

Create orders by importing MARC Bibliographic Records

 **UXPROD-185** - Import Orders in MARC format DRAFT

DRAFT

Problem(s):

- Some vendors send order-related data in MARC records, so that the receiving library can create orders in their local system from that data. The order data may be sent at two points in the order workflow
 - **Point of order**
 - For orders placed on the vendor's ordering system, e.g. firm orders. For these, the vendor does not have a FOLIO POL, since the order is placed in the vendor's system before the order is created in FOLIO (question: would FOLIO need a way for the vendor to send back a POL and have it populate the FOLIO PO/POL fields? Dev preference is no, at least for first iteration, since it would add complexity. Note that this workflow is also covered by the FOLIO Order API process, which is real-time and more efficient than this workflow, at least for creating orders.
 - For selections made in the vendor's ordering system, but not yet ordered. For these pre-order records, the vendor expects to receive back a finalized order from FOLIO, preferably as EDIFACT.
 - **Point of receipt/invoicing**
 - For materials invoiced automatically by the vendor and purchased by the library. In this flow, orders may only be created if the library wants to track the materials as individual titles and/or pay for the materials as individual titles.
 - Most common materials supplied via this workflow:
 - Approval plan automatic purchases (Physical and/or E) where titles are automatically supplied based on a profile that the library sets up with the vendor. Profiles may be based on subject language, publisher, or combinations of several characteristics.
 - Demand Driven or Patron Driven Acquisitions (Mainly E) where titles are automatically invoiced based on patron usage passing a trigger point that causes titles to be purchased automatically by the library
 - In this flow, there is no opportunity for FOLIO to return a POL to the vendor before invoicing, so the invoice match to the POL much rely on a Vendor Reference Number

Use Cases & Requirements:

Requirement	Status	Use cases
Allow users create orders and order lines based on order data supplied in MARC bibliographic records	OPEN	
Allow users to create field mapping profiles, action profiles, and job profiles to support MARC-based order data	OPEN	

Mockup for FOLIO PO/POL Field Mapping Screen

Sample MARC file with Order data

What Backend stories are needed?

What UI stories are needed?

SME Questions:

Question	Status	Conclusion	Comments
Is Create the only action needed? (not update)?	OPEN		
Have option to create orders as Pending or Open, or only Open?	OPEN		
OK to follow the regular POL limit setting?	OPEN		
Talk through the flow - when do Inventory records get created? Use the order line setting for Inventory or override with import field mapping profiles?	OPEN		If override, walk through the flow for matching to existing Instances /Holdings vs, Creating new ones

Developer Questions:

Question	Status	Conclusion	Comments
If vendor supplies order date in YYYYMMDD format, can we convert it to FOLIO YYYY-MM-DD default format?	OPEN		
Would we be able to support other order date formats?	OPEN		
Any existing MARC field mapping logic that we need to review?	OPEN		
For prices, FOLIO always wants an explicit decimal (e.g. 25.15, not 2516, correct?)	OPEN		
Any changes needed to Action or Job profiles to support MARC invoice data?	OPEN		
For fund/expense class data, which is preferred?	OPEN		<p>Question for Dennis /Thunderjet</p> <p>Each value in separate MARC field e.g. \$a USHIST \$b Electronic</p> <p>Both values in same MARC field, separated by colon e.g. \$a USHIST: Electronic</p>
Would Folijet need to take the receiving app into account? What happens if the Inventory records are created before the Order records, and not triggered by the POL's Inventory setting - would that be an issue?	OPEN		<p>Question for Dennis /Thunderjet</p>