

Getting Started with Embedded Order Data (EOD) in the I-Share Voyager Environment

I. Definition

Embedded Order Data processing for Voyager enables a library to create purchase orders automatically based on order details (such as price, fund, and location) embedded in vendor-supplied MARC records. Bibliographic, MFHD, and item records, if desired, can be created at the time the purchase order is created.

II. Overview: to Implement EOD

1. Contact the vendor(s) with which you want to use EOD; they have worked with other libraries and can assist you with setting up the necessary procedures at their end. You will need to negotiate file pick-up and drop-off locations on the vendor's servers and determine whether the vendor has any particular file-naming conventions that you need to follow. In addition, because EOD uses MARC data embedded in the imported records to create the POs or other records, careful coordination of MARC field and subfield definitions is necessary.
2. Complete the appropriate set-up in Voyager System Administration. See section III below.
3. Inform CARLI of your decision to use EOD by having your I-Share Liaison file a work request using the WRO type of "Voyager EOD." CARLI staff will set up the appropriate file structure on the Reports server to process your EOD files.
4. Test! It is a good idea to try test loads with just a few records until you are satisfied that the process is working as desired. Carefully check both the cataloging and acquisitions results of the bulk import. The test loads can be scheduled with CARLI staff on an ad-hoc basis until you're satisfied that everything is working as it should.
5. When testing is complete, CARLI staff will schedule the automatic transfer and loading of files from CARLI's Files server (where your library's xxxftp directory is located) and the production server. See section IV below for more information.
6. Modify your workflow(s) as necessary to take the best advantage of EOD capabilities. Don't forget, Cataloging as well as Acquisitions workflow(s) will be affected.

III. Voyager System Administration Tasks to enable EOD

EOD is accomplished via the Voyager "bulk import" function. A new bulk import rule for each combination of vendor, account type, and resulting PO type (e.g., firm order, approval, etc.) must be created. The bulk import rule will govern whether bibs, MFHDs, items, POs, etc. are created.

The bulk import function relies on a bibliographic duplicate detection profile. An existing duplicate detection profile may be used, but a new duplicate detection rule may be necessary for use with EOD if vendor bibliographic records do not have a standard control number the MARC 035a field. If a different match point, such as a vendor-specific control number in a different MARC field, will need to be used for deduplication, a new profile must be created before the bulk import rule is created. An EOD duplicate detection rule may be shared by several EOD bulk import rules as applicable.

Both the bulk import rules and duplicate detection rules are created in Voyager's System Administration → Cataloging. (See <http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/cat.pdf> for more detailed information).

Creating a new Bibliographic Duplicate Detection Profile (if necessary)

System Administration → Cataloging Bulk → Bibliographic Duplicate Detection Profiles → New

First, enter a unique Profile Name and Code in the Profile tab, and select the appropriate Duplicate Handling value (Add-Conditional is a common choice).

The screenshot shows the Voyager System Administration interface. The main window is titled "Cataloging - Bibliographic Duplicate Detection Profiles". It features a table of profiles and an "Edit" form for a selected profile.

Codes	Names
EODADDC	EOD Conditional
MARCTEST	Marcive test
OCLCADDU	OCLCUnconditional
OCLCBMER	OCLCBMerge
OCLCCON	OCLCConditional

Edit Bibliographic Duplicate Detection Profile:

Profile Name: EOD Conditional **Profile Code:** EODADDC

Duplicate Handling:

Add-Unconditional Replace Add-Conditional Merge Bi-Directional Merge

Discard incoming records that do not match existing records

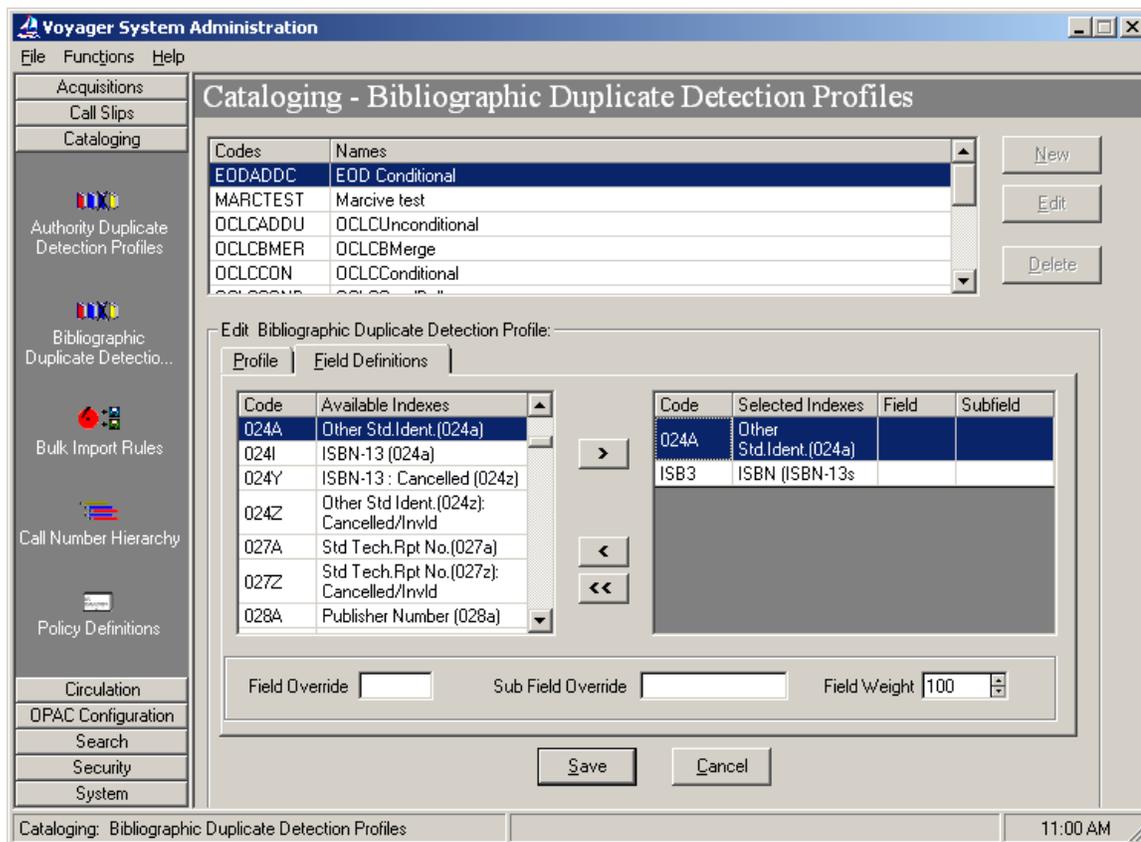
Cancellation:

None OCLC RLIN

Duplicate Replace: 100 Duplicate Warn: 10

Buttons: Save, Cancel

Next, in the Field Definitions tab, identify the field/subfield combination(s) that will contain the number(s) to be used for duplicate detection:



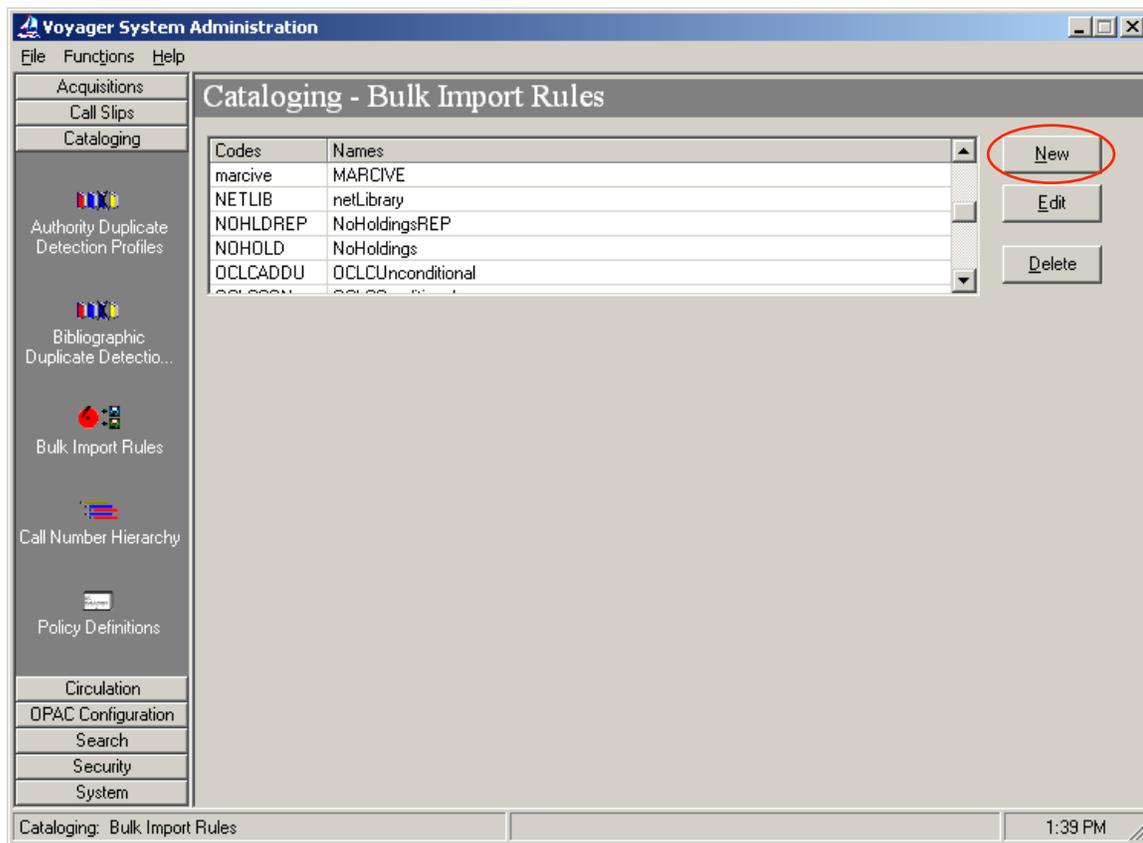
In the example profile above, the 024a is the vendor's "order key" (i.e., vendor number) and will work as a match point on any new records and electronic invoicing. In addition, this library has chosen to match on ISBNs, using the ISB3 index which treats ISBN-10 and ISBN-13 the same for duplicate detection.

Creating a New Bulk Import Rule

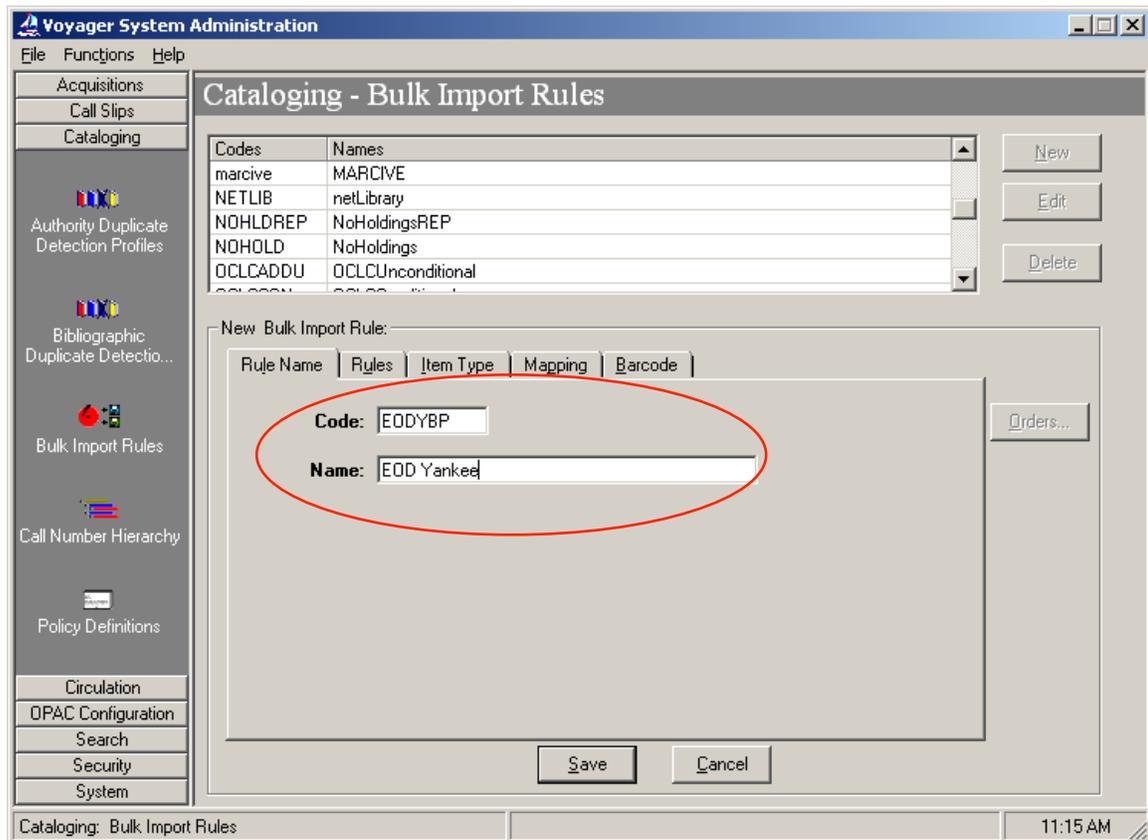
NOTE: Bulk import rules for EOD require data entry on at least four areas: Rule Name, Rules, Mapping tab, and the Orders button. You will not be able to Save the new rule until all of these areas are edited. The other areas are optional, depending on whether item records are created at the time of the load.

