

Acquisitions Workflow

at Garfield County Public Libraries

Ordering

One-Click (Quick Click) ordering from
Midwest Tapes and Ingram

Manual orders from Amazon and other
vendors

Place EDI orders

FTP orders to Ingram and Midwest Tapes

Separate Midwest Tapes orders by age range and Ingram orders by branch

Process EDI Order Acknowledgments

I only get EDI acknowledgments from Ingram. Midwest Tapes sends email confirmations.

Post Encumbrances

Duplicate Check

Using Headings Reports, run a duplicate entry search and clear the duplicates.

Load Records--make a list of pending orders

Boolean Search

Review File Name: GARCO orders

Store Record Type: ORDER o

Range: Start: o1200000 Stop: o13314026

Term	Operator	Type	Field	Condition	Value A	Value B
1		o	STATUS	equal to	o	
2	OR	ORDER	RDATE	greater than	08-15-2015	- -

ORDER STATUS equal to "o" OR ORDER RDATE greater than "08-15-2015"

Group
Ungroup
Insert Line
Append Line
Delete
Clear All

Search Use Existing Search Retrieve Saved Query Save Save As Close

Load Records--flip list of orders into list of bibs

Boolean Search Append Use Existing Search Copy Empty

Review File Name:

Store Record Type:

Review Review file:

Term	Operator	Type	Field	Condition	Value A	Value B
1						

Load Records--empty the list of orders and export the list of bibs using data exchange

The screenshot shows the Sierra Marmot Library Network interface. The title bar reads "Sierra - Marmot Library Network - Amy Shipley - GarCo". The menu bar includes "File", "Edit", "View", "Go", "Tools", "Reports", "Admin", "Window", "All Load", and "Help". The main header displays the "sierra" logo and a "FUNCTION" dropdown menu set to "Data Exchange". Below the header is a toolbar with icons for "Load", "View", "Copy", "Delete", "Get FTS", "Get FTS", "Get PC", "Prep P", and "Prep T".

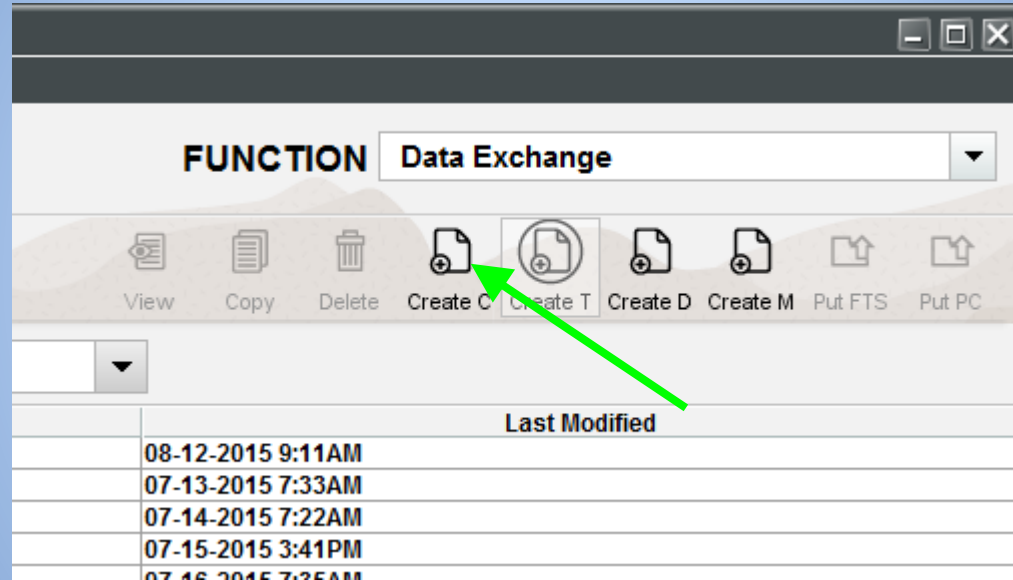
A "Select Process" dropdown menu is open, showing the following options:

- Load Records via a Locally Created Load Profile (local)
- Oneclick Log (click)
- Output MARC records (out)
- Output Order Records (pur)

The main data table is as follows:

File	Name	Type		Last Modified
1	1 Bib records to load gclid HEX_ADB_80446_0831201...	errlog		
2	1 Bib records to load gclid HEX_ADB_80446_0831201...	ifts		
3	1 Bib records to load gclid HEX_ADB_80446_0831201...	lmarc		
4	2015_MARMOT.01.BIB.lmarc	lmarc	380655616	08-16-2015 5:20PM
5	2015_MARMOT.02.BIB.lmarc	lmarc	374161152	08-18-2015 12:06AM
6	2015_MARMOT.03.BIB.lmarc	lmarc	574471424	08-19-2015 11:51PM
7	2015_MARMOT.04.BIB.lmarc	lmarc	477644544	08-22-2015 8:50PM
8	2015_MARMOT.05.BIB.lmarc	lmarc	270623488	08-22-2015 8:07AM
9	2015_MARMOT.06.BIB.lmarc	lmarc	380181052	08-23-2015 11:58PM

Load Records--export the list of bibs using data exchange



The screenshot displays a software interface with a 'FUNCTION' dropdown menu set to 'Data Exchange'. Below the menu is a toolbar containing icons for 'View', 'Copy', 'Delete', 'Create C', 'Create T', 'Create D', 'Create M', 'Put FTS', and 'Put PC'. A green arrow points to the 'Create T' icon. Below the toolbar is a table with a 'Last Modified' header and several rows of dates and times.

