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

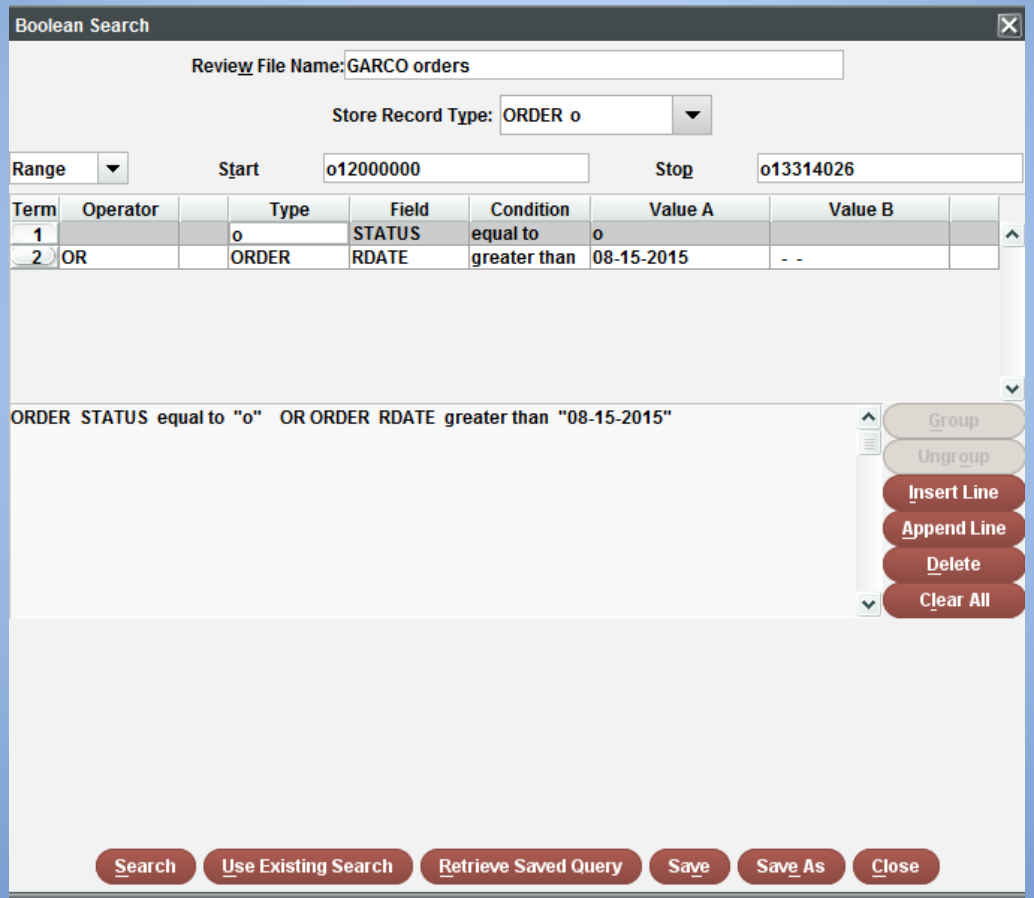
I only get EDI acknowledgments from Ingram. Midwest Tapes sends email confirmations.

