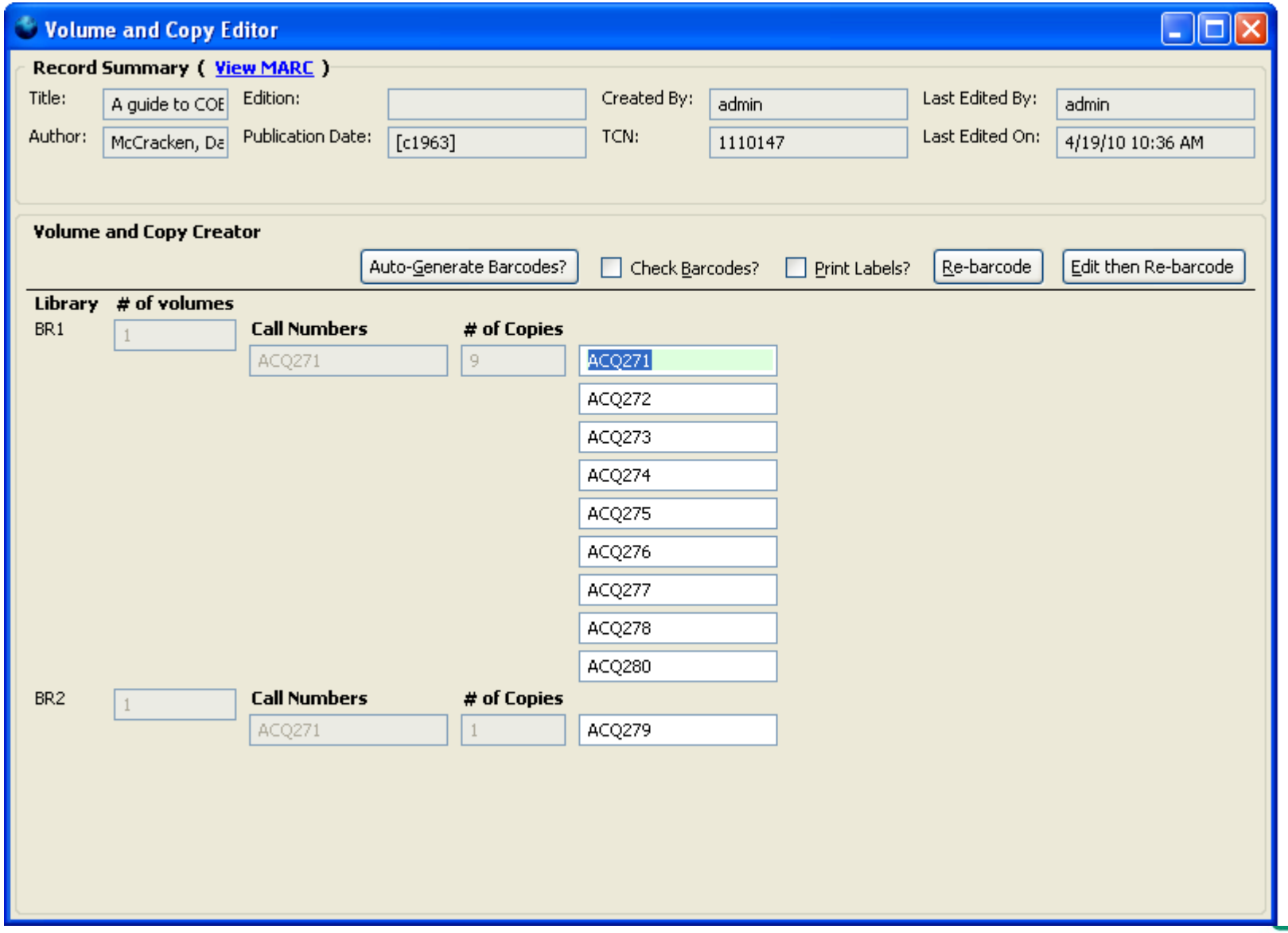
Import ACQ Records



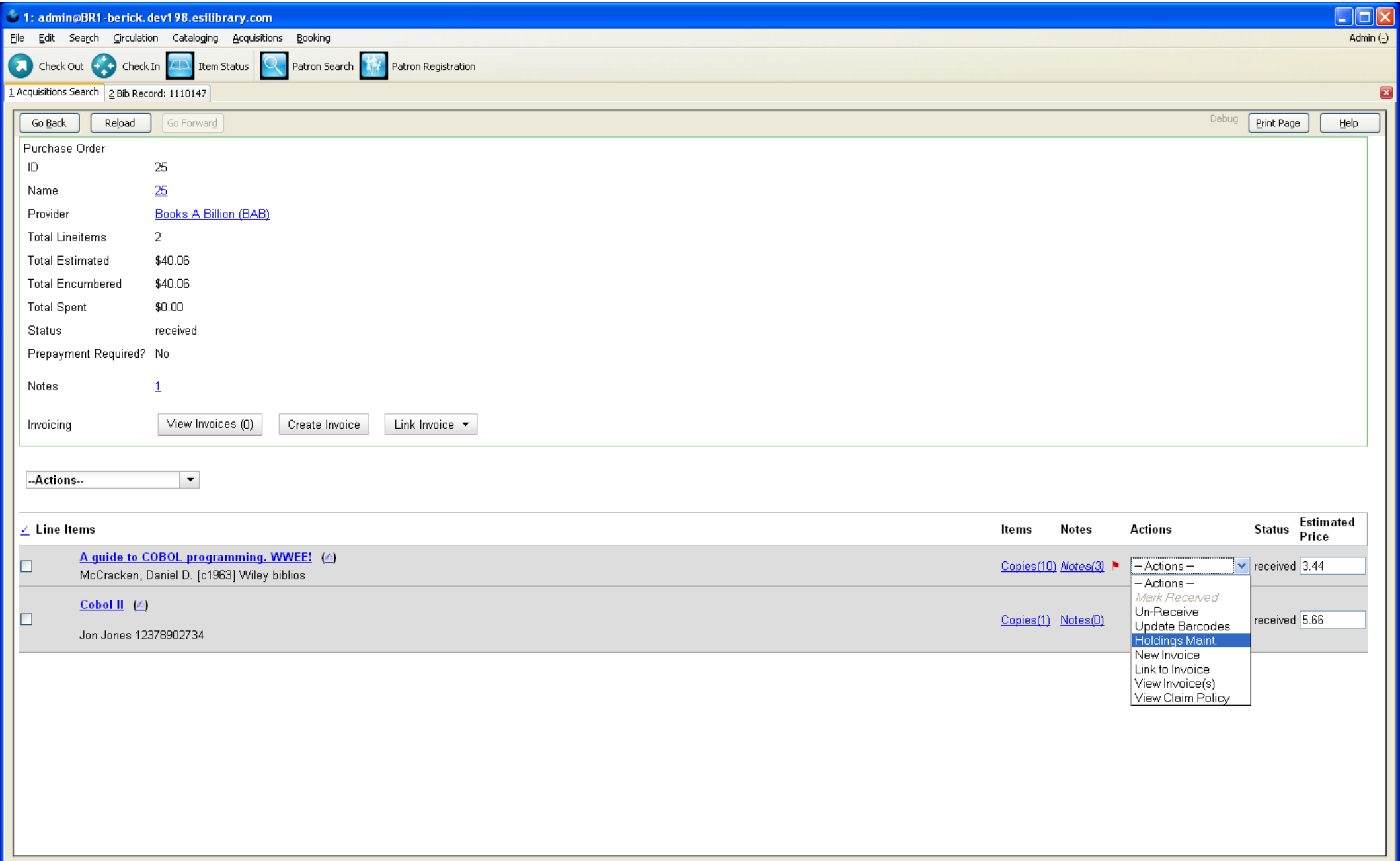
Auto-Generated Barcodes / CNs



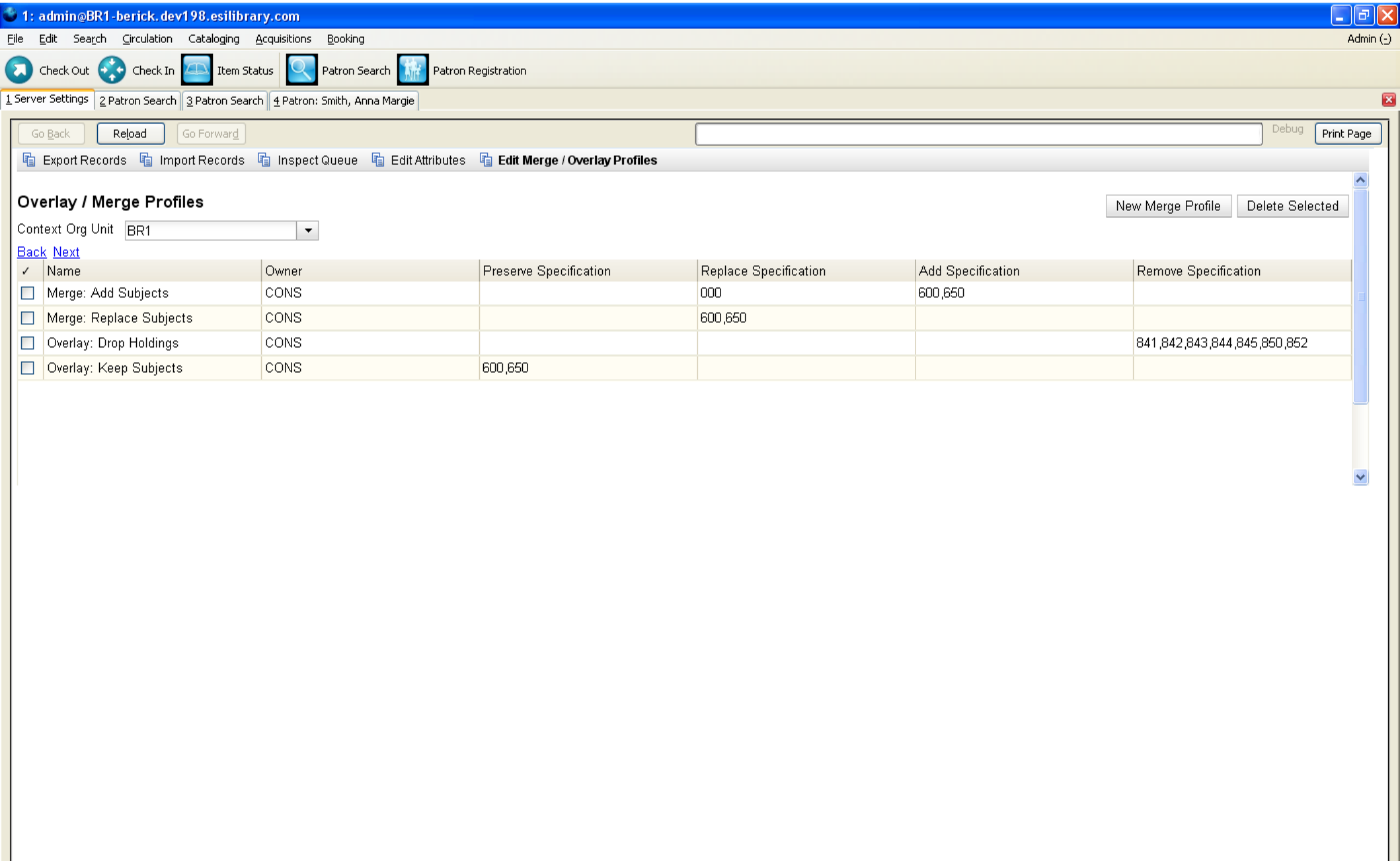
Batch Barcode Editing



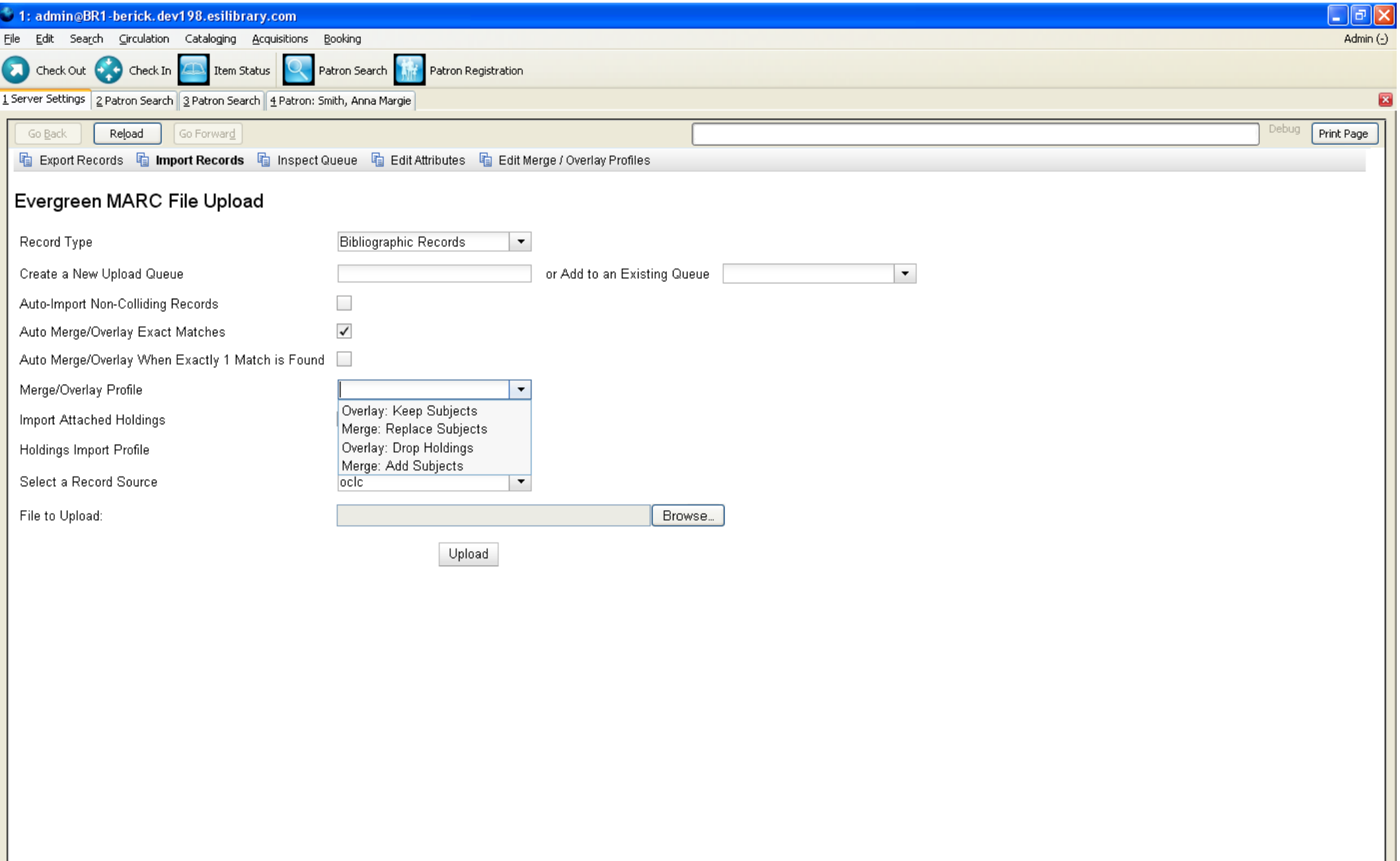