Last Modified
08-12-2015 9:11AM
07-13-2015 7:33AM
07-14-2015 7:22AM
07-15-2015 3:41PM
07-15-2015 7:25AM

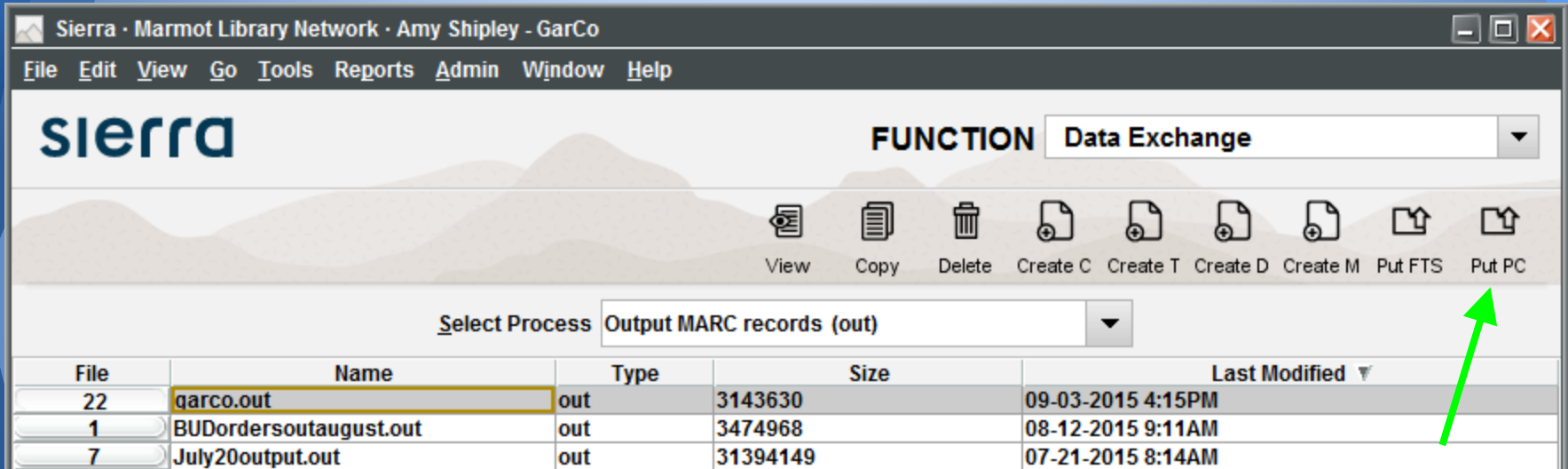
Load Records--export the list of bibs using data exchange

The screenshot shows a web application window titled "Sierra · Marmot Library Network · Amy Shipley - GarCo". The interface includes a menu bar with "File", "Edit", "View", "Go", "Tools", "Reports", "Admin", "Window", and "Help". The main header features the "sierra" logo, the text "FUNCTI...", and a "Data Exchange" dropdown menu. On the right side, there are "Print" and "Close" buttons. The main content area displays the following information:

- Process: Output MARC records
- Function: CREATE file of unblocked MARC records
- Output File: garco .out
- Review: [Review] Review file: 99. GARCO order bibs (1549) (BIBLIOGRAPHIC)

Below this information is an "Output Messages" section, which is currently empty. At the bottom center of the interface is a prominent "Start" button.