Post Encumbrances

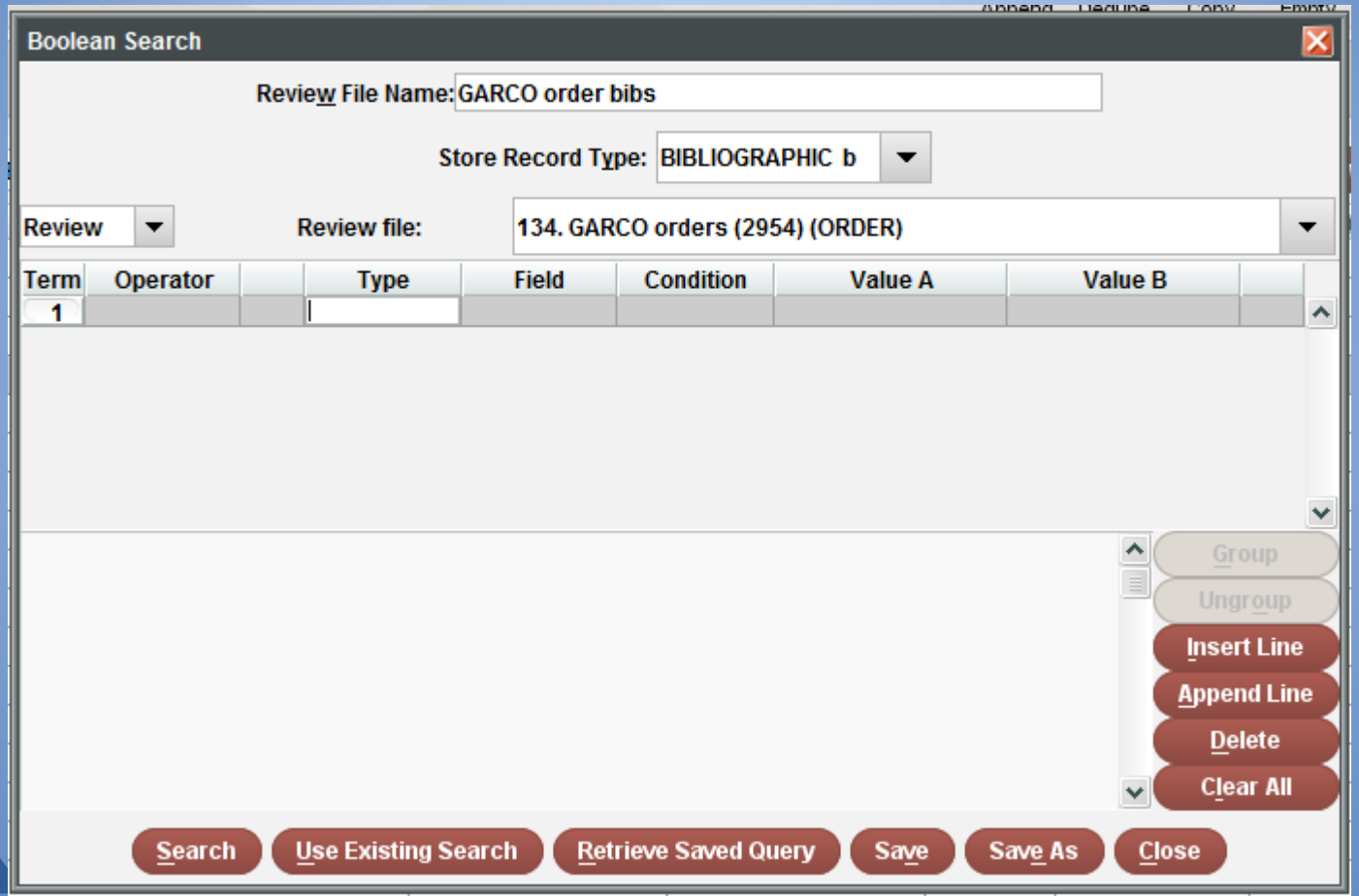
Duplicate Check

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

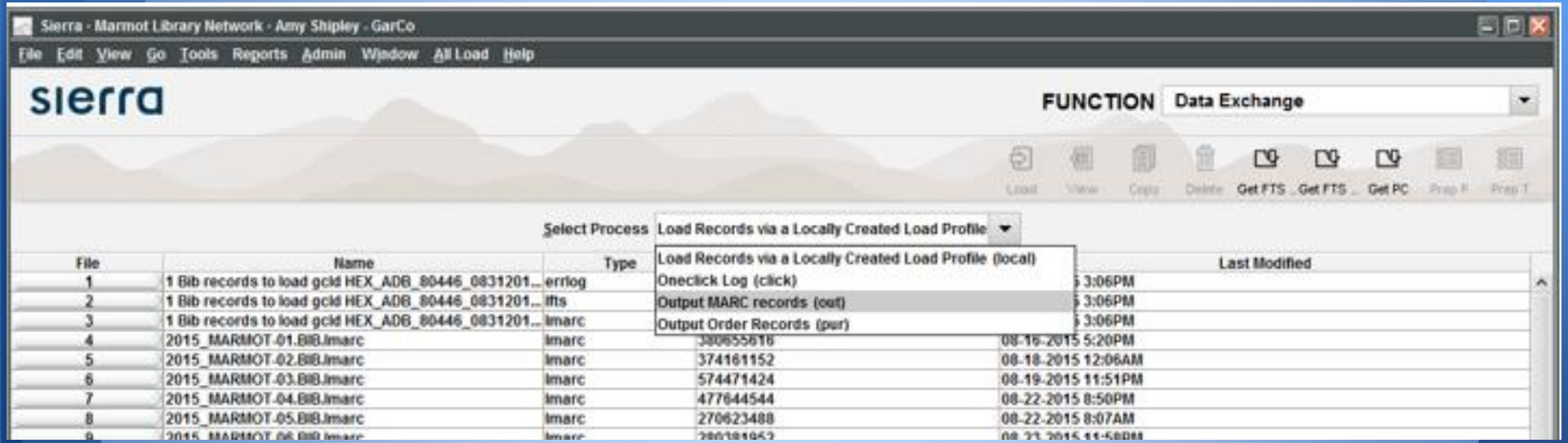
Load Records--make a list of pending orders



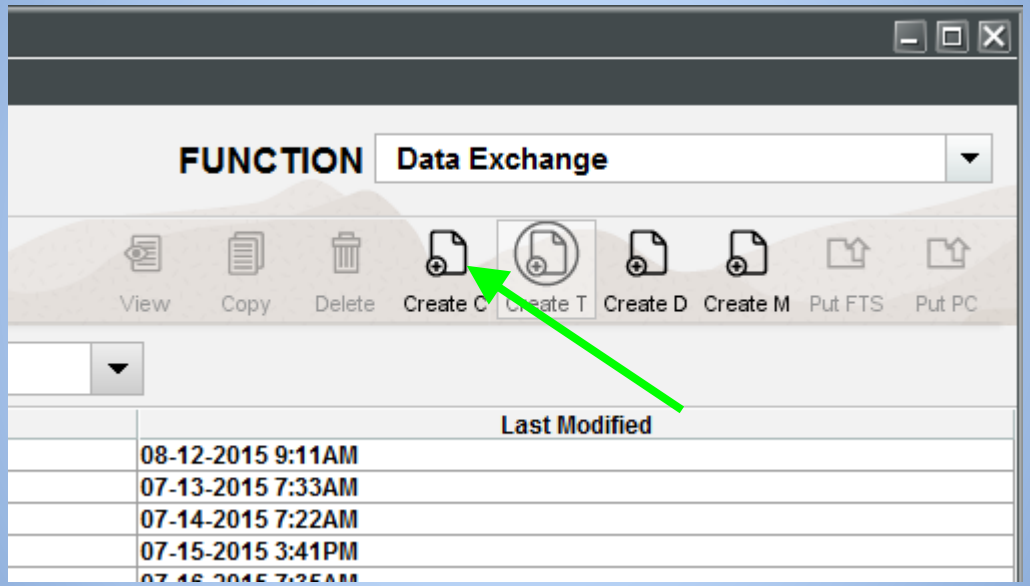
Load Records--flip list of orders into list of bibs