Holdings Maintenance



MARC Import/Merge/Overlay



MARC Import/Merge/Overlay



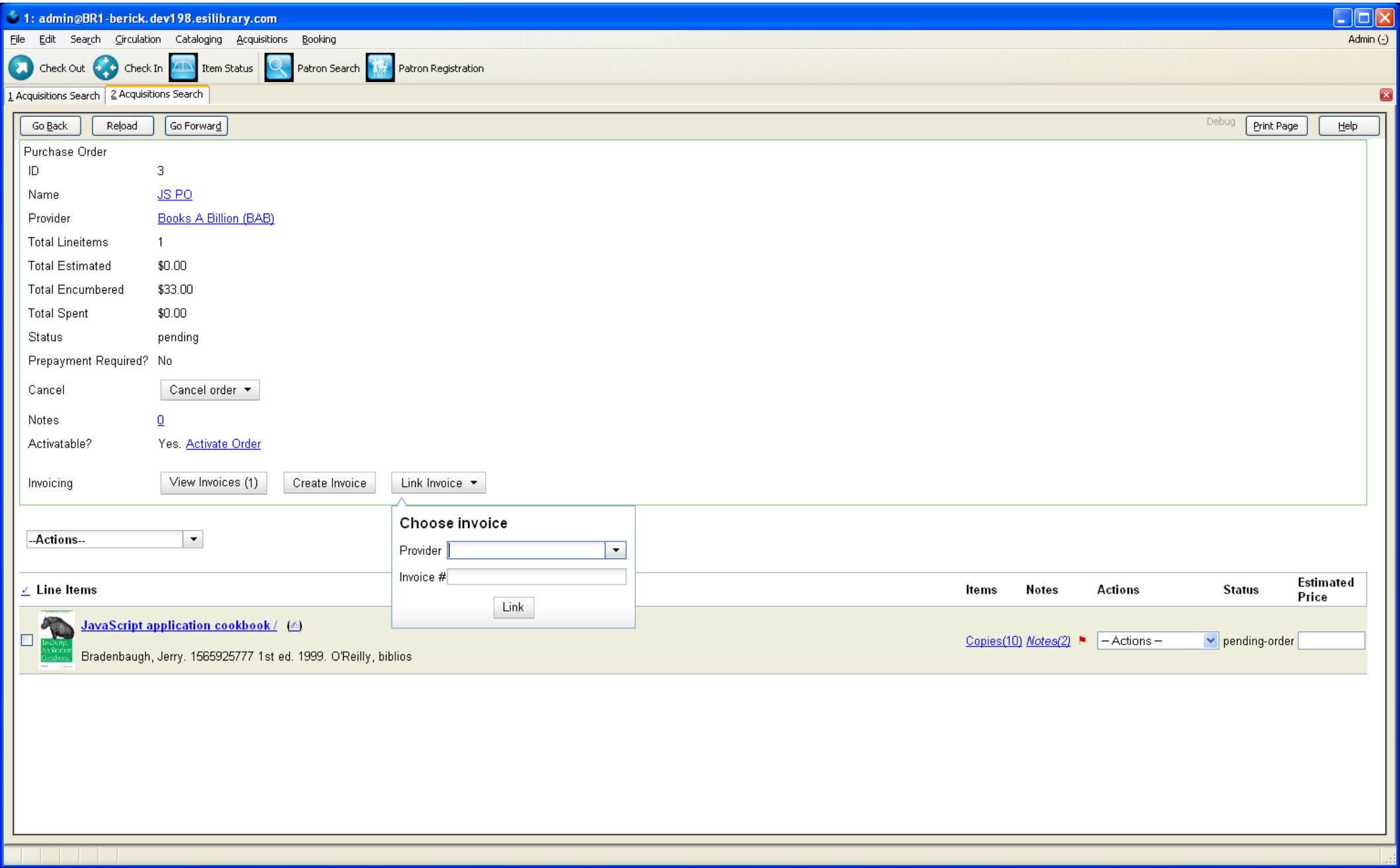
Connexion Integration

- Using Cataloging Import/Merge profiles
- Support for embedded action codes
  - 905t = merge profile