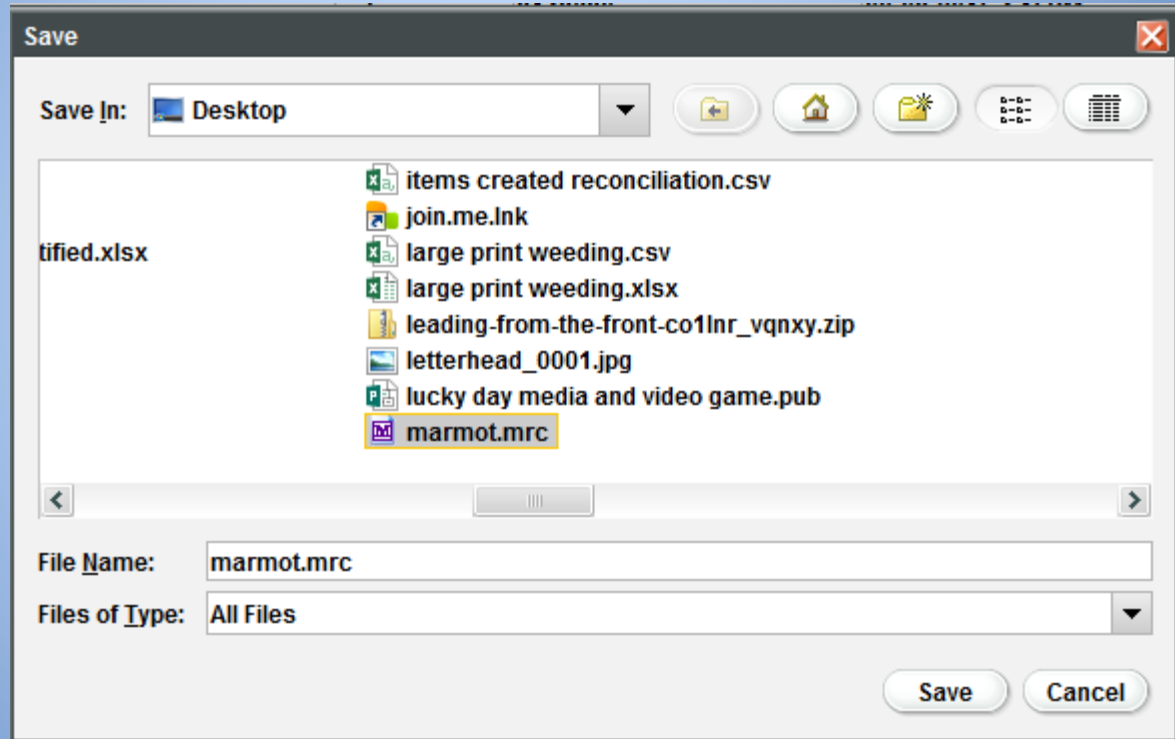
Load Records--export the list of bibs using data exchange



The screenshot shows the Sierra Marmot Library Network interface. The window title is "Sierra · Marmot Library Network · Amy Shipley - GarCo". The menu bar includes File, Edit, View, Go, Tools, Reports, Admin, Window, and Help. The main header displays the "sierra" logo and a "FUNCTION" dropdown menu set to "Data Exchange". Below the header is a toolbar with icons for View, Copy, Delete, Create C, Create T, Create D, Create M, Put FTS, and Put PC. A "Select Process" dropdown menu is set to "Output MARC records (out)". A table lists the output files with columns for File, Name, Type, Size, and Last Modified. A green arrow points to the "Put PC" icon in the toolbar.

File	Name	Type	Size	Last Modified
22	garco.out	out	3143630	09-03-2015 4:15PM
1	BUDordersoutaugust.out	out	3474968	08-12-2015 9:11AM
7	July20output.out	out	31394149	07-21-2015 8:14AM