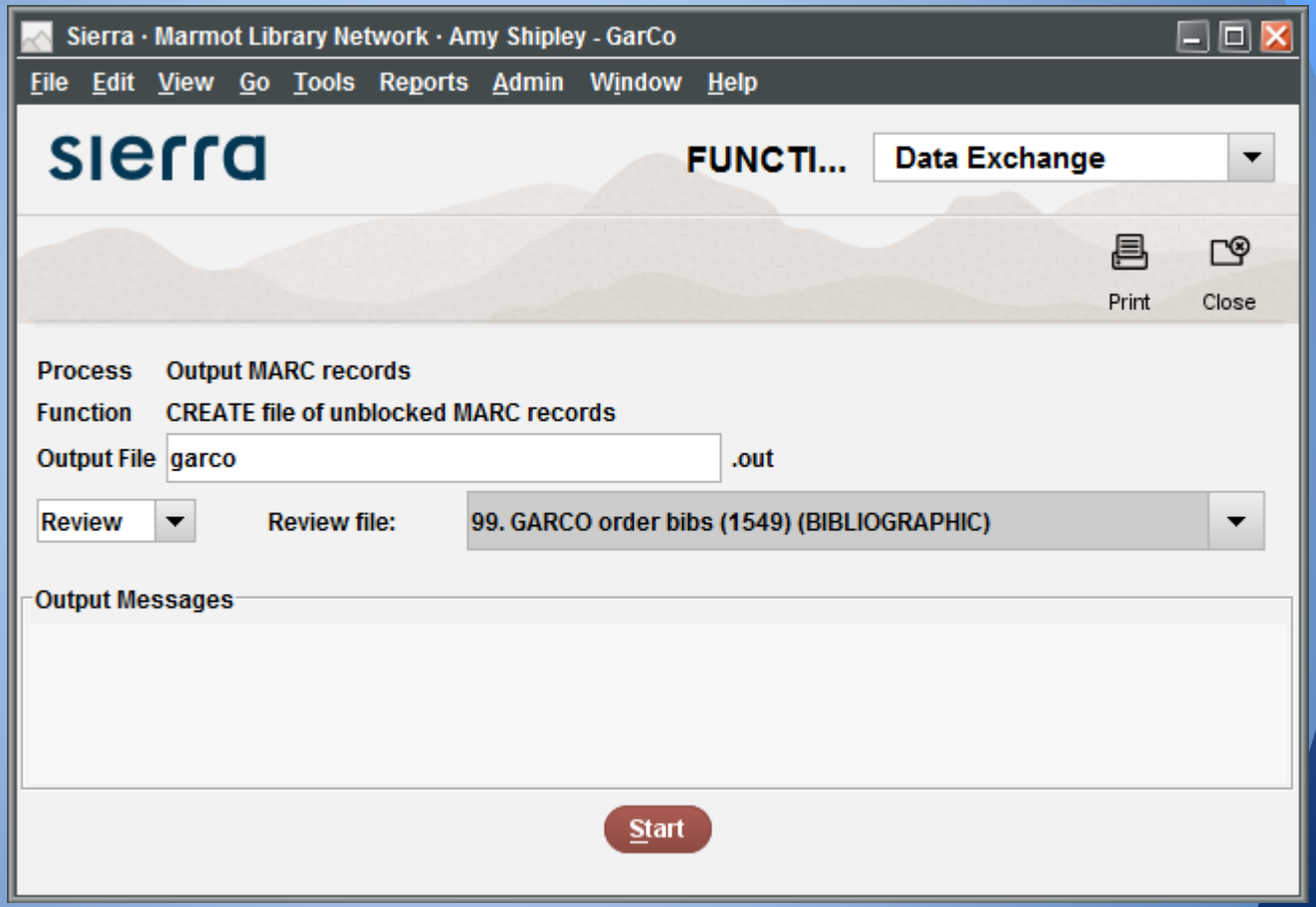
Load Records--empty the list of orders and export the list of bibs using data exchange



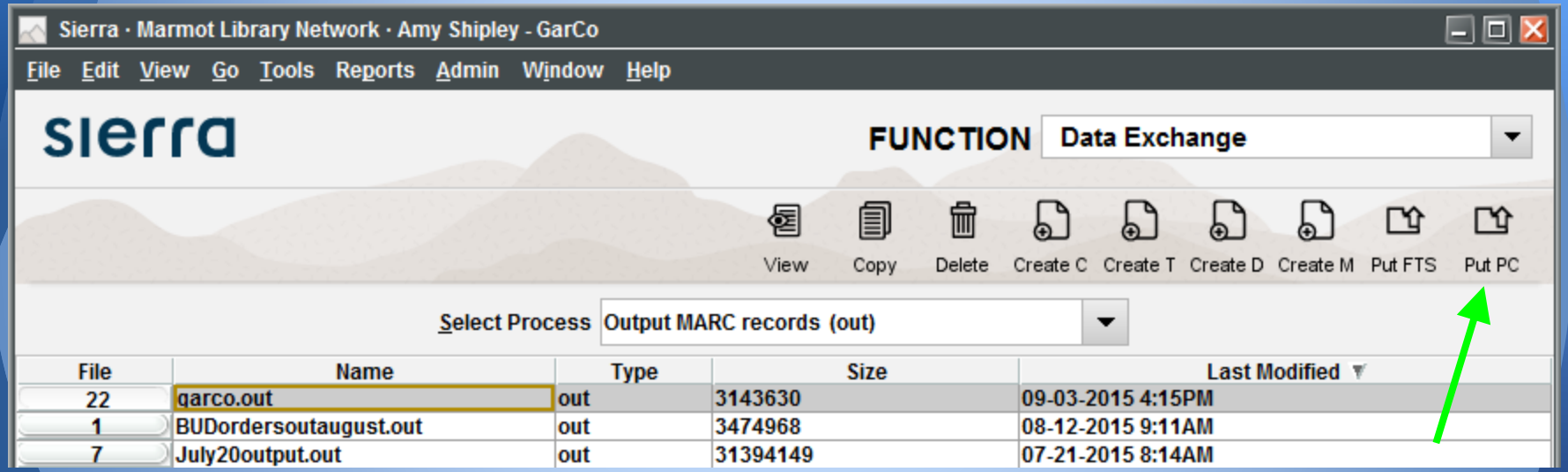
Load Records--export the list of bibs using data exchange