  - 905a = add specification, etc.
  - 905 $a 650abc,655d, 660

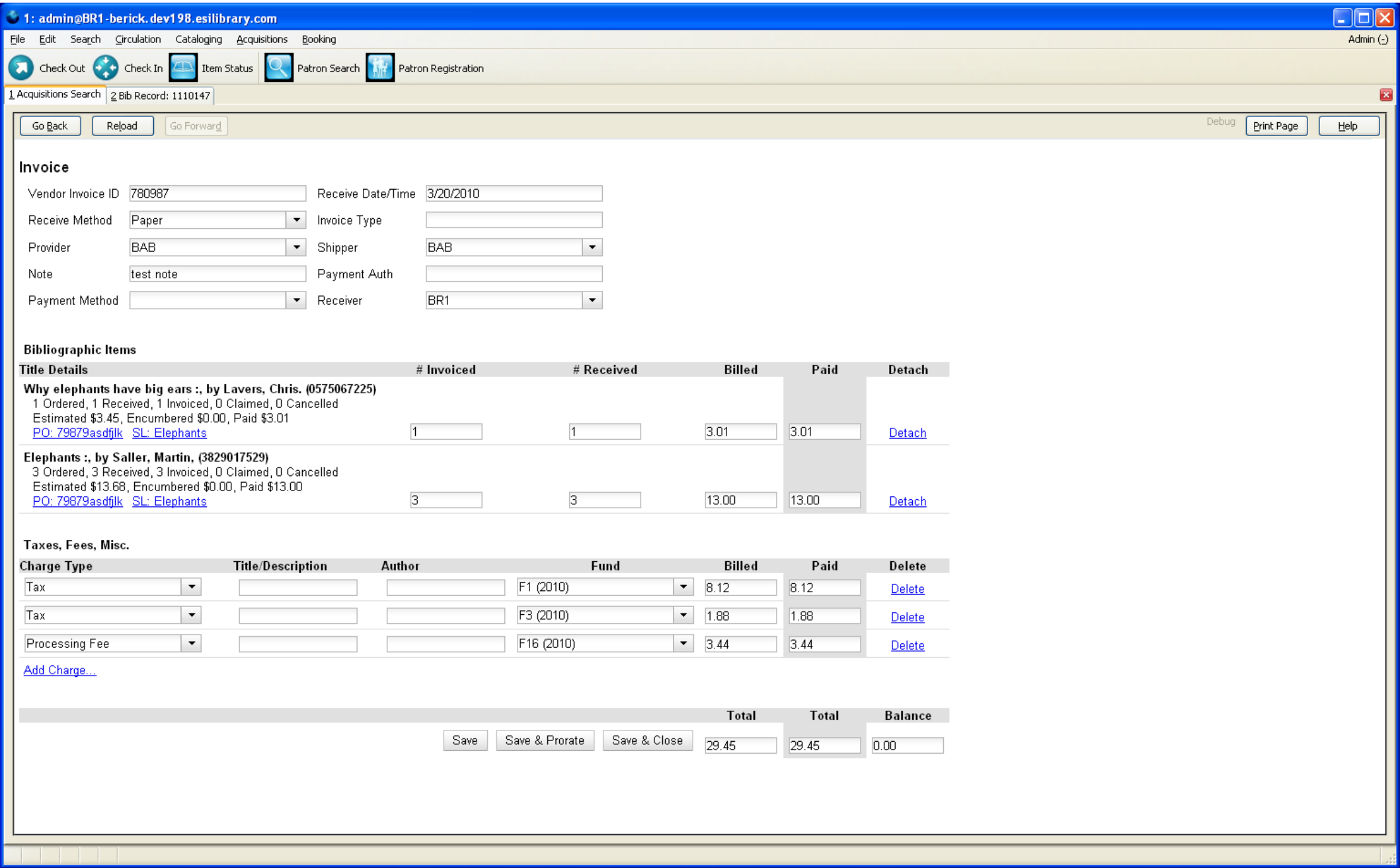
Invoicing

- Creating & Linking
- Local charge types and fees
- Prorating
- Closing & Re-opening
- In Progress: Printing Vouchers

