

# Acquisitions Rodeo Pt. 2: EDI Set Up

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# What is EDI?

- EDI (Electronic Data Interchange)
- Computer to computer exchange of formatted messages
  - Allows Evergreen and vendor ordering systems to communicate

# What does EDI allow me to do in Evergreen?

- Send a Purchase Order to vendor from within Evergreen
  - Sent automatically when a purchase order is activated
- Receive EDI messages from vendor about status of ordered materials
- Receive EDI invoices from vendor directly in Evergreen

# Staff Client Set Up for EDI Ordering

- Organizational Unit
  - Admin > Server Administration > Organizational Units
- Providers
  - Admin > Server Administration > Acquisitions > Providers
- EDI Accounts
  - Admin > Server Administration > Acquisitions > EDI Accounts
- EDI Messages
  - Admin > Server Administration > Acquisitions > EDI Messages
  - No setup needed

# EDI Accounts

- Admin > Server Administration > Acquisitions > EDI Accounts

Go Back **Reload** Go Forward Debug [Print Page](#)

## EDI Accounts

[New Account](#) [Delete Selected](#)

[Back](#) [Next](#) [Filter](#)

✓	#	Label	Host	Username	Password	Account	Owner	Last Activity	Provider	Path	Incoming Directory	Vendor Account Number	Vendor Assigned Code
<input type="checkbox"/>	1	Children's DVD	http://library.com	vendoradmin	vendoradmin		APEX		<a href="#">15</a>				
<input type="checkbox"/>	2	Geology	www.library.com	admin	admin		APEX		<a href="#">15</a>				

Host is the full FTP/SSH hostname, including the protocol, e.g. ftp://ftp1.somevendor.com  
Username, Password and Account are (s)FTP/SSH parameters.  
Account is unlikely to be used by modern systems and should typically be empty.  
Vendor Account Number (VAN) is vendor-assigned, only needed if different than the org\_unit SAN.  
Vendor Assigned Code (VAC) is essentially a sub-account designation, e.g. '0001'. It can be used with or without VAN.  
The location of codes in the EDI message itself may vary according to vendor-specific semantics.

# EDI Account Set up

Go Back   Reload   Go Forward   Debug   Print Page

## EDI Accounts

[Back](#)   [Next](#)   [Filter](#)

✓	#	Label	Host	Username
<input type="checkbox"/>	1	Children's DVD	http://libra	vendor

Host is the full FTP/SSH hostname, including the Username, Password and Account are (s)FTP/ Account is unlikely to be used by modern system Vendor Account Number (VAN) is vendor-assigned Vendor Assigned Code (VAC) is essentially a sub The location of codes in the EDI message itself

New Account   Delete Selected

Incoming Directory	Vendor Account Number	Vendor Assigned Code

Label	APEX BT EDI
Host	ftp://ftp.baker-taylor.com
Username	123456
Password	123456
Account	123456 8521 3695
Owner	APEX
Last Activity	
Provider	BT013
Path	123456.IN/*.EPO
Incoming Directory	123456.OUT
Vendor Account Number	123456
Vendor Assigned Code	001
Cancel	Save

- Check for trailing spaces!
- Host needs to have ftp:// before FTP hostname

# EDI Account Set up

- EDI Account ID- assigned automatically by Evergreen
- Label- name of account. Should be a recognizable name
- Host- vendor server where EDI files will be sent
- Username- assigned by vendor
- Password- assigned by vendor
- Account- assigned by vendor
- Owner- which org units can use this EDI Account
- Last Activity- updated automatically by activity on account
- Path- EDI files from Evergreen go to the Path (on the vendor's server)
- Incoming Directory- EDI files from the vendor are placed in the Incoming Directory for Evergreen to pick up
- Vendor Account Number- optional
- Vendor Assigned Code- optional