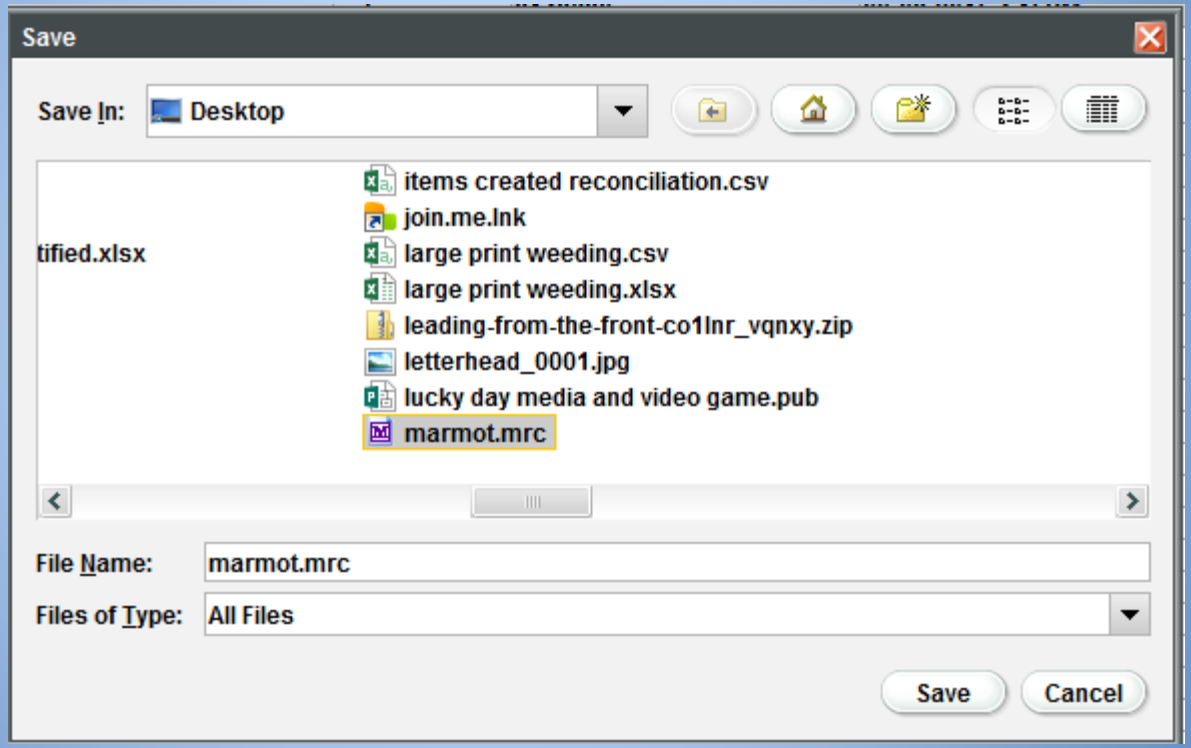
Load Records--export the list of bibs using data exchange