Load Records--export the list of bibs using data exchange



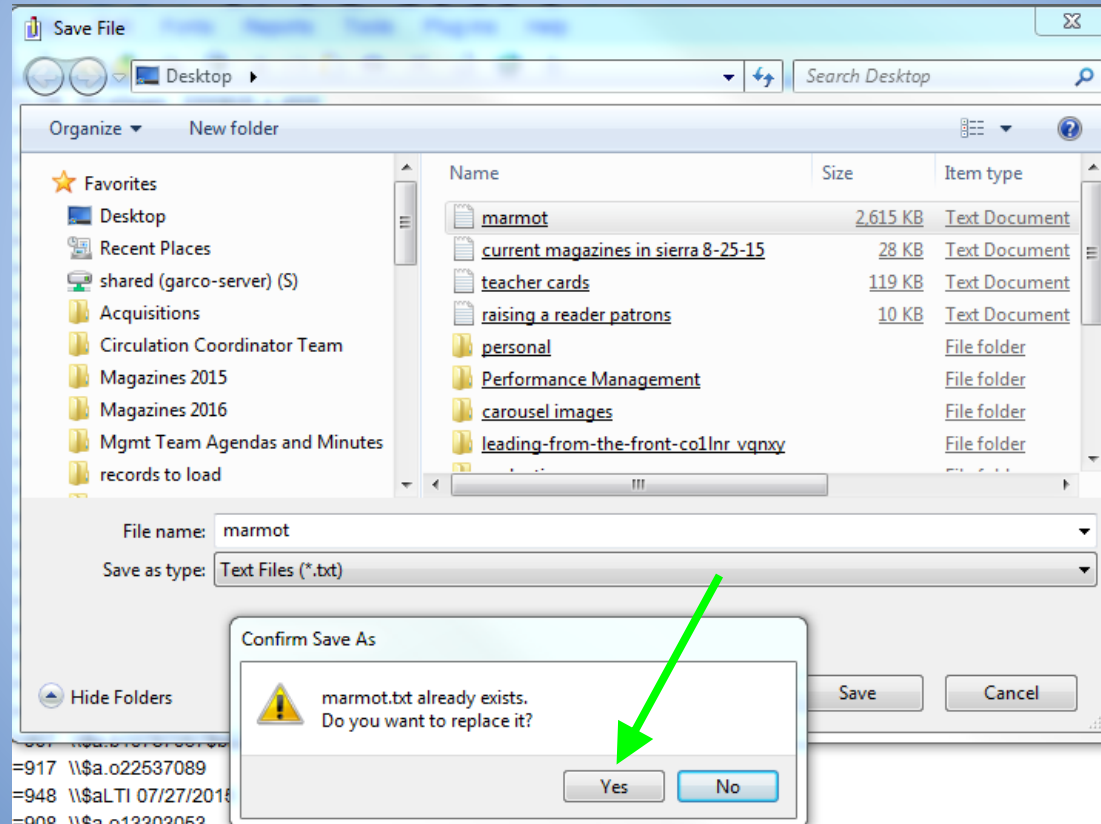
Load Records

open the file you just exported, it will
open in MarcEdit

in MarcEdit click Execute, then Edit
Records

then save as Marmot.txt

Load Records

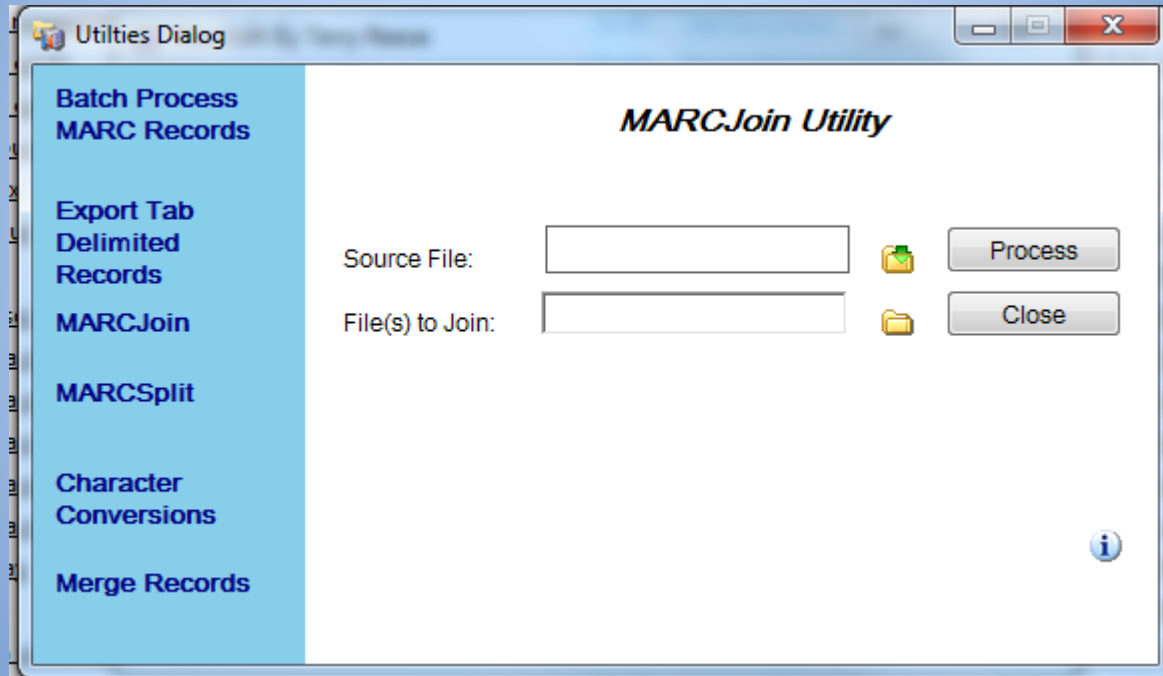


=917 \\\$a.o22537089
=948 \\\$a.LTI 07/27/2016
=908 \\\$a.o13303053

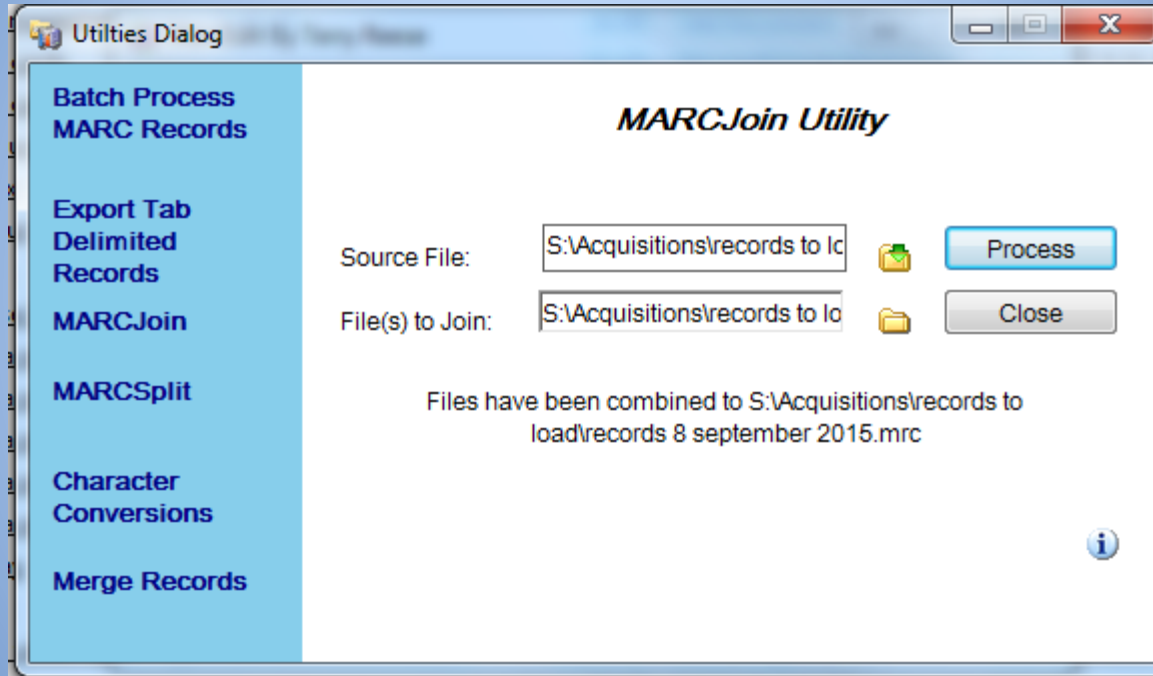
Load Records--use MarcEdit Join to bundle together a bunch of files