# EDI Messages

Admin > Server Administration > Acquisitions > EDI Messages

Go Back			Reload			Go Forward			Debug			Print Page		
EDI Messages														
<a href="#">Back</a> <a href="#">Next</a> <a href="#">Filter</a>														
✓	#	Purchase Order	Message Type	Status	Time Created	Time Translated	Time Processed	Time of Error	Error	EDI Account	Filename			
<input type="checkbox"/>	1	10	INVOIC	processed	1/21/15 3:07 AM	1/21/15 3:07 AM				Baker and Taylor	426886L.out/C			
<input type="checkbox"/>	2	10	ORDRSP	processed	1/15/15 3:56 PM	1/15/15 3:56 PM				Baker and Taylor	426886L.out/C			
<input type="checkbox"/>	3	10	ORDERS	complete	1/15/15 3:45 PM	1/15/15 3:45 PM	1/15/15 3:45 PM			Baker and Taylor	426886L.in/o4			
<input type="checkbox"/>	4	9	ORDRSP	processed	1/15/15 2:42 PM	1/15/15 2:42 PM				Baker and Taylor	426886L.out/C			
<input type="checkbox"/>	5	9	ORDERS	complete	1/15/15 2:30 PM	1/15/15 2:30 PM	1/15/15 2:30 PM			Baker and Taylor	426886L.in/3G			

# Organizational Units

- Library's SAN needs to be entered in the **Mailing Address** to identify the library in EDI messages

The screenshot displays a web application interface for managing Organizational Units. On the left, a tree view shows the hierarchy: Organizational Units > CONS: Equinox Consortium > CASEY: Casey Library System > APEX: Apex Branch. The main content area shows the 'Addresses' tab for the selected unit. The 'Mailing Address' sub-tab is active, and the 'SAN' field is highlighted with a red box, containing the value '999990'. Other fields include 'Type' (MAILING), 'Street 1' (123 Main St.), 'City' (Anywhere), 'State' (GA), 'Zip' (30303), and 'Country' (US). A 'Save' button is located at the bottom left of the form.

Field	Value
Type	MAILING
Valid	<input checked="" type="checkbox"/>
Street 1	123 Main St.
Street 2	
City	Anywhere
State	GA
Zip	30303
Country	US
County	
SAN	999990

# Provider- EDI Set Up

Go Back   Reload   Go Forward   Debug   Print Page

Active	<input checked="" type="checkbox"/>	Code	BT013
Currency	US Dollars	Default # Copies	0
Default Claim Policy		EDI Default	Children's DVD
Email	info@bakertaylor.com	Fax Phone	
Holdings Tag	945	Owner	APEX
Phone		Prepayment Required	<input type="checkbox"/>
Provider ID	15	Provider Name	BAKER & TAYLOR
SAN	9876543	URL	www.bakertaylor.com

Cancel   Save

Provider Address   Provider Contact   Attribute Definitions   Holding Subfield   Invoices

**Holding Subfield**   New Holding Subfield   Delete Selected

✓	#	Provider	Name	Subfield	
<input type="checkbox"/>	1	BT013	barcode	b	
<input type="checkbox"/>	2	BT013	call_number	c	
<input type="checkbox"/>	3	BT013	circ_modifier	t	
<input type="checkbox"/>	4	BT013	copy_location	a	
<input type="checkbox"/>	5	BT013	estimated_pri	p	
<input type="checkbox"/>	6	BT013	fund_code	s	
<input type="checkbox"/>	7	BT013	owning_lib	l	

# Provider- EDI Set Up

- SAN- Vendor's SAN
- EDI Default- select EDI Account from drop down menu. This is the account that will be used when ordering from this vendor.
  - Only select an EDI Default if the library will be placing orders through EDI
  - If you are part of a consortium, be sure you are selecting the correct EDI Account
    - Develop a naming schema that easily identifies which library an account belongs to

# Provider Code and Name Requirements

- Baker & Taylor- Code needs to be 'BT' *or* Provider Name needs to start with 'BAKER & TAYLOR'
  - If library uses multiple Provider accounts for Baker & Taylor:
    - Code: BTMAIN; Name: BAKER & TAYLOR MAIN
    - Code: BTSOUTH; Name: BAKER & TAYLOR SOUTH
- Ingram- Code and Name need to be 'INGRAM'
- Brodart- Code and Name need to be 'BRODART'
- These requirements are from the PO JEDI Notification/Action Trigger template [\*earlier versions of Evergreen did not have these requirements. This is based on 2.7.]