Start by clicking the New button at:

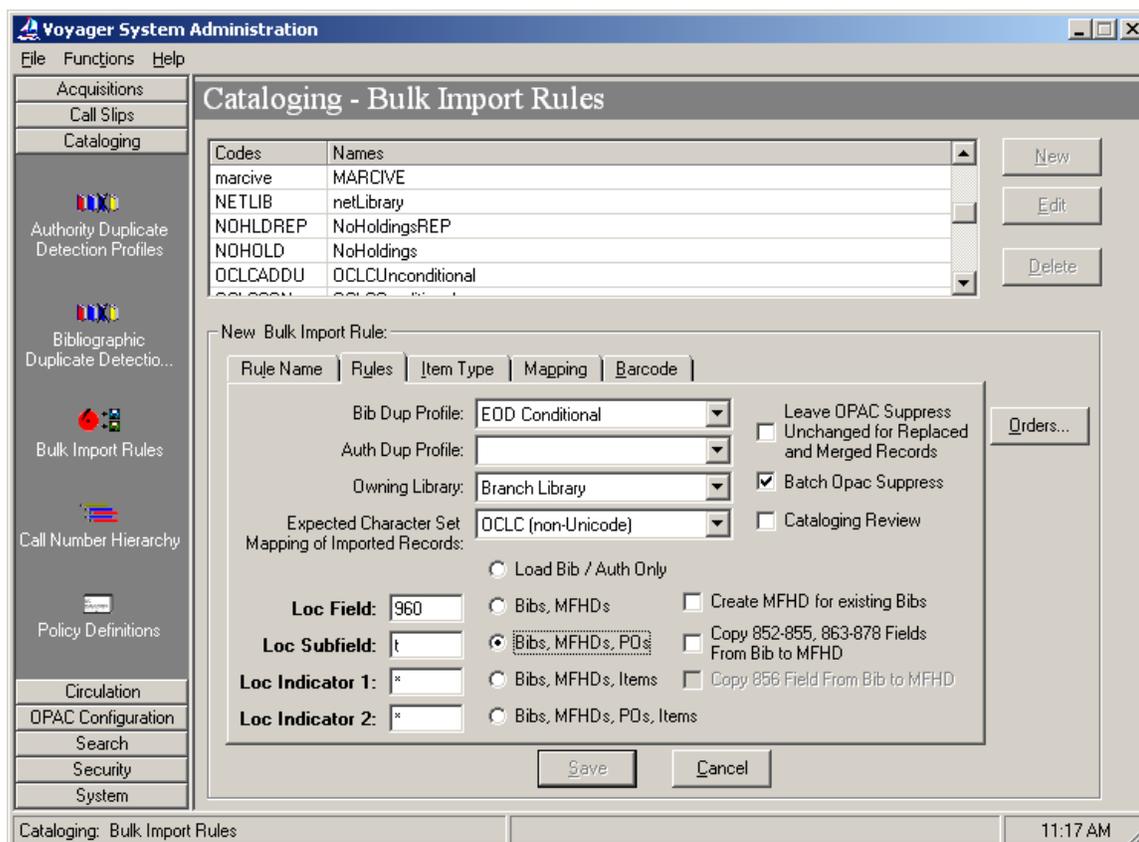
System Administration → Cataloging → Bulk Import Rules → New



On the Rule Name tab, enter a unique Code and Name for the new Bulk Import Rule. Then click the Rules tab.