Load Records--name source file and files to join (source file is actually the “destination” file)



Load Records



**Load Records--open the joined file in
MarcEdit**

**Browse to the file you just created, click
on it to open it in MarcEdit, click **Execute,**
Edit Records**

Load Records--run the macro

In MarcEdit, click Plug-ins, Marquis

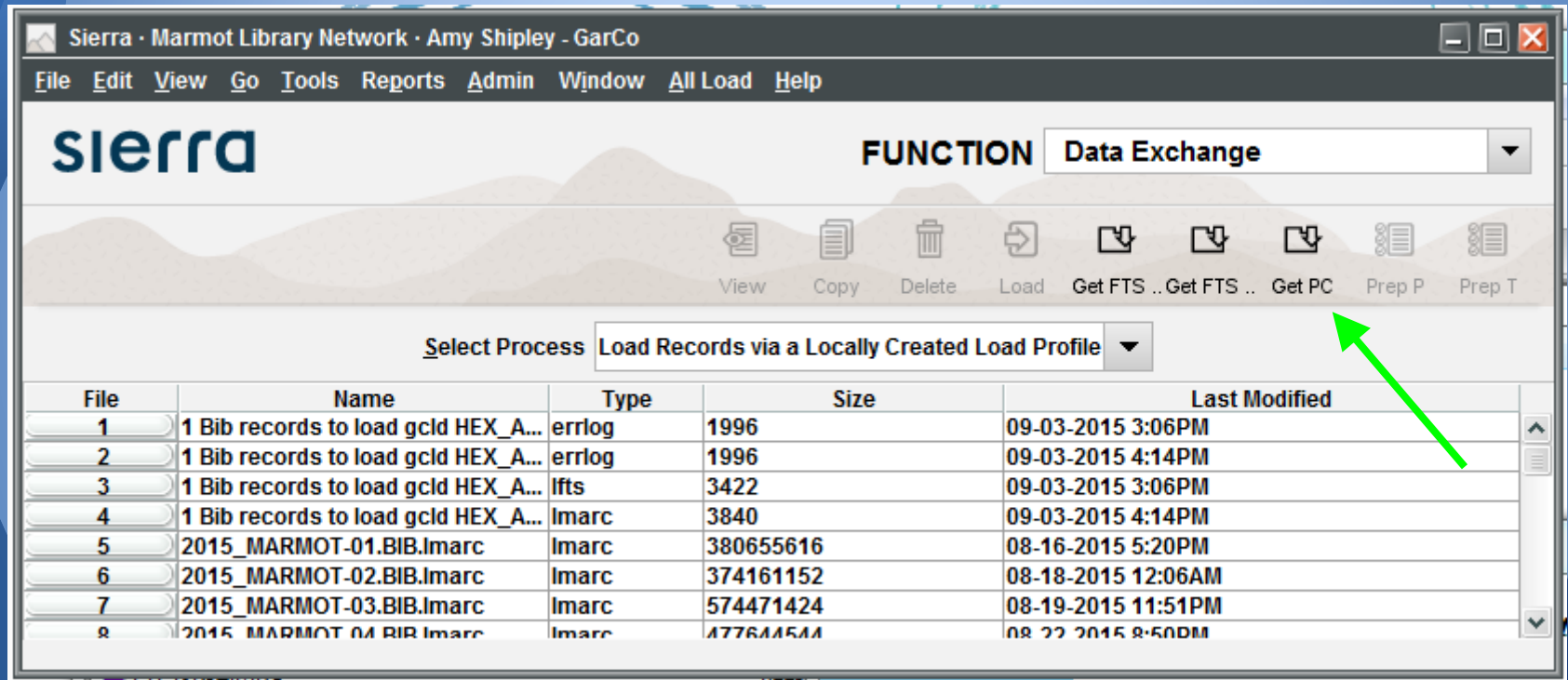
Uncheck the box next to Use Server

Click Marquis, Process

Then click Marquis, Compile

Close MarcEdit, it asks you if you want to save, click no.