# Provider- Holdings Set Up

Go Back   Reload   Go Forward   Debug   Print Page

Active    Code BT013

Currency US Dollars   Default # Copies 0

Default Claim Policy   EDI Default Children's DVD

Email info@bakertaylor.com   Fax Phone

**Holdings Tag 945**   Owner APEX

Phone   Prepayment Required

Provider ID 15   Provider Name BAKER & TAYLOR

SAN 9876543   URL www.bakertaylor.com

Cancel   Save

Provider Address   Provider Contact   Attribute Definitions   **Holding Subfield**   Invoices

**Holding Subfield**   New Holding Subfield   Delete Selected

✓	#	Provider	Name	Subfield
<input type="checkbox"/>	1	BT013	barcode	b
<input type="checkbox"/>	2	BT013	call_number	c
<input type="checkbox"/>	3	BT013	circ_modifier	t
<input type="checkbox"/>	4	BT013	copy_location	a
<input type="checkbox"/>	5	BT013	estimated_pri	p
<input type="checkbox"/>	6	BT013	fund_code	s
<input type="checkbox"/>	7	BT013	owning_lib	l

# Providers- Holdings Set Up

- Holdings Tag- MARC tag in which the vendor will put holdings/item information
  - Only needed if the library is receiving holdings in the order records
- Holdings Subfields
  - Quantity\*
  - Estimated Price\*\*
  - Owning Library\*\*
  - Call Number\*\*
  - Fund Code\*\*
  - Circ Modifier
  - Note
  - Shelving Location
  - Barcode
  - Collection Code

```

=LDR 01958cam 2200505 a 4500
=001 ocn778314690
=003 OCoLC
=005 20121115221046.0
=008 120224s2012\\nyu\\000\\1\\eng\\
=010 \\$a 2012005381
=020 \\$a0062065246 (hbk.)
=020 \\$a9780062065247 (hbk.)
=020 \\$a0062213873
=020 \\$a9780062213877
=050 00$aPS3555.R42$bR68 2012
=082 00$a813/.54$223
=084 \\$aFIC000000$2bisacsh
=049 \\$aEQNX
=100 1\\$aErdrich, Louise.
=245 14$aThe round house /$cLouise Erdrich.
=250 \\$a1st ed.
=260 \\$aNew York :$bHarper,$cc2012.
=945 \\$e2$p20.00$IAPEX$sNR$tBook
=945 \\$e1$p20.00$ICAS-MAIN$sNR$tBook
=994 \\$aC0$bEQNOX

```

### Holding Subfield

✓	#	Provider	Name	Subfield	
<input type="checkbox"/>	1	BT013	barcode	b	
<input type="checkbox"/>	2	BT013	call_number	c	
<input type="checkbox"/>	3	BT013	circ_modifier	t	
<input type="checkbox"/>	4	BT013	copy_location	a	
<input type="checkbox"/>	5	BT013	estimated_pri	p	
<input type="checkbox"/>	6	BT013	fund_code	s	
<input type="checkbox"/>	7	BT013	owning_lib	l	
<input type="checkbox"/>	8	BT013	quantity	e	

# Server Side Set Up for EDI

- Install `edi_webrick.bash`
- Install the `edi_pusher.pl` and `edi_fetcher.pl` scripts and add them to the crontab
- Activate PO JEDI Action Trigger event
  - Admin > Local Administration > Notification/Action Triggers
- Thank you to Dale Rigney, Equinox Support Specialist, for this information!

# Action Triggers

Admin > Local Administration > Notification/Action Triggers

Go Back   Reload   Go Forward   Debug   Print Page

Event Definitions   Hooks   Reactors   Validators

### Trigger Event Definitions

[Back](#)   [Next](#)   [Filter](#)        