Rules Tab



Assign the desired “Bib Dup Profile” for use with this EOD-related Bulk Import rule.

Assign the “Owning Library” as appropriate.

Assign the “Expected Character Set Mapping of Imported Records” according to the type of records the vendor will be providing (usually either “MARC21 UTF-8” if the records are in Unicode or “OCLC (non-Unicode)” if they are not).

Change the radio button for the type of the rule to “Bibs, MFHDs, POs” or “Bibs, MFHDs, POs, Items” as desired.

Input the field and subfield in the MARC record where the location code will be found in “Loc Field”, “Loc Subfield”, “Loc Indicator 1”, and “Loc Indicator 2”. These must be negotiated with the vendor; the values here are just examples.

Some libraries choose the “Batch OPAC Suppress” option so that the short/order bibliographic records are automatically suppressed in the library’s local catalog, and consequently do not appear in the I-Share union catalog (UC). This will enable the library to safely replace the short/order bibs with full records at a later time in the local catalog and have the full records safely sent to the UC. The OPAC Suppression is automatically lifted with the record is replaced. For more information about safe bibliographic replacement routines please see the document available at <http://www.carli.illinois.edu/sites/files/i-share/documentation/safebibrep.pdf>.

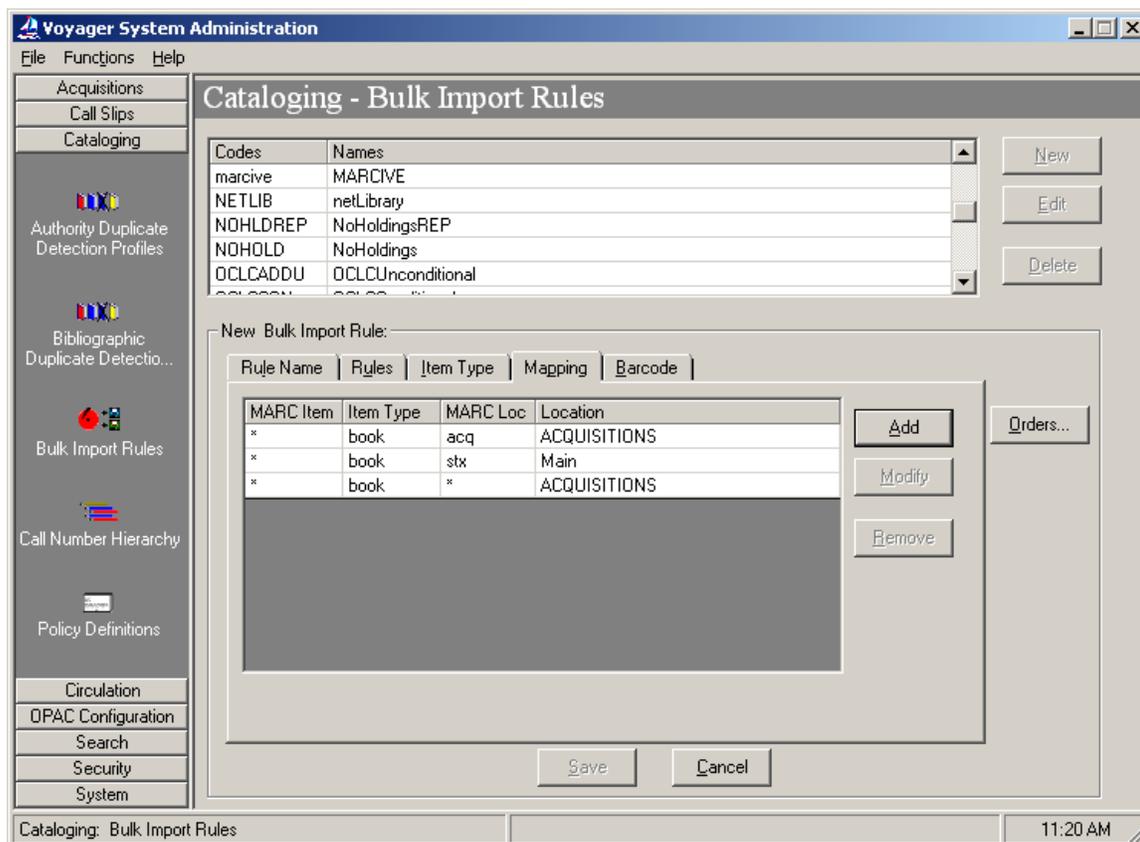
Alternatively, if a library wishes to make the bib immediately available in its local public catalog, but not appear in the I-Share union catalog, the library may wish to ask the vendor to include the text “nouc” (without the quotes) in an 049 \$u. This workflow also allows for safe overlay of the short/order records with full records at a later time so that the full records are safely sent to the UC. For more information about using the 049 \$u option, see <http://www.carli.illinois.edu/products-services/i-share/acq/uc-suppr-049u>.