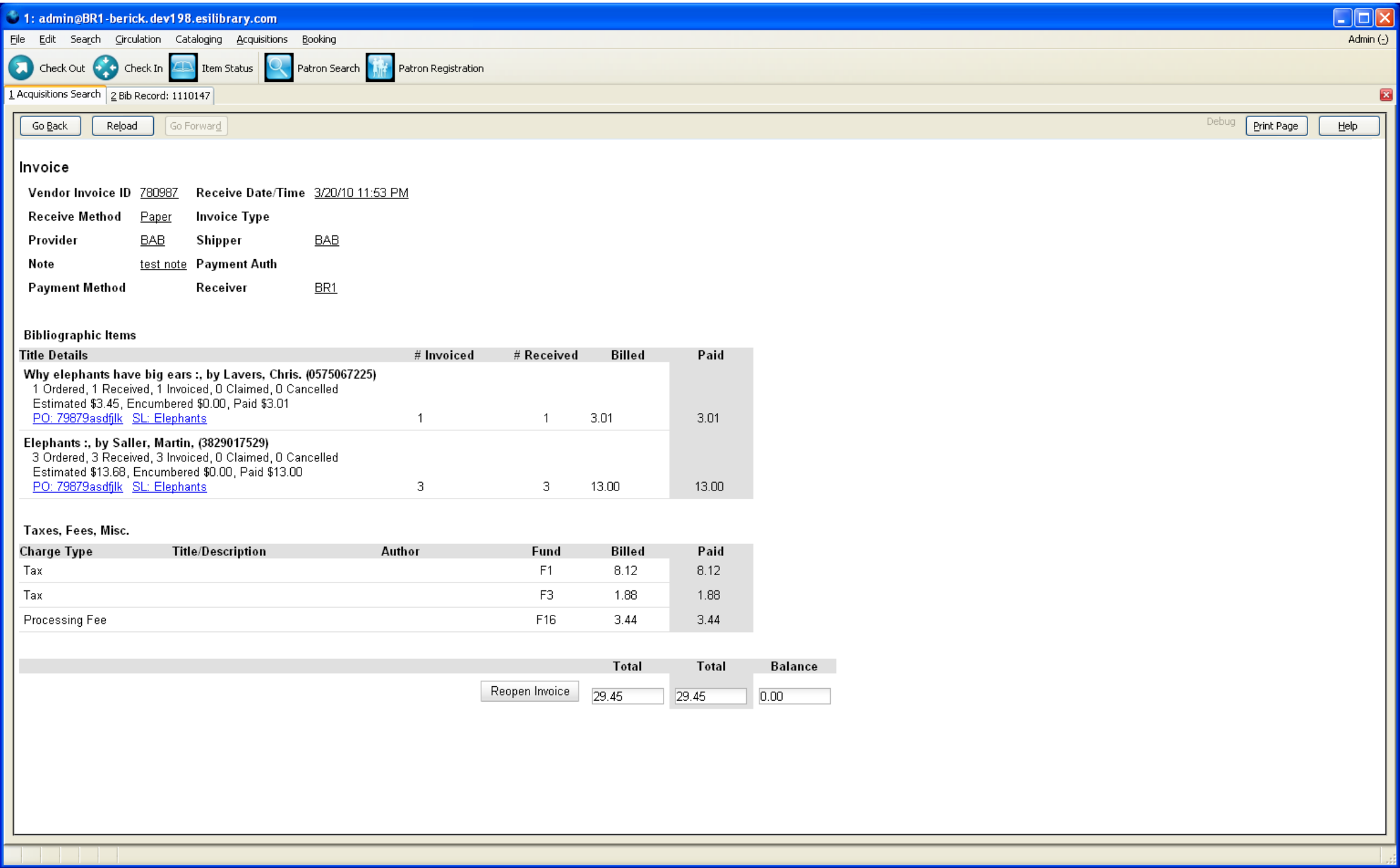
Invoice Creating / Linking



Invoice: Editing, Charges, Prorating



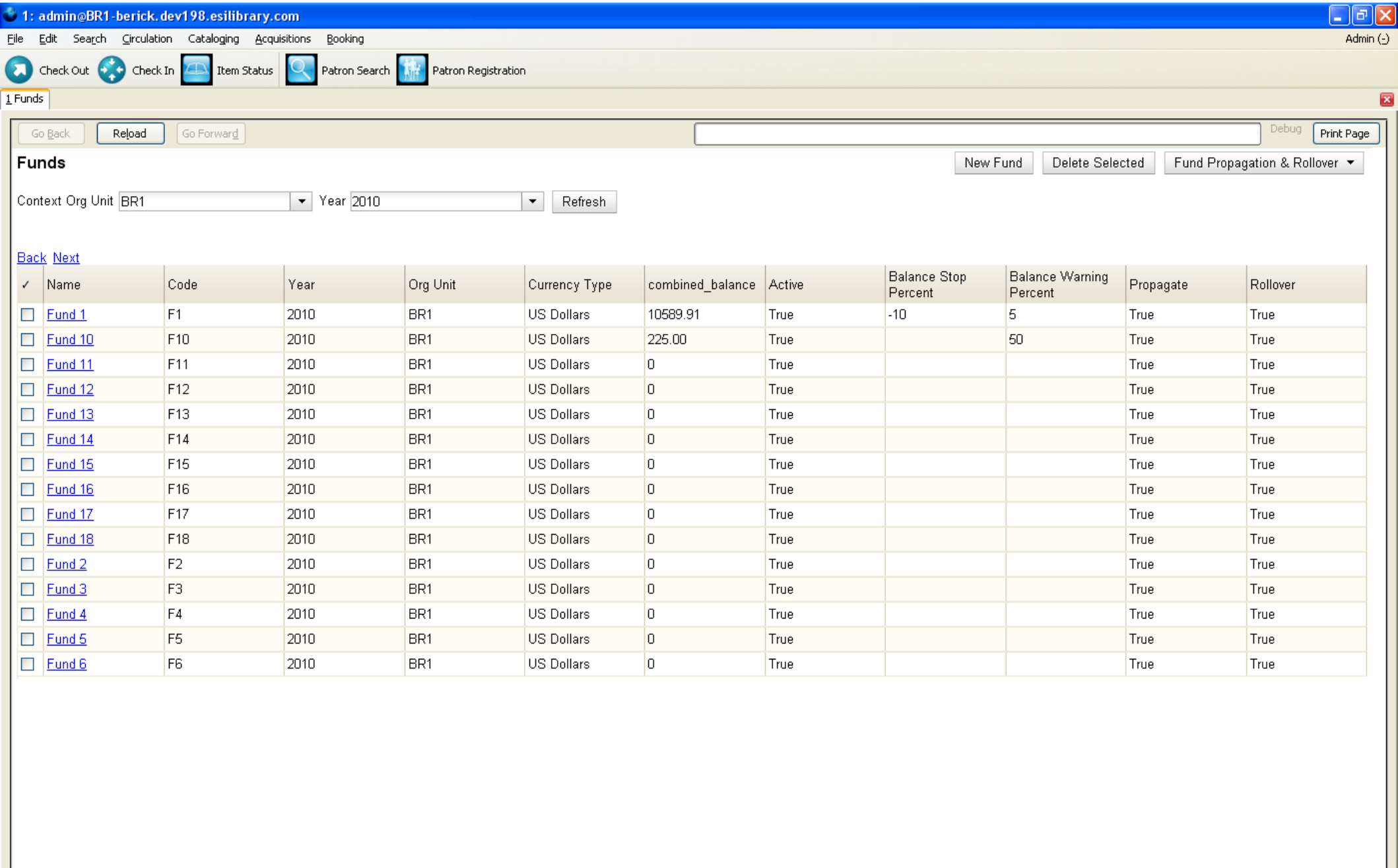
Invoices: Closing & Re-Opening



Administration

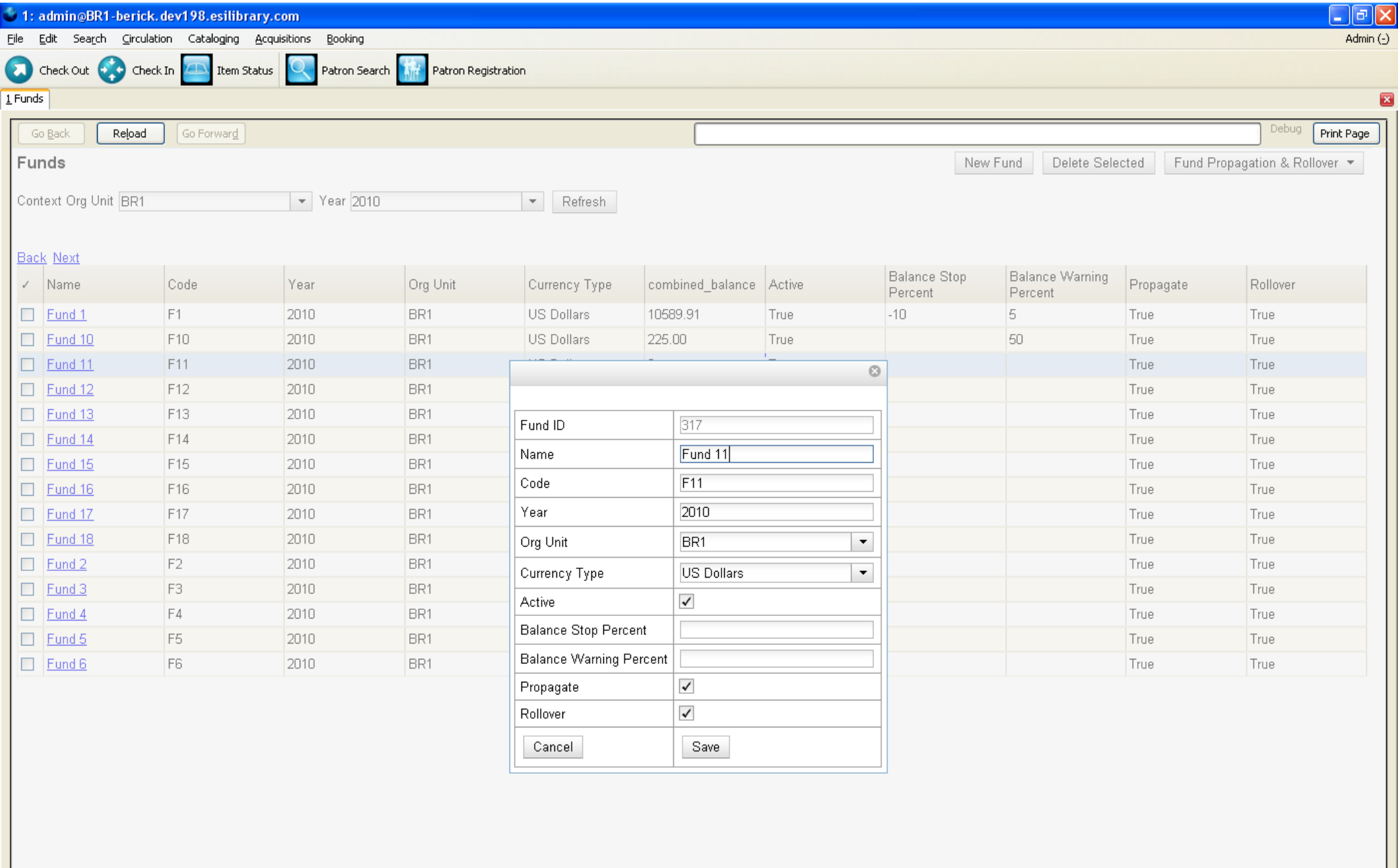
- Funds, Tags & Fiscal Rollover
- Providers/Vendors
- Distribution Formulas
- Lineitem Alerts
- Cancellation Reasons
- Editing Templates (PO, worksheets, Notices,...)

Funds

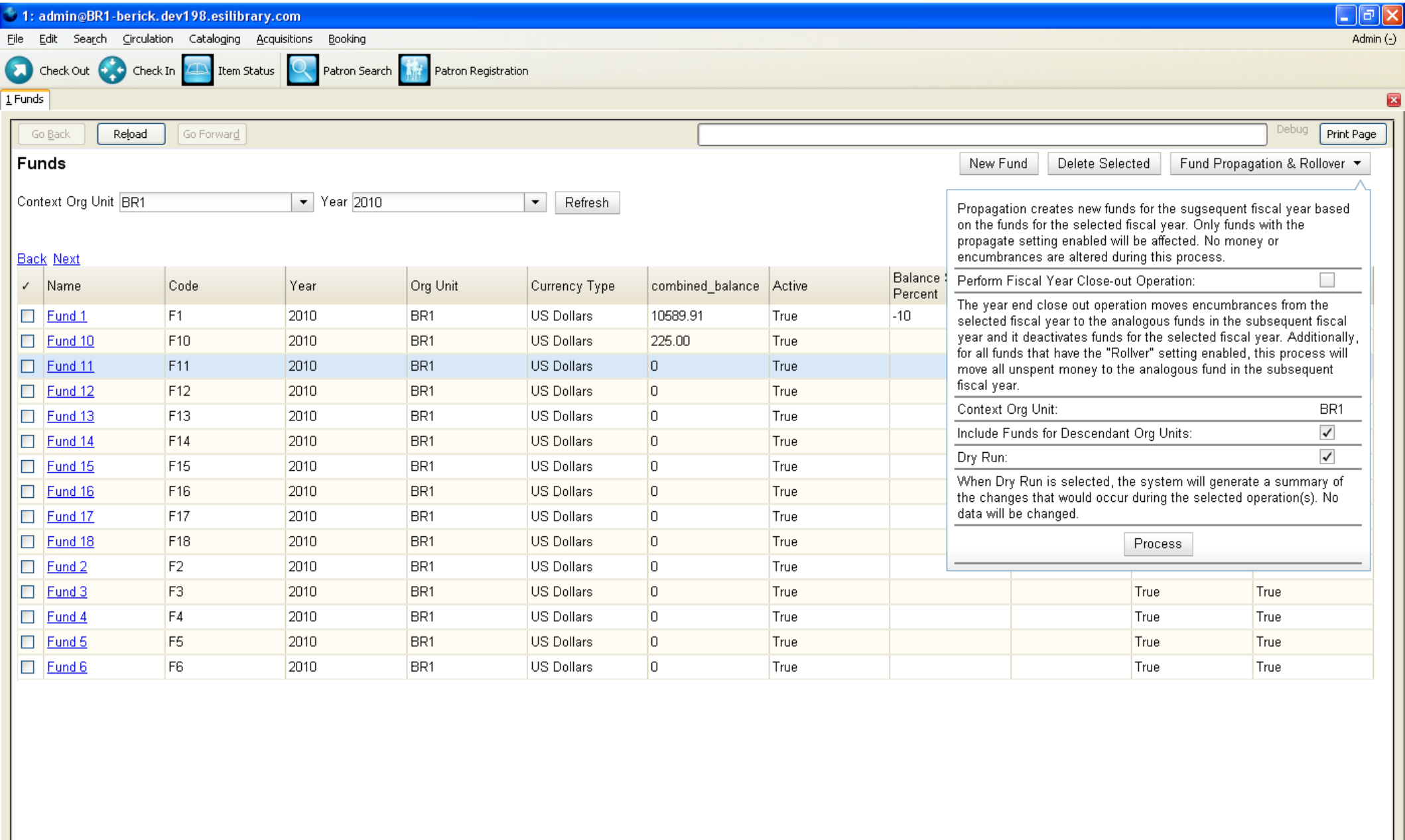


✓	Name	Code	Year	Org Unit	Currency Type	combined_balance	Active	Balance Stop Percent	Balance Warning Percent	Propagate	Rollover
☐	Fund 1	F1	2010	BR1	US Dollars	10589.91	True	-10	5	True	True
☐	Fund 10	F10	2010	BR1	US Dollars	225.00	True		50	True	True
☐	Fund 11	F11	2010	BR1	US Dollars	0	True			True	True
☐	Fund 12	F12	2010	BR1	US Dollars	0	True			True	True
☐	Fund 13	F13	2010	BR1	US Dollars	0	True			True	True
☐	Fund 14	F14	2010	BR1	US Dollars	0	True			True	True
☐	Fund 15	F15	2010	BR1	US Dollars	0	True			True	True
☐	Fund 16	F16	2010	BR1	US Dollars	0	True			True	True
☐	Fund 17	F17	2010	BR1	US Dollars	0	True			True	True
☐	Fund 18	F18	2010	BR1	US Dollars	0	True			True	True
☐	Fund 2	F2	2010	BR1	US Dollars	0	True			True	True
☐	Fund 3	F3	2010	BR1	US Dollars	0	True			True	True
☐	Fund 4	F4	2010	BR1	US Dollars	0	True			True	True
☐	Fund 5	F5	2010	BR1	US Dollars	0	True			True	True
☐	Fund 6	F6	2010	BR1	US Dollars	0	True			True	True