✓	#	Owning Library	Name	Hook	Enabled	Processing Delay	Processing Delay Context Field	Processing Group Context Field	Reactor	Validator	Event Repeatability Delay	Granularity
<input type="checkbox"/>	1	CONS	<a href="#">PO HTML</a>	format.po.html	True	00:05:00			ProcessTemplate	NOOP_True		
<input type="checkbox"/>	2	CONS	<a href="#">PO JEDI</a>	acqpo.activated	True	00:00:00			GeneratePurchase	Acq::PurchaseOr		
<input type="checkbox"/>	3	CONS	<a href="#">Password reset request notification</a>	password.reset_r	False	00:00:01			SendEmail	NOOP_True		
<input type="checkbox"/>	4	CONS	<a href="#">Print Output for Import Items from Queued Bib Records</a>	vandelay.import_i	True	00:05:00		record.queue.owr	ProcessTemplate	NOOP_True		print-on-demar
<input type="checkbox"/>	5	CONS	<a href="#">Print Output for Queued Authority Records</a>	vandelay.queued_	True	00:05:00		queue.owner	ProcessTemplate	NOOP_True		print-on-demar
<input type="checkbox"/>	6	CONS	<a href="#">Print Output for Queued Bib Records</a>	vandelay.queued_	True	00:05:00		queue.owner	ProcessTemplate	NOOP_True		print-on-demar
<input type="checkbox"/>	7	CONS	<a href="#">SMS Call Number</a>	acn.format.sms_	True	00:05:00			SendSMS	NOOP_True		
<input type="checkbox"/>	8	CONS	<a href="#">Self-Checkout Fines Receipt</a>	format.selfcheck.	True	00:05:00			ProcessTemplate	NOOP_True		print-on-demar
<input type="checkbox"/>	9	CONS	<a href="#">Self-Checkout Holds Receipt</a>	format.selfcheck.	True	00:05:00		usr	ProcessTemplate	NOOP_True		print-on-demar
<input type="checkbox"/>	10	CONS	<a href="#">Self-Checkout Items Out Receipt</a>	format.selfcheck.	True	00:05:00		usr	ProcessTemplate	NOOP_True		print-on-demar
<input type="checkbox"/>	11	CONS	<a href="#">Self-Checkout Receipt</a>	format.selfcheck.	True	00:05:00		usr	ProcessTemplate	NOOP_True		print-on-demar
<input type="checkbox"/>	12	CONS	<a href="#">Telephone Overdue Notice</a>	checkout.due	False	00:00:05	due_date	usr	AstCall	NOOP_True		
<input type="checkbox"/>	13	CONS	<a href="#">ahr.history.email</a>	ahr.format.history	True	00:05:00		usr	SendEmail	NOOP_True		

# Action Triggers

- Make sure Trigger Event is “Enabled”

Go Back   Reload   Go Forward

Event Definitions   Hooks   Reactors   Validators

### Trigger Event Definitions

[Back](#)   [Next](#)   [Filter](#)

Owning Library	CONS
Name	PO JEDI
Hook	acqpo.activated
Enabled	<input checked="" type="checkbox"/>
Processing Delay	00:00:00
Processing Delay Context Field	
Processing Group Context Field	
Reactor	GeneratePurchaseOrderJt
Validator	Acq::PurchaseOrderEDIR
Event Repeatability Delay	
Definition ID	23
Failure Cleanup	
Granularity	
Max Event Validity Delay	
Opt-In Setting Type	

# Basic Acquisitions Workflow

- Create order on vendor website
  - Holdings subfields and values configured on vendor website
- Download order records from vendor
- Upload order records in Acquisitions > Load MARC Order Record to create a purchase order
- Activate PO in Evergreen to send PO via EDI to vendor

# Acquisitions > Upload MARC Order Records

Go Back   Reload   Go Forward

Create Purchase Order

Activate Purchase Order

Provider

Context Org Unit

Add to Selection List

Fiscal Year

---

Upload to Queue  Or create a new queue

Record Match Set

Merge Profile

Import Non-Matching Records  Record Source

Merge On Exact Match (901c)

Merge On Single Match

Merge On Best Match

Best/Single Match Minimum Quality Ratio  New Record Quality / Quality of Best Match

Insufficient Quality Fall-Through Profile

Load Items for Imported Records

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File to Upload:

# Purchase Order after Upload

Go Back   Reload   Go Forward   Debug   Print Page

Purchase Order (pending)  
ID 322   Prepayment Required? No

Name [322](#)   **Activatable?** Yes. [Activate Order](#) / [Activate Without Loading Items](#)