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



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



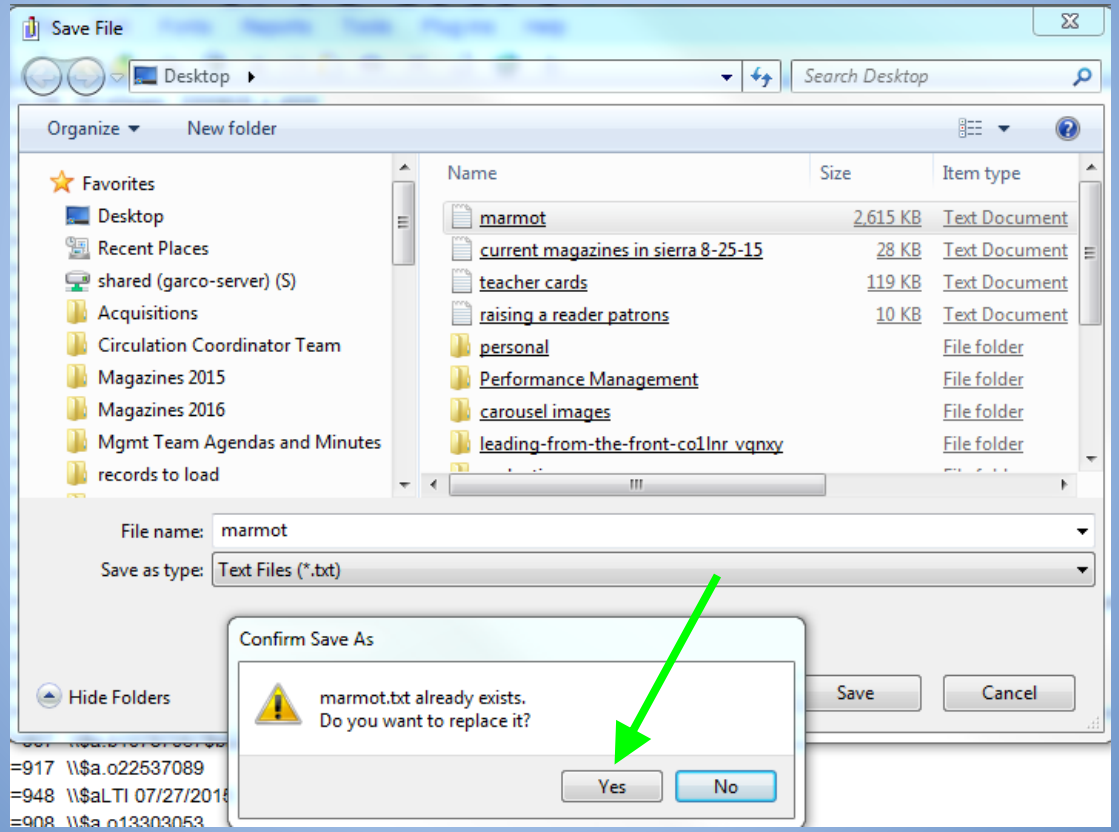
Load Records

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

in MarcEdit click Execute, then Edit Records

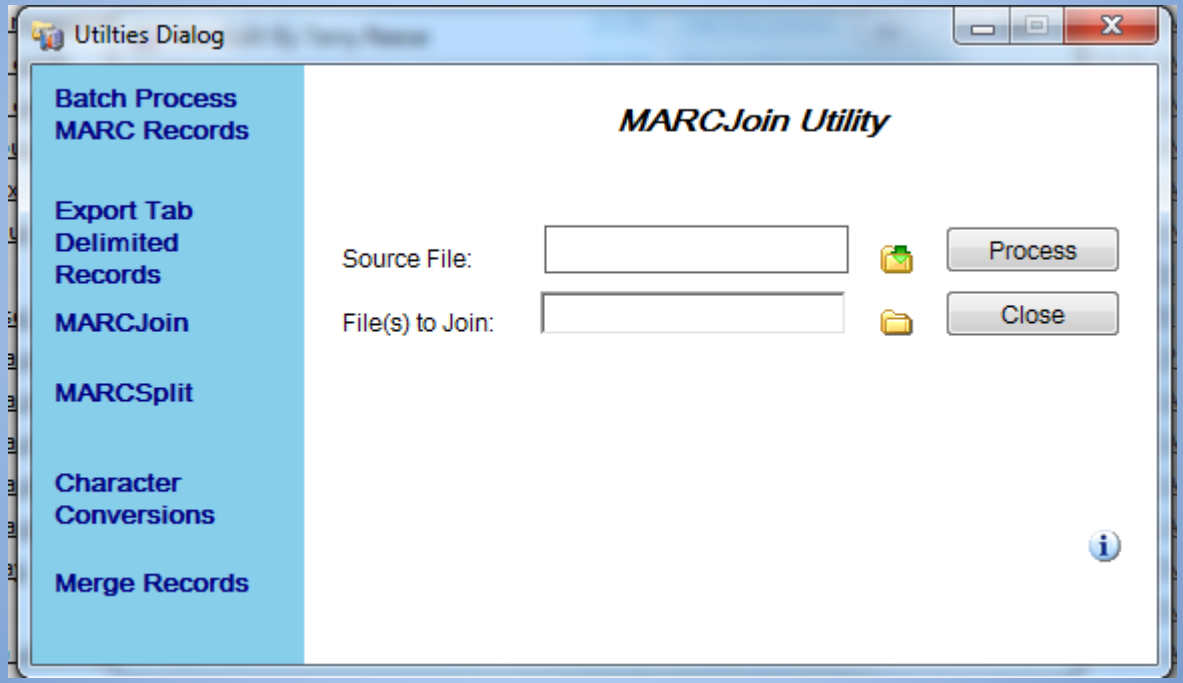
then save as Marmot.txt

Load Records



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

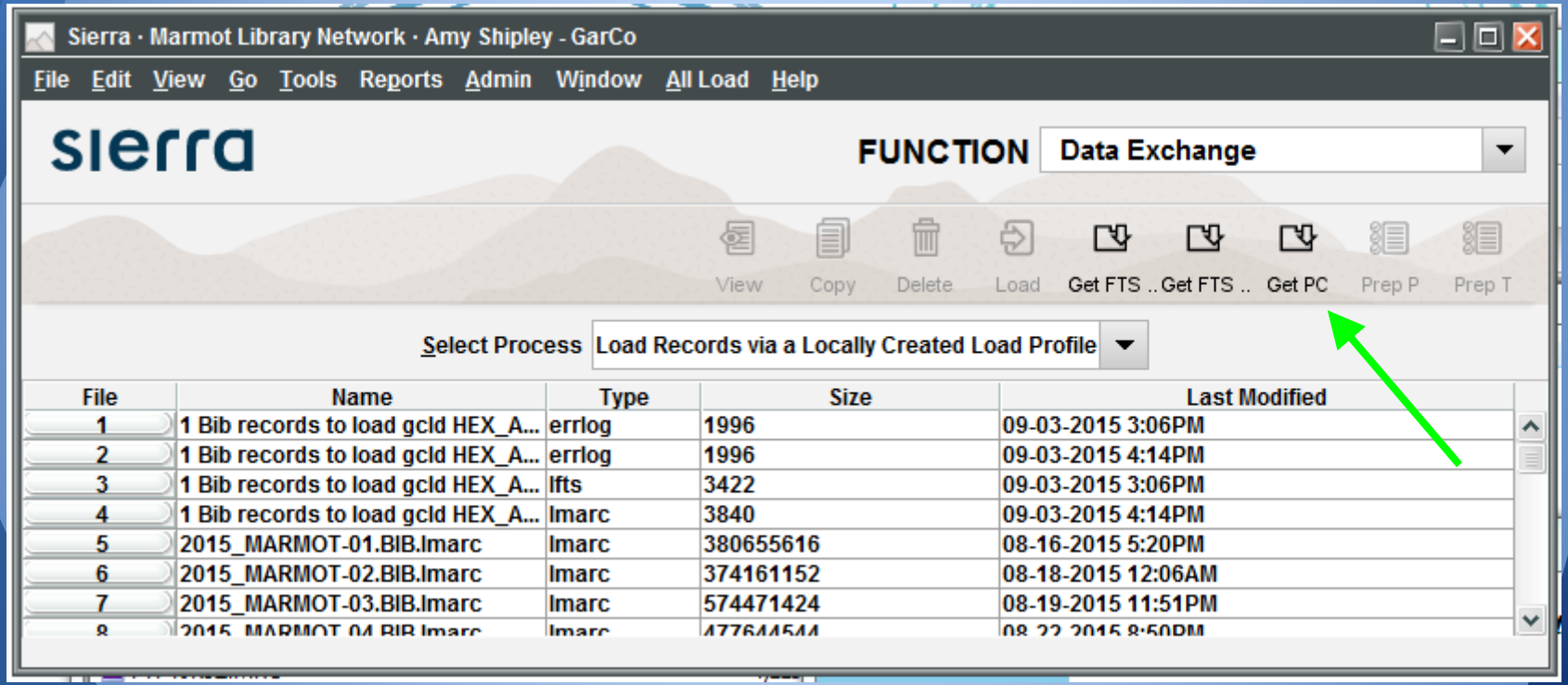
Load Records--open the joined file in MarcEdit