Fund Editing

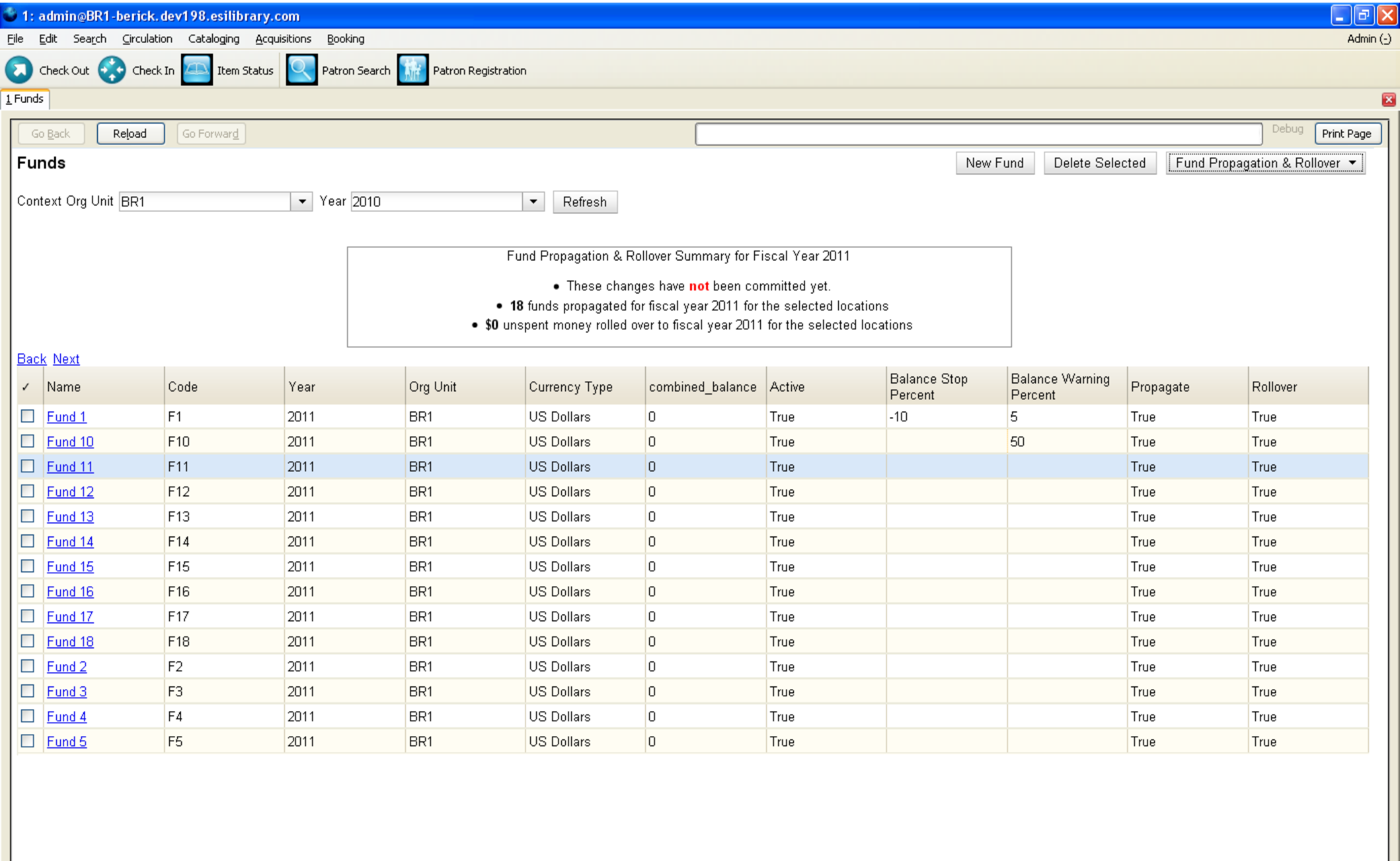


Fiscal Rollover



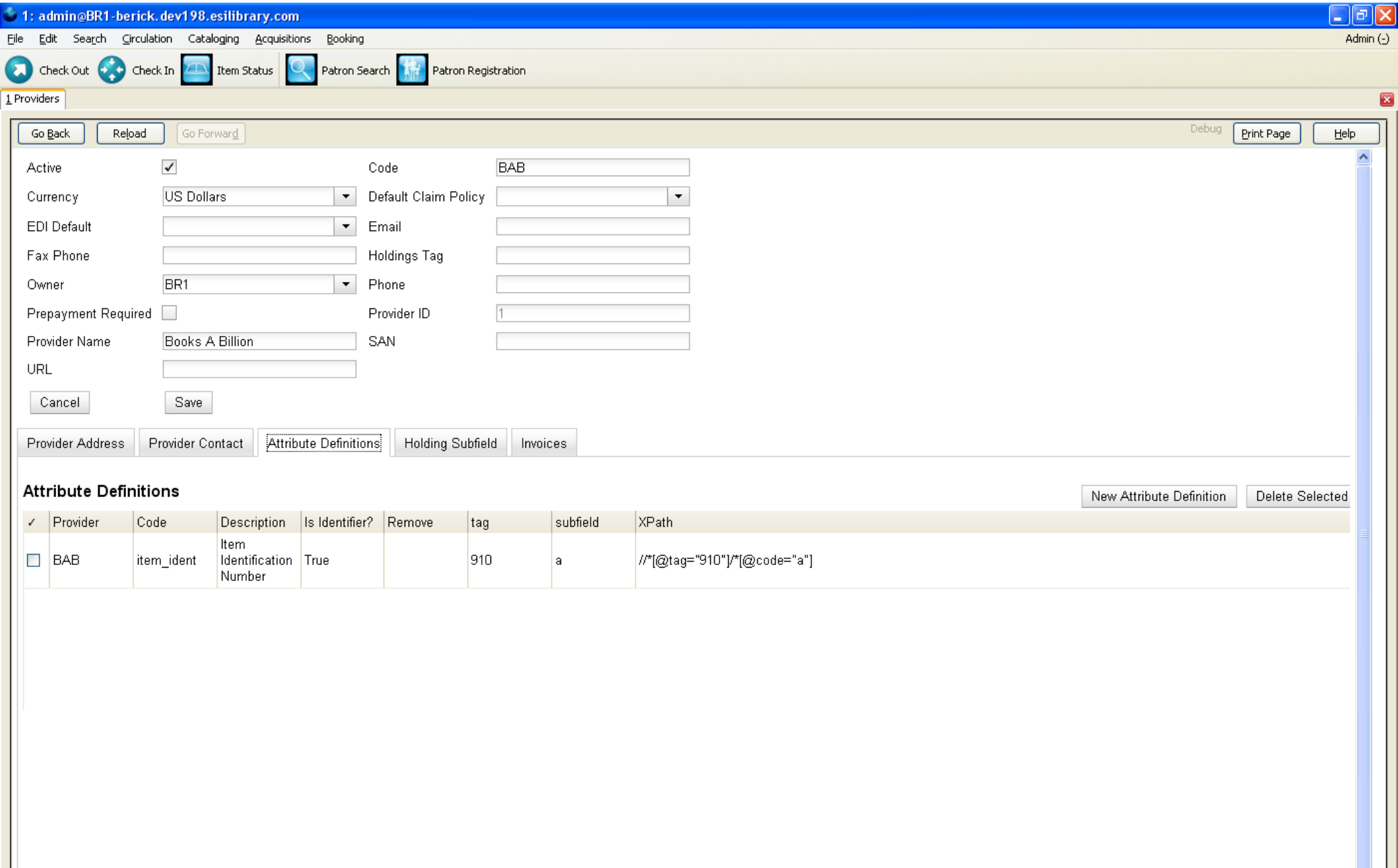
✓	Name	Code	Year	Org Unit	Currency Type	combined_balance	Active	Balance Percent			
☐	Fund 1	F1	2010	BR1	US Dollars	10589.91	True	-10			
☐	Fund 10	F10	2010	BR1	US Dollars	225.00	True				
☐	Fund 11	F11	2010	BR1	US Dollars	0	True				
☐	Fund 12	F12	2010	BR1	US Dollars	0	True				
☐	Fund 13	F13	2010	BR1	US Dollars	0	True				
☐	Fund 14	F14	2010	BR1	US Dollars	0	True				
☐	Fund 15	F15	2010	BR1	US Dollars	0	True				
☐	Fund 16	F16	2010	BR1	US Dollars	0	True				
☐	Fund 17	F17	2010	BR1	US Dollars	0	True				
☐	Fund 18	F18	2010	BR1	US Dollars	0	True				
☐	Fund 2	F2	2010	BR1	US Dollars	0	True				
☐	Fund 3	F3	2010	BR1	US Dollars	0	True			True	True
☐	Fund 4	F4	2010	BR1	US Dollars	0	True			True	True
☐	Fund 5	F5	2010	BR1	US Dollars	0	True			True	True
☐	Fund 6	F6	2010	BR1	US Dollars	0	True			True	True