Provider [BAKER & TAYLOR \(BT013\)](#)   Notes [\(0\)](#)

Total Lineitems 2   EDI Messages [\(0\)](#)

Total Estimated \$109.75   History [View](#)

Total Encumbered \$0.00

Total Spent \$0.00

Allow activation with zero-copy lineitems

[Split Order by Lineitems](#)

--Actions--

Copies   Owning Branch   Copy Location   Collection Code   Fund   Circ Modifier   Distribution Formula

                 OR      [Apply to Selected](#)

✓ **Line Items**   [Expand All](#) Items   Notes   Actions   Status   Estimated Price

<input type="checkbox"/>	<a href="#">All the light we cannot see : a novel / Anthony Doerr.</a> Doerr, Anthony, 1973- 1476746591 First Scribner hardcover edition. BT013	<a href="#">Expand</a>	<a href="#">Copies(2)</a>	<a href="#">Notes(0)</a>	-- Actions --	Pending-Order	21.95
	Order Identifier ISBN   1476746591						
# 2292	<a href="#">link to catalog</a>   <a href="#">worksheet</a>   <a href="#">requests</a>   <a href="#">view invoice(s)</a>   <a href="#">queue</a>						
	<a href="#">The bone clocks : a novel / David Mitchell.</a> Mitchell, David 1400065674 First edition. BT013						

# Activate PO

Go Back   Reload   Go Forward

Purchase Order (pending)  
ID 322      Prepayment Required? No

Name [322](#)      Activatable? Yes.   [Activate Order](#) / [Activate Without Loading Items](#)

Provider [BAKER & TAYLOR \(BT013\)](#)      Notes [\(0\)](#)

Total Lineitems 2      EDI Messages [\(0\)](#)

Total Estimated \$109.75      History [View](#)

Total Encumbered \$0.00

Total Spent \$0.00

Allow activation with zero-copy lineitems

[Split Order by Lineitems](#)

---

Upload to Queue      Or create a new queue

Record Match Set  

Merge Profile  

Import Non-Matching Records      Record Source

Merge On Exact Match (901c)  

Merge On Single Match  

Merge On Best Match  

Best/Single Match Minimum Quality Ratio    New Record Quality / Quality of Best Match

Insufficient Quality Fall-Through Profile

# Activated PO with EDI messages

Go Back   Reload   Go Forward   Debug   Print Page

Purchase Order (on-order) Activated 1/15/15 3:43 PM

ID	10	Prepayment Required?	No
Name	<a href="#">10</a>	Activatable?	Activated
Provider	<a href="#">Baker &amp; Taylor</a>	Notes	(0)
Total Lineitems	1	<b>EDI Messages</b>	<b>(3)</b>
Total Estimated	\$28.86	History	<a href="#">View</a>
Total Encumbered	\$0.00	Invoicing	<a href="#">View Invoices (1)</a> <a href="#">Create Invoice</a> <a href="#">Link Invoice</a> ▾
Total Spent	\$28.86	Cancel	<a href="#">Cancel order</a> ▾

--Actions-- ▾

Copies	Owning Branch	Copy Location	Collection Code	Fund	Circ Modifier	Distribution Formu
<input type="text"/>	<input type="text"/> ▾	<input type="text"/> ▾	<input type="text"/>	<input type="text"/> ▾	<input type="text"/> ▾	OR <input type="text"/>

✓ Line Items	<a href="#">Expand All</a> Items	Notes	Actions	Status	Estimated Price	
<input type="checkbox"/>	<a href="#">Paw and order : a Chet and Bernie mystery / Spencer Quinn.</a> Quinn, Spencer. 1476703396 First Atria Books hardcover edition. B&T	<a href="#">Expand</a>	<a href="#">Copies(2)</a> <a href="#">Notes(0)</a>	<input type="text" value="-- Actions --"/> ▾	on-order	14.43
	Order Identifier	ISBN ▾	<input type="text" value="1476703396"/> ▾			