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

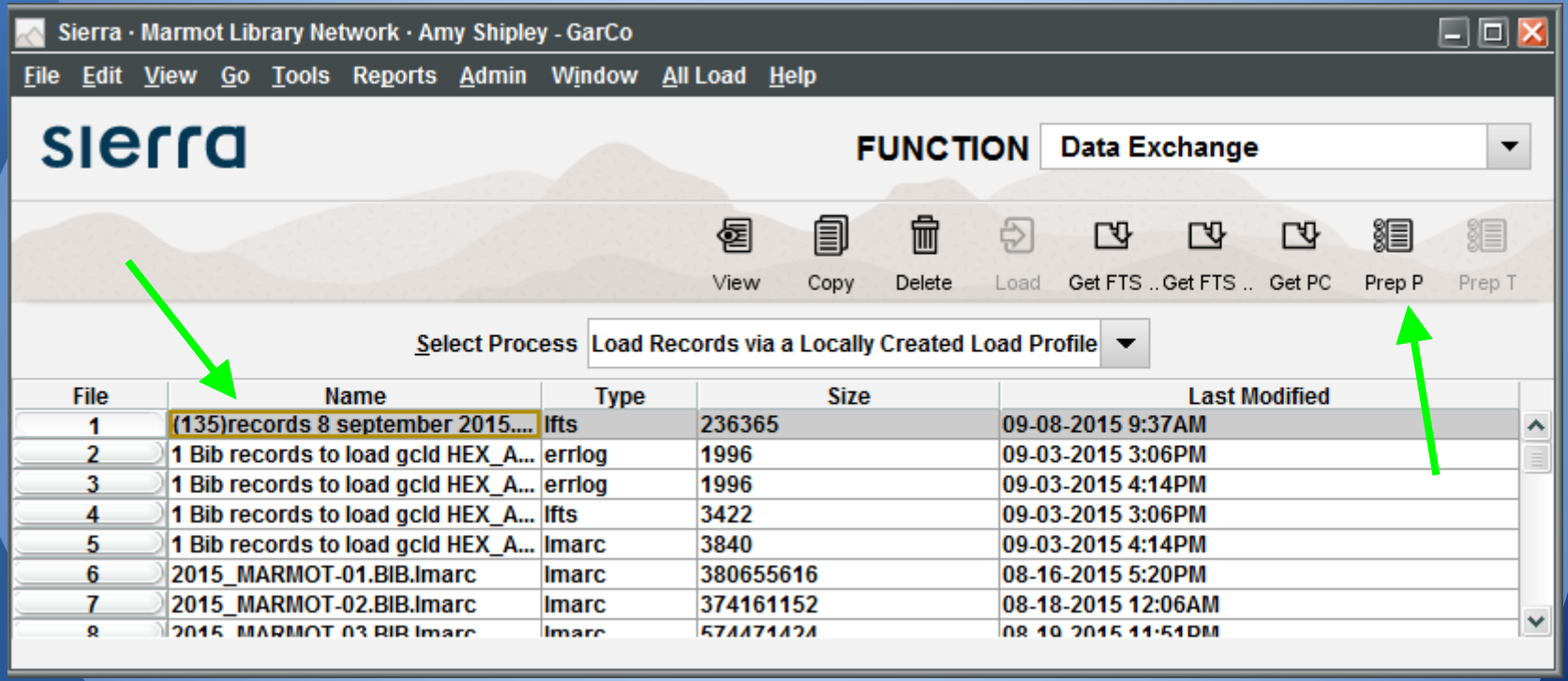
Load Records--run the macro

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.