Fiscal Rollover Review

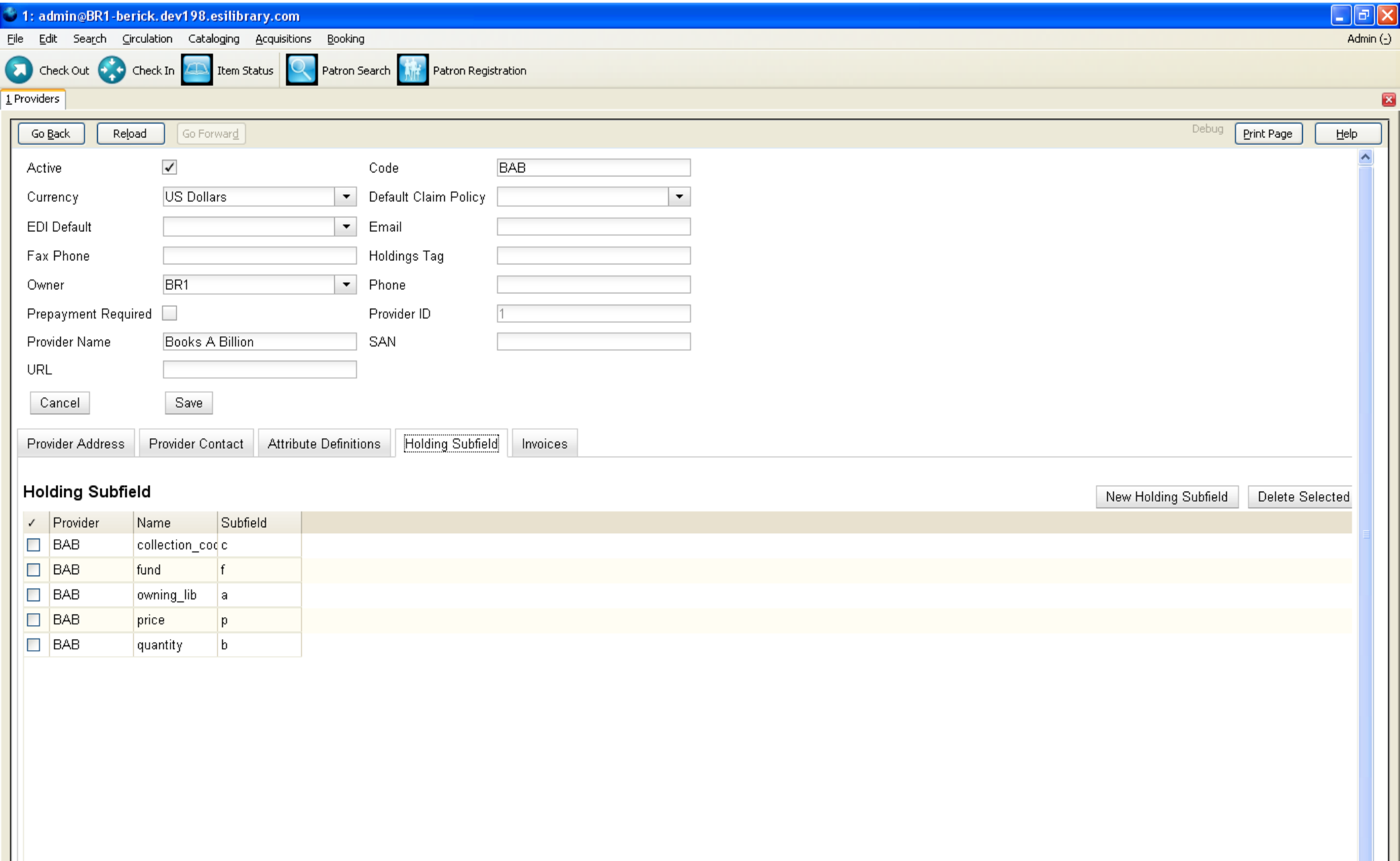


✓	Name	Code	Year	Org Unit	Currency Type	combined_balance	Active	Balance Stop Percent	Balance Warning Percent	Propagate	Rollover
☐	Fund 1	F1	2011	BR1	US Dollars	0	True	-10	5	True	True
☐	Fund 10	F10	2011	BR1	US Dollars	0	True		50	True	True
☐	Fund 11	F11	2011	BR1	US Dollars	0	True			True	True
☐	Fund 12	F12	2011	BR1	US Dollars	0	True			True	True
☐	Fund 13	F13	2011	BR1	US Dollars	0	True			True	True
☐	Fund 14	F14	2011	BR1	US Dollars	0	True			True	True
☐	Fund 15	F15	2011	BR1	US Dollars	0	True			True	True
☐	Fund 16	F16	2011	BR1	US Dollars	0	True			True	True
☐	Fund 17	F17	2011	BR1	US Dollars	0	True			True	True
☐	Fund 18	F18	2011	BR1	US Dollars	0	True			True	True
☐	Fund 2	F2	2011	BR1	US Dollars	0	True			True	True
☐	Fund 3	F3	2011	BR1	US Dollars	0	True			True	True
☐	Fund 4	F4	2011	BR1	US Dollars	0	True			True	True
☐	Fund 5	F5	2011	BR1	US Dollars	0	True			True	True