# 9 | [→ catalog](#) | [↻ worksheet](#) | [requests](#) | [view invoice\(s\)](#) | [↻](#)

# Activated PO with EDI messages

✓	#	Message Type	Status	Time Created	Time Translated	Time Processed	Time of Error	Error	EDI Account	Filename
<input type="checkbox"/>	1	INVOIC	processed	1/21/15 3:07 AM	1/21/15 3:07 AM				Baker and Taylor	426886L.out/OL
<input type="checkbox"/>	2	ORDRSP	processed	1/15/15 3:56 PM	1/15/15 3:56 PM				Baker and Taylor	426886L.out/OL
<input type="checkbox"/>	3	ORDERS	complete	1/15/15 3:45 PM	1/15/15 3:45 PM	1/15/15 3:45 PM			Baker and Taylor	426886L.in/o4Y

[Go Back](#)[Re|oad](#)[Go Forward](#)

Debug

[Print Page](#)

## EDI Messages (Purchase Order 10)

[Back](#) [Next](#) [Filter](#)

**Message Type** ORDERS

**Status** complete

**Time Created** 1/15/15 3:45 PM

**Time Translated** 1/15/15 3:45 PM

**Time Processed** 1/15/15 3:45 PM

**Time of Error**

**Error**

**EDI Account** Baker and Taylor

**Filename** 426886L.in/o4Yp3Laqxw

**EDI Message** UNA:+?

**Body** 'UNB+UNOB:3+426886L:31B+1556150:31B+150115:1645+1'UNH+1+ORDERS:D:96A:UN'BGM+220+10+9'DTM+137:20150115:102'NAD+{ and order ? : a Chet and Bernie m:ystery / Spencer Quinn.'IMD+F+BPU'IMD+F+BPD'IMD+F+BPH+:::304 pages :QTY+21:2'FTX+LIN+1'PR

**EDI Message ID** 4

**JEDI Message Body** { "recipient": "1556150", "sender": "426886L", "body": [ { "ORDERS": [ "order", { "po\_number": 10, "date": "20150115", "buyer": [ { "id": "426886L", "id-qualifier": "IB", "id": "1476703396" }, { "id-qualifier": "IN", "id": "9" } ], "price": 14.43, "desc": [ { "BTI": "Paw and order : a Chet and Bernie myster

# EDI invoice and receive items

- Will appear automatically under Acquisitions > Open Invoices or use Acquisitions > General Search

The screenshot shows a web application interface for searching acquisitions. At the top, there are navigation buttons: 'Go Back', 'Reload', and 'Go Forward'. On the right side of this bar are 'Debug' and 'Print Page' buttons. Below this is the 'Acquisitions Search' section, which includes a 'Hide Search Form' button. The search criteria are displayed as follows: 'Search for invoices' (selected from a dropdown), 'matching all' (selected from a dropdown), and 'of the following terms:'. Below this, a search term is defined: 'I - Receive Method' (selected from a dropdown), 'is' (selected from a dropdown), and 'EDI' (entered in a text field). To the right of this term is a red 'X' button. Below the search term is an 'Add Search Term' button. At the bottom left of the search area is a 'Search' button. A dashed horizontal line is visible below the search area.

# General Search

Go Back			Reload			Go Forward			Debug			Print Page
<b>Acquisitions Search</b>											Reveal Search Form	
Refresh Grid			Print Selected Invoices									
<a href="#">Back</a> <a href="#">Next</a> <a href="#">Filter</a>												
✓	#	Vendor Invoice ID	Receiver	Provider	Shipper	Complete	Invoice Date	Invoice Type	Note	Payment Auth	Payment Method	Receive Method
<input type="checkbox"/>	1	<a href="#">3020046377</a>	APEX	BT013	BT013	False	1/19/15 11:00 PM		Generated from acq.edi_mes #6.			EDI

# EDI Invoice

Debug

**Invoice**

Lineitems: 2

Expected Cost: 57.72

Vendor Invoice ID  Invoice Date   
 Receive Method  Invoice Type   
 Provider  Shipper   
 Note  Payment Auth   
 Payment Method  Receiver

**Bibliographic Items**

Title Details	# Invoiced / # Paid	Billed	Per Copy	Paid	Detach
<a href="#">Paw and order : a Chet and Bernie mystery / Spencer Quinn., by Quinn, Spencer. (1476703396)</a> 2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled Estimated \$28.86, Encumbered \$0.00, Paid \$28.86 # 9 <a href="#">10 1/15/15</a>	<input type="text" value="2"/> / <input type="text" value="2"/>	<input type="text" value="28.86"/>	14.43	<input type="text" value="28.86"/>	<a href="#">Detach</a>

Questions?