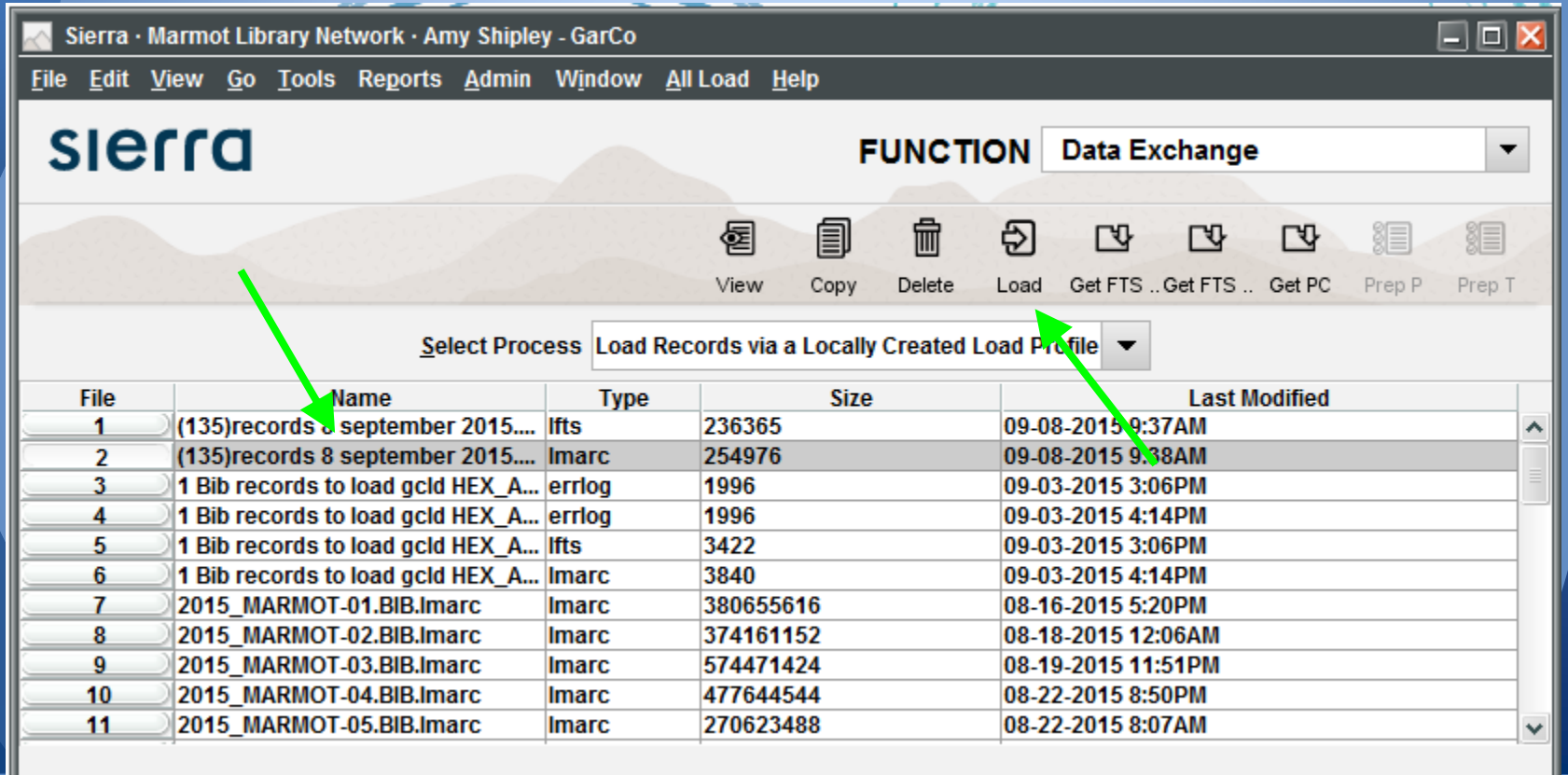
Load Records--upload the compiled file to Sierra