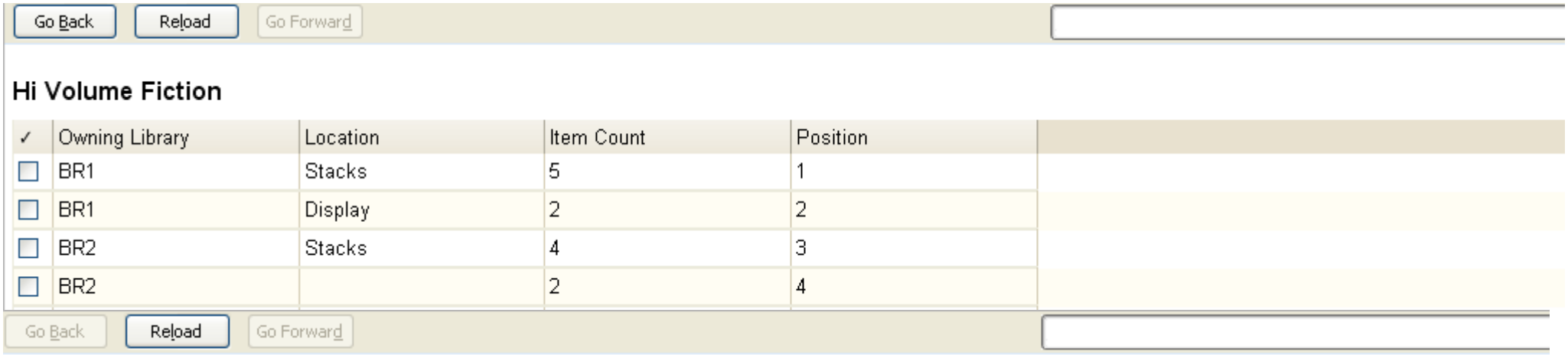
Vendors: Import Attributes

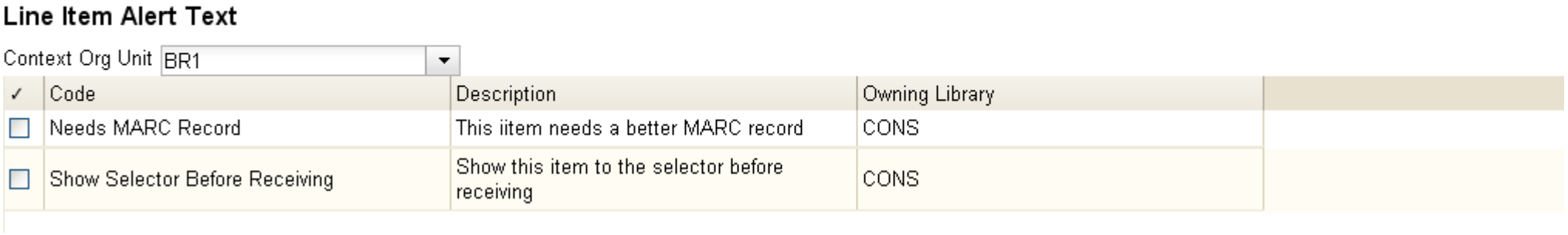


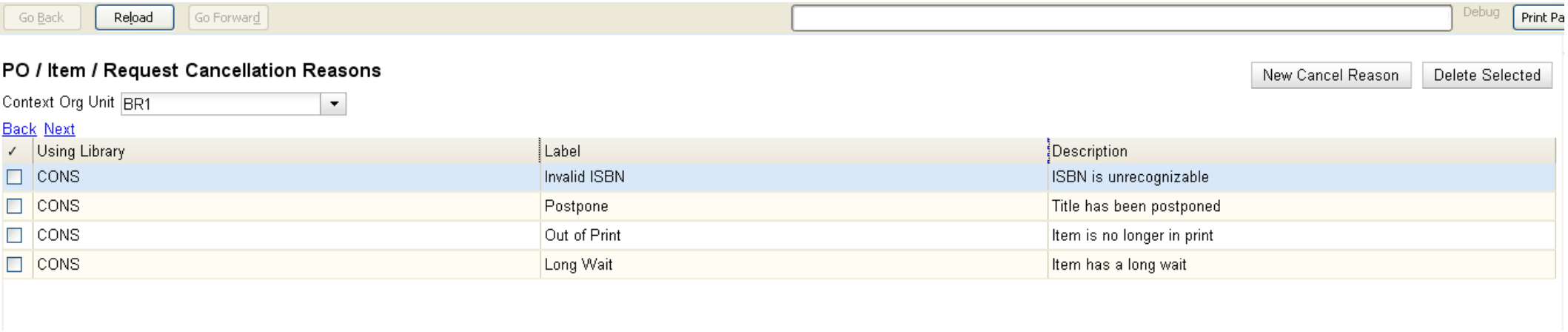
Vendors: Import Attributes



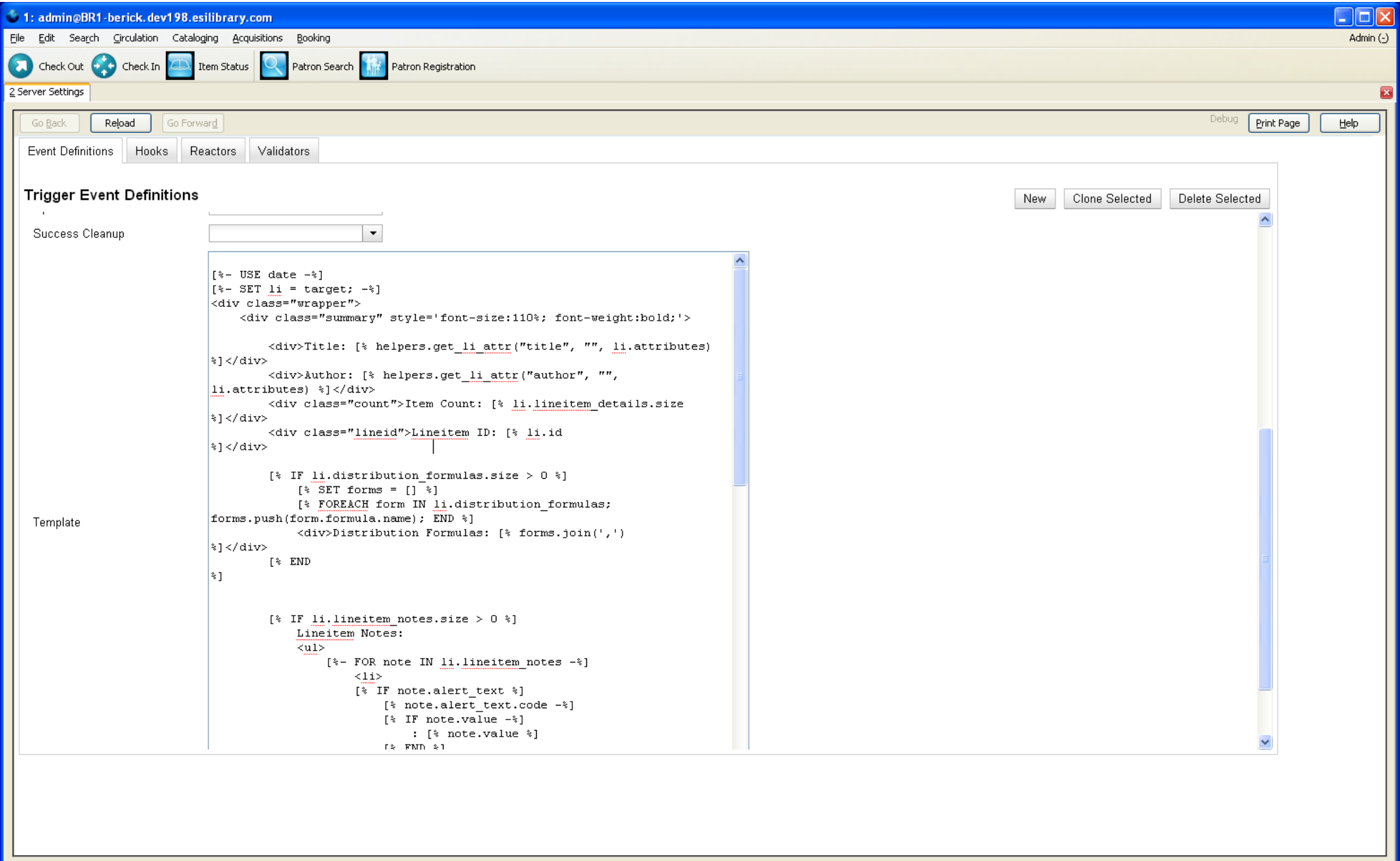
Formulas, Alerts, Cancel Reasons







Templates


1: admin@BR1-berick.dev198.esilibrary.com
File Edit Search Circulation Cataloging Acquisitions Booking
Admin (-)
Check Out
Check In
Item Status
Patron Search
Patron Registration
2 Server Settings
Go Back
Reload
Go Forward
Debug
Print Page
Help
Event Definitions
Hooks
Reactors
Validators
Trigger Event Definitions
New
Clone Selected
Delete Selected
Success Cleanup
Template
[%- USE date -%]
[%- SET li = target; -%]

Title: [% helpers.get_li_attr("title", "", li.attributes) %]
Author: [% helpers.get_li_attr("author", "", li.attributes) %]
Item Count: [% li.lineitem_details.size %]
Lineitem ID: [% li.id %]
[% IF li.distribution_formulas.size > 0 %]
[% SET forms = [] %]
[% FOREACH form IN li.distribution_formulas; forms.push(form.formula.name); END %]
Distribution Formulas: [% forms.join(',') %]
[% END %]
[% IF li.lineitem_notes.size > 0 %]
Lineitem Notes:

[%- FOR note IN li.lineitem_notes -%]

[% IF note.alert_text %]
[% note.alert_text.code -%]
[% IF note.value -%]
: [% note.value %]

What's Next

- In Progress
  - Testing, Review, Interface Efficiency, More Testing
  - Non-bib encumbrances
  - More EDI...
  - Saved Searches
  - Standing Orders
  - More MARC Import enhancements
- Enhanced Vendor Connectivity

Bill Erickson

equinox SOFTWARE

Questions?

Slides Available at evergreen-ils.org

http://evergreen-ils.org/dokuwiki/doku.php?id=advocacy:presentations

GR
2010