# Next Steps...

- Full Cataloging
- Pre-processed materials
  - Upload bibliographic records from vendor
  - Holdings- call number, barcode, etc.
- Copy Overlay
  - Overlay on order items that were created when the purchase order was activated
  - 2 Options
    - Copy ID
    - Auto-overlay

# Copy ID Overlay

- Configure Holdings Import Profile in Cataloging > MARC Batch Import/Export > Holdings Import Profile
- Overlay Match ID- lineitem\_detail (ACQ copy) ID needs to be added to EDI Order message. Vendor then places that ID in the designated holdings subfield to facilitate overlay when imported.

Go Back | Reload | Go Forward | Debug | Print Page

Export Records | Import Records | Inspect Queue | Record Display Attributes | Merge / Overlay Profiles | Record Match Sets | **Holdings Import Profiles**

**Holdings Import Profiles** New Definition Delete Selected

Context Org Unit: APEX

[Back](#) [Next](#) [Filter](#)

✓	#	Alert Message	Barcode	Call Number	Circulate	Circulate As MARC Type	Circulating Library	Circulation Modifier	Copy Number	Deposit	Deposit Amount	Holdable	Keep	Name	OPAC Visible	Overlay Match ID
<input type="checkbox"/>	1		b	c			d						False	Catalog Holdings Import		q
<input type="checkbox"/>	2		p	j	[@code = "x" and text() = "circulating"]		[@code = "b"][2]	g	t			[@code = "x" and text() = "holdable"]	False	Evergreen 852 export format	[@code = "x" and text() = "visible"]	
<input type="checkbox"/>	3		i	a				t					False	Unicorn Import format -- 999		

# Copy ID Overlay

- Upload bibliographic MARC records in Cataloging > MARC Batch Import/Export > Import Records
- Use Acquisitions Record Type

Go Back

Reload

Go Forward

Export Records

Import Records

Inspect Queue

Record Display Attributes

Merge / Overlay Profiles

Record Match Sets

Holdings Import Profiles

## Evergreen MARC File Upload

Record Type

Create a New Upload Queue

or Add to an Existing Queue

Record Match Set

Limit matches to bucket

Holdings Import Profile

Select a Record Source

### Record Import Actions

Merge Profile

Import Non-Matching Records

Merge On Exact Match (901c)

Merge On Single Match

Merge On Best Match

Best/Single Match Minimum Quality Ratio  New Record Quality / Quality of Best Match

Insufficient Quality Fall-Through Profile

### Copy Import Actions

Auto-overlay In-process Acquisitions Copies

# Auto-overlay In-process Acquisitions Copies

Go Back   Reload   Go Forward

Export Records   Import Records   Inspect Queue   Record Display Attributes   Merge / Overlay Profiles   Record Match Sets   Holdings Import Profiles

## Evergreen MARC File Upload

Record Type: Acquisitions Records

Create a New Upload Queue: 0515 New Fiction   or Add to an Existing Queue:

Record Match Set: ISBN   Limit matches to bucket:

Holdings Import Profile: Catalog Holdings Import

Select a Record Source: oclc

---

### Record Import Actions

Merge Profile: Full Overlay

Import Non-Matching Records:

Merge On Exact Match (901c):

Merge On Single Match:

Merge On Best Match:

Best/Single Match Minimum Quality Ratio: 0.0   New Record Quality / Quality of Best Match

Insufficient Quality Fall-Through Profile:

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### Copy Import Actions

Auto-overlay In-process Acquisitions Copies:

# Auto-overlay In-process Acquisitions Copies

- When the MARC records with embedded holdings information are imported, Evergreen will look for lineitems that are linked to the bibliographic record that matches the record to be imported.
- The lineitems must be in the “In Process” status (received in acq module)
- This feature chooses any eligible copy to overlay.
- Copy ID Overlay selects specific copy to overlay based on lineitem\_detail ID.

Thank you!