Check boxes to enable other options as desired. After you have entered all data on this tab, click either the Item Type tab (if item records are to be created) or the Mapping tab to continue.

Item Type Tab

Do not add information to the Item Type tab unless the type of rule chosen includes the option to create items. If your rule is designed to add item records, this tab is where you identify the MARC field/subfield that contains the item type code.

Mapping Tab



Voyager requires this tab, even if item records are not created as part of the bulk import rule. At minimum, this tab must contain a “default” entry for:

MARC Item	Item Type	MARC Loc	Location
*	[your choice]	*	[your choice]

If the bulk import process will create items, the MARC Item value and MARC Location value used in the MARC records must be negotiated with the vendor and defined in this tab. These MARC values

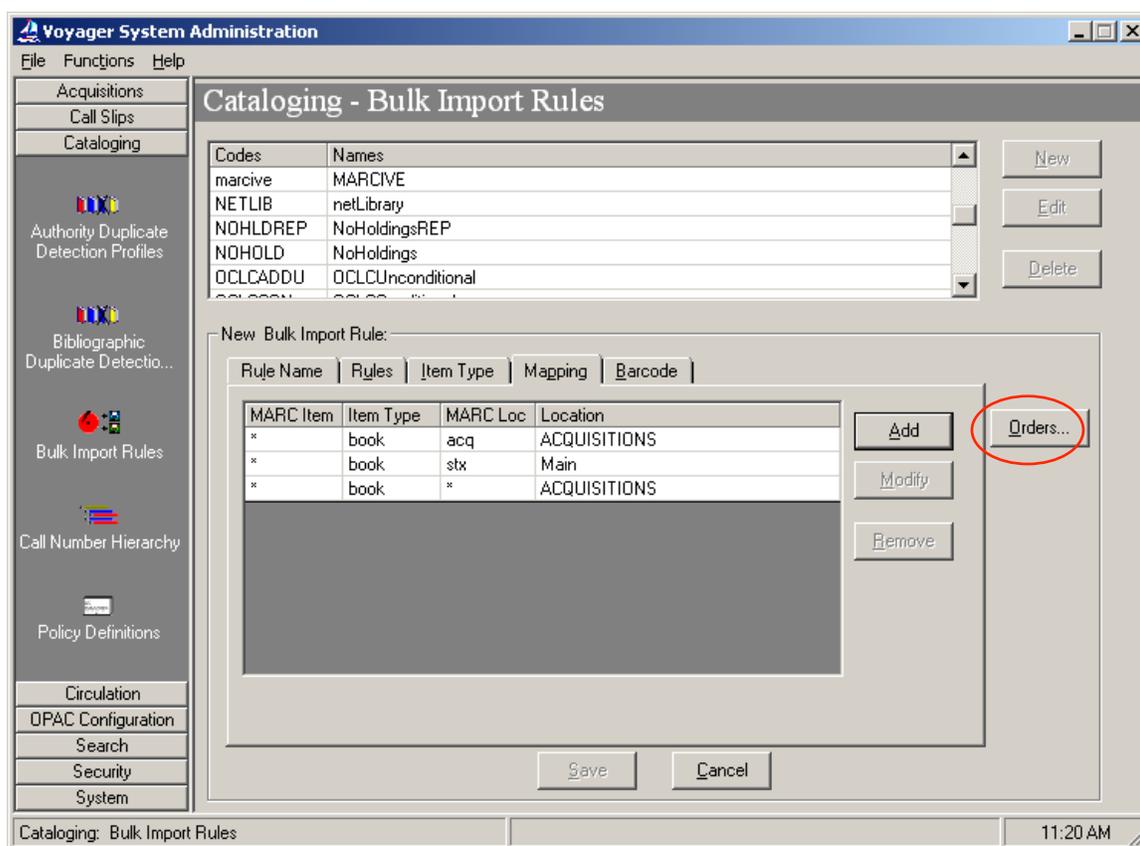
are then translated into your desired Voyager item types and Voyager locations during the bulk import process. This table must contain every potential combination of location/item types that will appear on your orders as well as the “default” entry described above to catch anything that does not match a combination. The “default” entry must be the last row in the mapping table, and it must contain asterisks in both the MARC Item and MARC Location fields. Bulk import will begin at the top of the list and work its way down, finding or not finding matching location/item type combinations to map. Voyager will not allow you to save a bulk import rule that lacks the “default” row; the Save button will remain grayed out until this “default” row has been added to the mapping table.