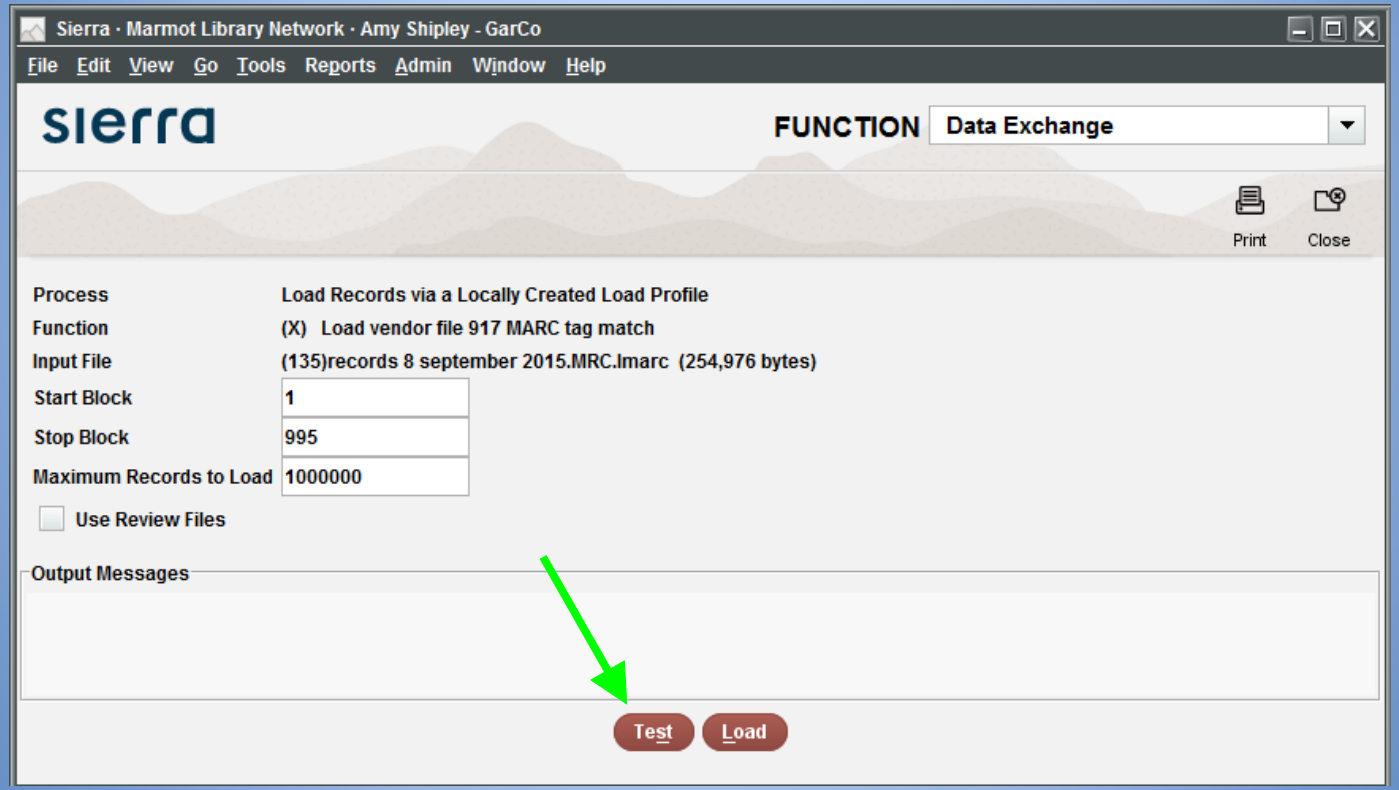
Load Records--prep the file in Sierra



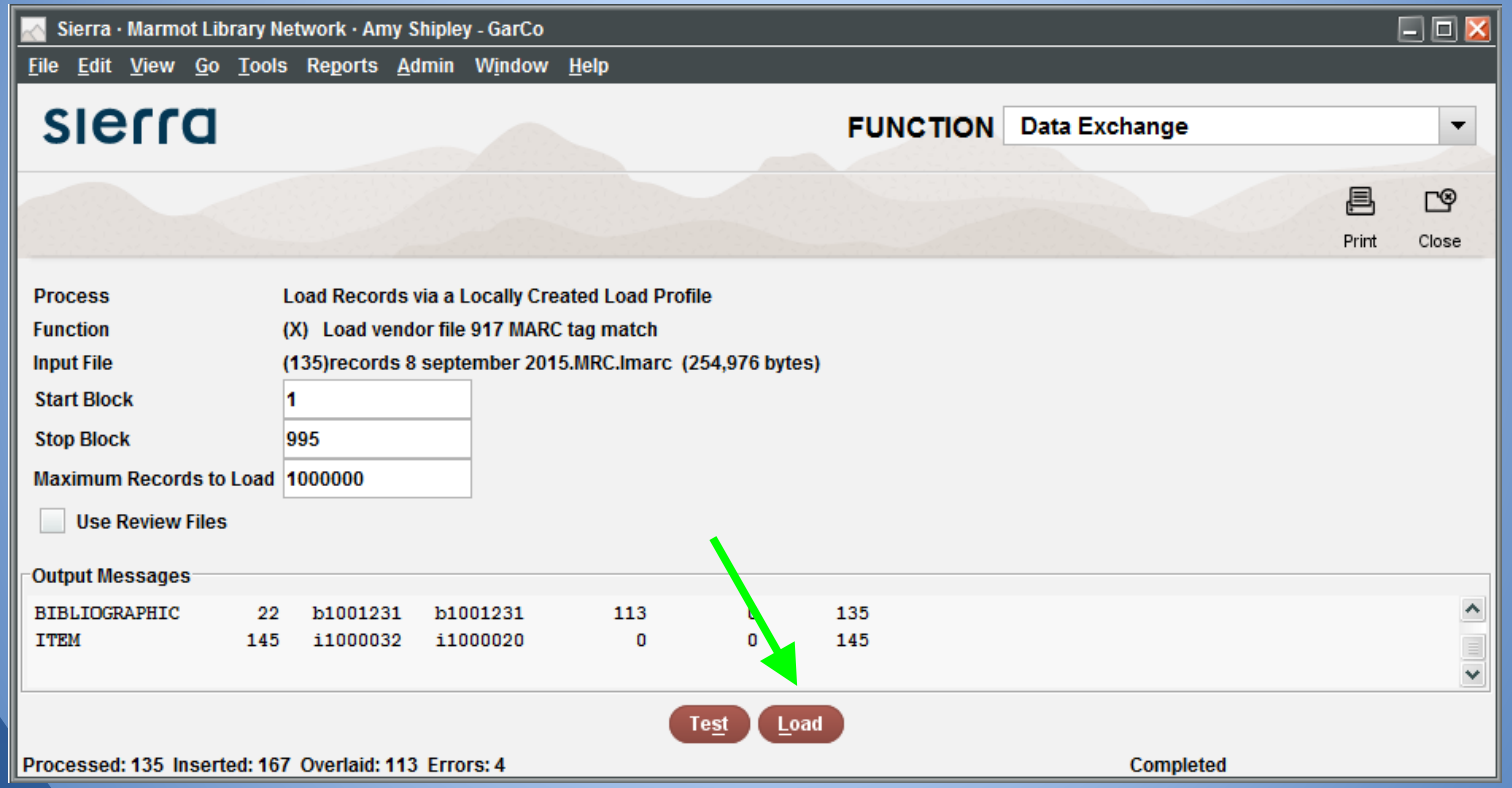
Load Records--use load table X



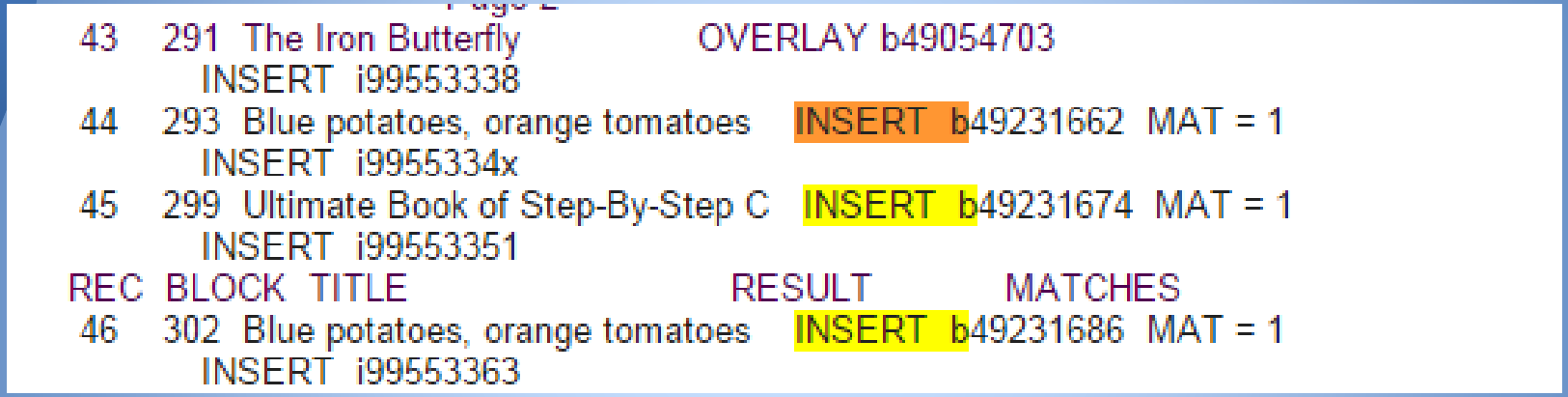
Load Records--use load table X



Load Records--use load table X



Load Records--print to email



```
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