Load Records--upload the compiled file to Sierra



The screenshot shows the Sierra Marmot Library Network interface. The window title is "Sierra · Marmot Library Network · Amy Shipley · GarCo". The menu bar includes "File", "Edit", "View", "Go", "Tools", "Reports", "Admin", "Window", "All Load", and "Help". The main header displays the "sierra" logo and a "FUNCTION" dropdown menu set to "Data Exchange". Below the header is a toolbar with icons for "View", "Copy", "Delete", "Load", "Get FTS ..", "Get FTS ..", "Get PC", "Prep P", and "Prep T". A "Select Process" dropdown menu is set to "Load Records via a Locally Created Load Profile". A table below the menu lists files with columns for "File", "Name", "Type", "Size", and "Last Modified". A green arrow points to the "Get PC" button in the toolbar.

File	Name	Type	Size	Last Modified
1	1 Bib records to load gclid HEX_A...	errlog	1996	09-03-2015 3:06PM
2	1 Bib records to load gclid HEX_A...	errlog	1996	09-03-2015 4:14PM
3	1 Bib records to load gclid HEX_A...	lfts	3422	09-03-2015 3:06PM
4	1 Bib records to load gclid HEX_A...	lmarc	3840	09-03-2015 4:14PM
5	2015_MARMOT-01.BIB.lmarc	lmarc	380655616	08-16-2015 5:20PM
6	2015_MARMOT-02.BIB.lmarc	lmarc	374161152	08-18-2015 12:06AM
7	2015_MARMOT-03.BIB.lmarc	lmarc	574471424	08-19-2015 11:51PM
8	2015_MARMOT-04.BIB.lmarc	lmarc	477644544	08-22-2015 8:50PM

Load Records--prep the file in Sierra

The screenshot shows the Sierra Marmot Library Network interface. The window title is "Sierra · Marmot Library Network · Amy Shipley - GarCo". The menu bar includes File, Edit, View, Go, Tools, Reports, Admin, Window, All Load, and Help. The main header displays the "sierra" logo and a "FUNCTION" dropdown menu set to "Data Exchange". Below the header is a toolbar with icons for View, Copy, Delete, Load, Get FTS .. Get FTS .., Get PC, Prep P, and Prep T. A "Select Process" dropdown menu is set to "Load Records via a Locally Created Load Profile". A table lists files with columns for File, Name, Type, Size, and Last Modified. The first row is highlighted, and a green arrow points to it. Another green arrow points to the "Prep P" button in the toolbar.

File	Name	Type	Size	Last Modified
1	(135)records 8 september 2015....	lfts	236365	09-08-2015 9:37AM
2	1 Bib records to load gclid HEX_A...	errlog	1996	09-03-2015 3:06PM
3	1 Bib records to load gclid HEX_A...	errlog	1996	09-03-2015 4:14PM
4	1 Bib records to load gclid HEX_A...	lfts	3422	09-03-2015 3:06PM
5	1 Bib records to load gclid HEX_A...	lmarc	3840	09-03-2015 4:14PM
6	2015_MARMOT-01.BIB.lmarc	lmarc	380655616	08-16-2015 5:20PM
7	2015_MARMOT-02.BIB.lmarc	lmarc	374161152	08-18-2015 12:06AM
8	2015_MARMOT-03.BIB.lmarc	lmarc	574471424	08-19-2015 11:51PM

Load Records--use load table X

Sierra · Marmot Library Network · Amy Shipley · GarCo

File Edit View Go Tools Reports Admin Window All Load Help

sierra FUNCTION Data Exchange

View Copy Delete Load Get FTS .. Get FTS .. Get PC Prep P Prep T

Select Process Load Records via a Locally Created Load Profile

File	Name	Type	Size	Last Modified
1	(135)records 8 september 2015....	lfts	236365	09-08-2015 9:37AM
2	(135)records 8 september 2015....	lmarc	254976	09-08-2015 9:38AM
3	1 Bib records to load gclid HEX_A...	errlog	1996	09-03-2015 3:06PM
4	1 Bib records to load gclid HEX_A...	errlog	1996	09-03-2015 4:14PM
5	1 Bib records to load gclid HEX_A...	lfts	3422	09-03-2015 3:06PM
6	1 Bib records to load gclid HEX_A...	lmarc	3840	09-03-2015 4:14PM
7	2015_MARMOT-01.BIB.lmarc	lmarc	380655616	08-16-2015 5:20PM
8	2015_MARMOT-02.BIB.lmarc	lmarc	374161152	08-18-2015 12:06AM
9	2015_MARMOT-03.BIB.lmarc	lmarc	574471424	08-19-2015 11:51PM
10	2015_MARMOT-04.BIB.lmarc	lmarc	477644544	08-22-2015 8:50PM
11	2015_MARMOT-05.BIB.lmarc	lmarc	270623488	08-22-2015 8:07AM

Load Records--use load table X

Sierra · Marmot Library Network · Amy Shipley - GarCo

File Edit View Go Tools Reports Admin Window Help

sierra FUNCTION Data Exchange

Print Close

Process Load Records via a Locally Created Load Profile

Function (X) Load vendor file 917 MARC tag match

Input File (135)records 8 september 2015.MRC.lmarc (254,976 bytes)