After you have created the Mapping table, click on the Orders button to continue.

Orders Button

Define the purchase order information to be created by the bulk import.

From any tab on the Bulk Import Rule definition screen, click on the Orders box in the middle right of the display.



Many vendors will have a “typical” setup for the MARC field/subfield/indicators of the Fund, Price, Copy, Notes, Instructions, Vendor Title, and Piece ID that they will provide to you. Usually, these can be negotiated, if needed.

Libraries must define at least the bolded fields before the Order Settings window can be closed. These include the Order Location, Order Type, Line Item Type Default, Vendor Code, Currency, and Fund Default Code values.

Pay careful attention to data that are case sensitive, such as fund codes, locations, etc.

IV. CARLI’s Role in EOD Processing (once testing is complete)

1. A batch job runs at approximately 7:00 a.m. each morning to check if a new EOD file is present in your library’s /xxxftp/upload/eod/ directory on the CARLI Files server and therefore ready to be loaded into Voyager. If a library would prefer a different time of day, it can be specified on the WRO that is filed to begin EOD processing.
NOTE: The retrieval, renaming, and moving of the EOD file from the vendor’s server to your library’s xxxftp directory on the CARLI server is the responsibility of the library. You must use ASCII, not binary, mode when copying files to the CARLI server.
2. If a new file is available, the incoming file is copied to the production server and loaded via the designated bulk import rule you have identified/created for this purpose.

IMPORTANT: The file in the /xxxftp/upload/eod directory must include, as part of its name, some indication of which bulk import rule is to be used (e.g., appr, frm, main, brnch, or some other naming convention that will distinguish among different bulk import rules).

3. The log of the bulk import process, plus any “replace,” “discard,” or “reject” files are copied to your library’s /xxxftp/upload/ directory on the Files server.
4. The file is renamed to [filename].done so that the batch process doesn’t attempt to process it a second time.
5. See http://www.carli.illinois.edu/sites/files/i-share/documentation/edi_and_eod_walkthrough.pdf (second page) for a graphical view of the file transfer process.

IV. Example of *one library’s* workflow for EOD Orders

1. Move file(s) from vendor’s server to a local computer
2. Rename the file(s)
3. Move the file(s) to /xxxftp/upload/eod/ on the Files server (where xxx is the I-Share 3-letter code for your library)
4. Once CARLI has processed the file, download bulk import logs from /xxxftp/upload/ on the Files server to a local computer
5. Resolve any “reject” records (i.e., bibliographic record was not loaded)
6. Resolve any “discard” records (i.e., bibliographic record was loaded, but line item was not added to the purchase order)
7. For firm orders: approve the purchase order
8. For approvals: delete rejected line items, MFHD’s, and bib records