Start Block 1

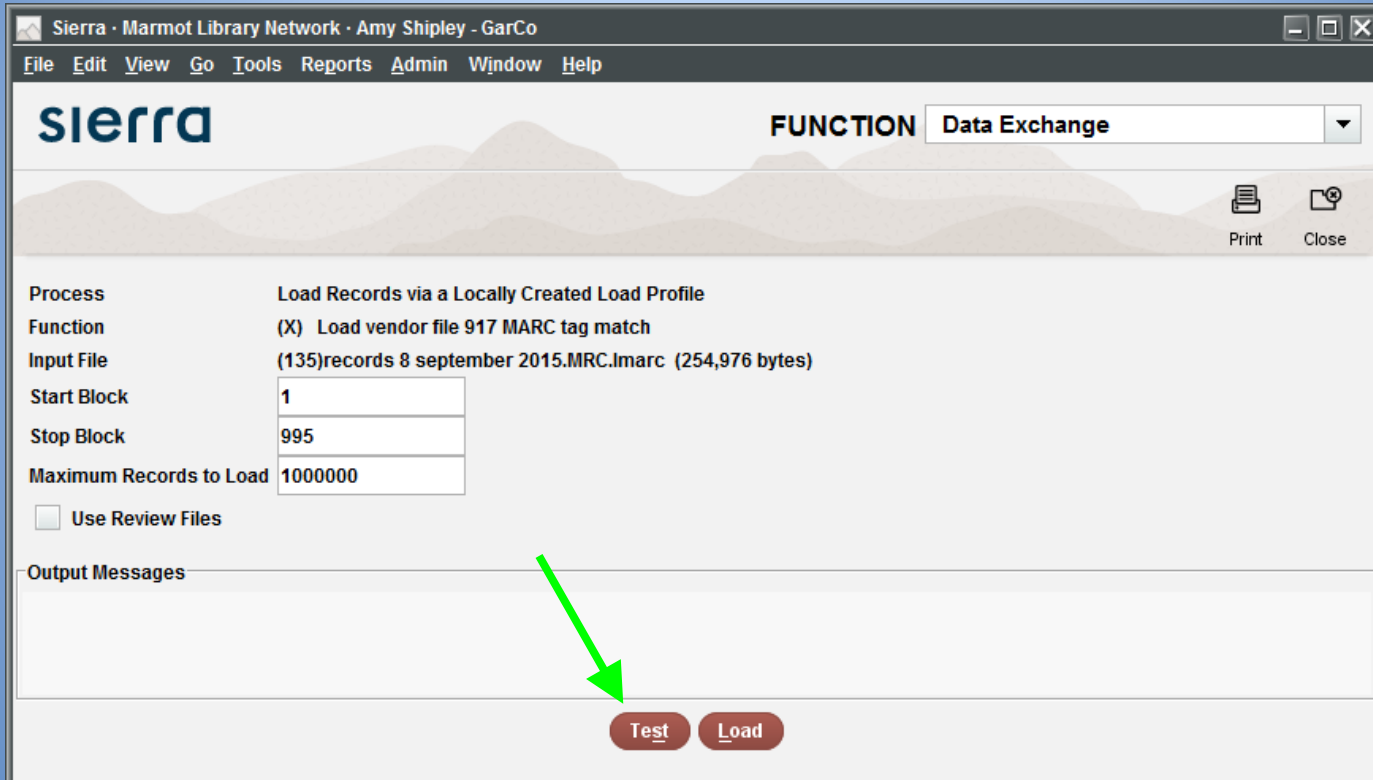
Stop Block 995

Maximum Records to Load 1000000

Use Review Files

Output Messages

Test Load

A screenshot of the Sierra Data Exchange web interface. The window title is "Sierra · Marmot Library Network · Amy Shipley - GarCo". The menu bar includes "File", "Edit", "View", "Go", "Tools", "Reports", "Admin", "Window", and "Help". The main header shows the "sierra" logo and a "FUNCTION" dropdown menu set to "Data Exchange". On the right side of the header, there are "Print" and "Close" buttons. The main content area displays configuration details for a process: "Load Records via a Locally Created Load Profile". The function is "(X) Load vendor file 917 MARC tag match" and the input file is "(135)records 8 september 2015.MRC.lmarc (254,976 bytes)". There are input fields for "Start Block" (1), "Stop Block" (995), and "Maximum Records to Load" (1000000). A checkbox for "Use Review Files" is unchecked. Below this is an "Output Messages" section. At the bottom, there are two buttons: "Test" and "Load". A green arrow points to the "Test" button.

Load Records--use load table X

Sierra · Marmot Library Network · Amy Shipley - GarCo

File Edit View Go Tools Reports Admin Window Help

sierra FUNCTION Data Exchange

Print Close

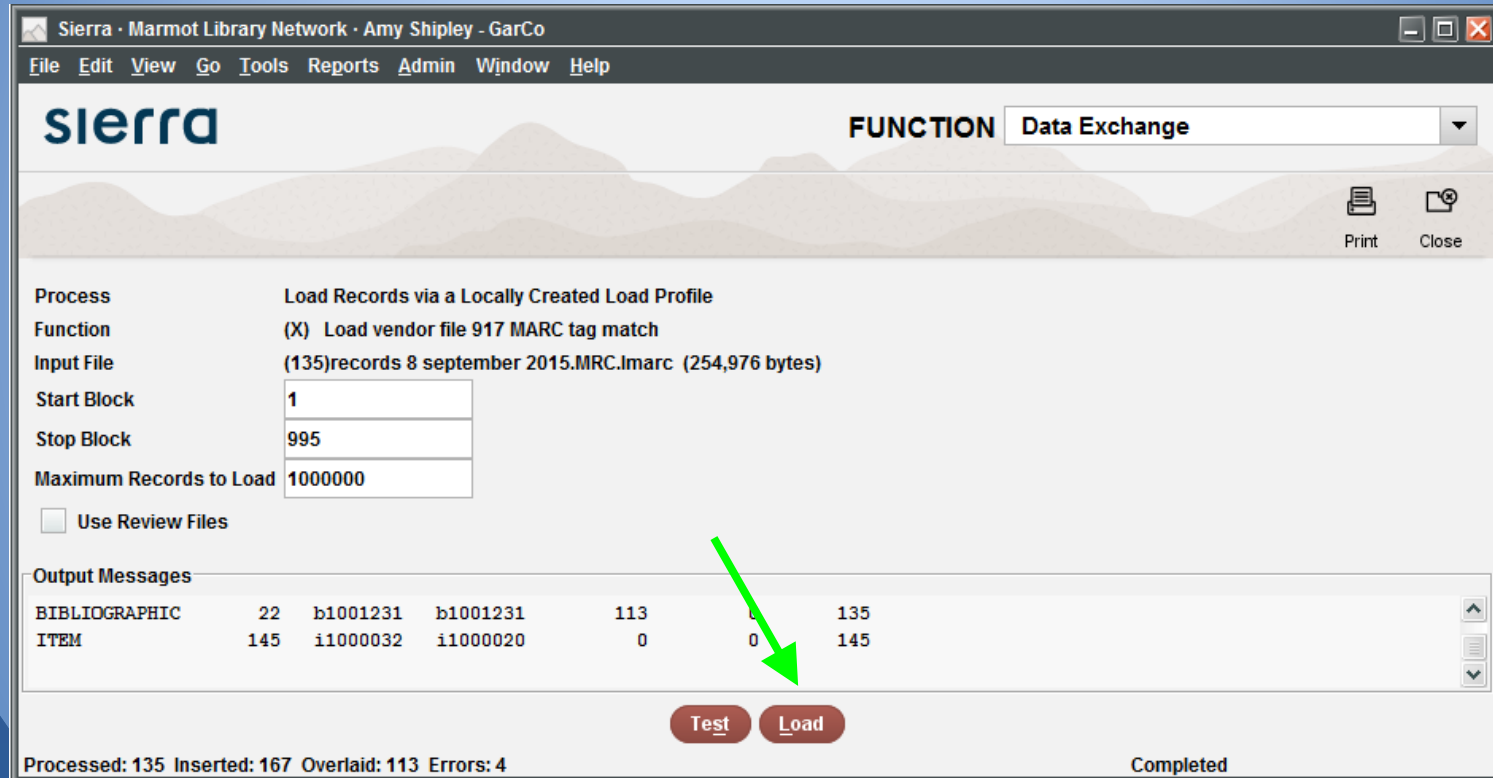
Process Load Records via a Locally Created Load Profile
Function (X) Load vendor file 917 MARC tag match
Input File (135)records 8 september 2015.MRC.lmarc (254,976 bytes)
Start Block 1
Stop Block 995
Maximum Records to Load 1000000
 Use Review Files

Output Messages

BIBLIOGRAPHIC	22	b1001231	b1001231	113	0	135
ITEM	145	i1000032	i1000020	0	0	145

Test Load

Processed: 135 Inserted: 167 Overlaid: 113 Errors: 4 Completed



Load Records--print to email

```
Page 2
43 291 The Iron Butterfly OVERLAY b49054703
    INSERT i99553338
44 293 Blue potatoes, orange tomatoes INSERT b49231662 MAT = 1
    INSERT i9955334x
45 299 Ultimate Book of Step-By-Step C INSERT b49231674 MAT = 1
    INSERT i99553351
REC BLOCK TITLE RESULT MATCHES
46 302 Blue potatoes, orange tomatoes INSERT b49231686 MAT = 1
    INSERT i99553363
```

Anything with “insert b” is a potential duplicate in Sierra. Dedupe these.

Duplicate Check

Using Headings Reports, run a duplicate entry search and clear the duplicates.

Download and Process Invoices

Delete invoices from the vendor server after downloading

Clean Up BOBs with no Items

Make a list of all of paid orders within a certain date range (start small, you can always go bigger)

Flip that list into a list of bibs

Clean Up BOBs with no Items

Open the list of bibs in global update

Use Tools-->Limit with the limit being item location between gc and gcz

This excludes any bibs without garco items attached.

Clean Up BOBs with no Items

Remove any bibs that came up after that limit. (You are removing the bibs with your items attached)

That leaves bibs with a garco order attached but no garco item attached

Dedupe Sierra from this list