

 *koha*

FREE LIBRARY SYSTEM



ByWater
SOLUTIONS

INGRAM[®]

Ingram EDI setup for Koha

Lory Koch, Kyle Hall

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Lory Koch <lory.koch@ingramcontent.com>

Kyle Hall <kyle@bywatersolutions.com>

The latest version of this document is available as [PDF](#) and [on the web](#).

Send Koha codes to Ingram

- Select *Reports* from the *More* drop-down menu in Koha
- Click *Create from SQL* in the *Guided Reports* section of the *Reports* page
- Enter *Report Name* and *Select statement* for each of the reports listed below
- Save and run each report
- Download results in *comma separated text* format and attach to email to your customer care associate at Brodart Company

[Example report] | *reports.png*

Figure 1. Example report

- Report Name: **Branch Codes**
 - `SELECT branchcode AS "Branch Code", branchname AS "Branch Name" from branches;`
- Report Name: **Collection Codes**
 - `SELECT authorised_value AS "Collection Code", lib AS "Collection Name" FROM authorised_values WHERE category = 'CCODE';`
- Report Name: **Shelving Location Codes**
 - `SELECT authorised_value AS "Shelving Location Code", lib AS "Shelving Location Name" FROM authorised_values WHERE category = 'LOC';`
- Report Name: **Item Type Codes**
 - `SELECT itemtype AS "Item Type Code", description AS "Item Type Name" FROM itemtypes;`
- Report Name: **Fund Codes**
 - `SELECT budget_code AS "Fund Code", budget_name AS "Fund Name" FROM aqbudgets GROUP BY budget_code ORDER BY timestamp DESC;`

Install the Ingram EDI plugin for Koha

- Open the link <https://github.com/bywatersolutions/koha-plugin-edifact-enhanced/releases> in a web browser.
- Locate most recent *koha-plugin-edifact-enhanced-ingram* plugin
- Click the *kpz* file to Download
- In Koha, Select *Administration* from the *More* drop-down menu
- Click *Manage plugins* in the Plugins section of the Administration Page
- Click the *Upload plugin* button

- Click the *Choose File* button
- Select the plugin file you just downloaded and click the *Open* button.
- Click the *Upload* button
- You should now see a new plugin named *Edifact - Ingram*

Create an Ingram Vendor Record

- Select *Administration* from the *More* drop-down menu in Koha
- Click *EDI accounts* in the Acquisition parameters section of the Administration page
- Click the *New Account* button
- Select *Ingram* as the Vendor
- Select *Edifact – Ingram* as the Plugin
- Select *FTP* as the Transport
- Enter *ftp.ingramcontent.com* as the Remote host
- Enter the *username* and *password* provided by Ingram
- Enter */outgoing* as the Download directory
- Enter */incoming* as the Upload directory
- Select *US SAN Agency (31B)* as the Qualifier
- Enter *1697978* as the SAN (Ingram's *Standard Address Number*)
- Check *Order enabled*
- Check *Invoices enabled*

Modify account

Vendor: Ingram

Plugin: Edifact - Ingram

Description: Ingram orders

Transport: FTP

Remote host: ftp.ingramcontent.com

Username: a20T2661

Password: lanbzwad2

Download directory: /outgoing

The download directory specifies the directory on the ftp site from which quotes and invoices are downloaded.

Upload directory: /incoming

The upload directory specifies the directory on the ftp site to which orders are uploaded.

Qualifier: US SAN Agency (31B)

SAN: 1697978

Quotes enabled: ☐

Orders enabled: ☒

Invoices enabled: ☒

Responses enabled: ☐

Automatic ordering: ☐

With automatic ordering quotes generate orders without staff intervention.

Submit

Cancel

Figure 2. EDI vendor record creation form

Create Ingram Account Records (EANs)

Create an EAN for each unique Ingram account number.

- Select *Administration* from the *More* drop-down menu in Koha
- Click *Library EANs* in the Acquisition parameters section of the Administration page
- Click the *New EAN* button
- If this EAN is to be used by just one library within your system, select that library from the library pulldown
- Enter a Description of the Ingram account to be used
- Enter an Ingram account number as the EAN. This account number should start with "20"
- Select *Assigned by supplier (91)* as the Qualifier

New EAN

Library: All libraries

Description: Ingram EDI

EAN: [Account #]

Qualifier: Assigned by supplier (91)

Submit Cancel

Figure 3. Library EAN creation form

Create MARC Record Import Map

- Select “Administration” from the “More” drop-down menu in Koha
- Click “Global system preferences” on the Administration page
- Click the “Click to Edit” hyperlink in the field to the right of “MarcItemFieldsToOrder”
- Enter the MARC to item field mappings established in your Ingram grid setup
- These values may differ per library but will follow this format:

```
price: 970$g
quantity: 970$q
budget_code: 970$f
sort1: 970$s
sort2: 970$n
nonpublic_note: 970$n
ccode: 970$c
loc: 970$d
notforloan: 970$w
itype: 970$y
public_note: 970$i
```

- Click “Save all Acquisitions preferences” button

MarcItemFieldsToOrder	<p>Set the mapping values for new item records created from a MARC record in a staged file.</p> <pre> price: 970\$g quantity: 970\$q budget_code: 970\$f sort1: 970\$s sort2: 970\$n nonpublic_note: 970\$n ccode: 970\$c loc: 970\$d notforloan: 970\$w itype: 970\$y public_note: 970\$i </pre> <p>Click to collapse You can use the following fields: homebranch, holdingbranch, itype, nonpublic_note, public_note, loc, ccode, notforloan, uri, copyno, price, replacementprice and itemcallnumber. Special fields: quantity and budget_code For example: holdingbranch: 975\$b itype: 975\$9 975\$z</p>
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Figure 4. Koha system preference **MarcItemFieldsToOrder**

Configure EDI plugin

- Browse to Administration ⇒ Manage Plugins
- Click the “Actions” button on the row for the “Edifact - Ingram” plugin, select the “Configure” option.
- Enter the following data into the plugin **Configuration options**:
 - Buyer SAN
 - Buyer qualifier: US SAN Agency
 - Buyer SAN: Enter the buyer SAN Ingram has provided you
 - Fields to send in
 - Header: checked
 - Library EAN
 - NAD+BY: checked
 - File suffixes
 - Order file: epo
 - Invoice file: ein
 - LIN values:
 - EAN: checked
 - ISBN options
 - Force the user of the first ISBN if sending ISBN in the LIN segment: checked
 - PIA values
 - ISBN-10: checked
 - GIR values:
 - Mapping

```
LLO: homebranch
LST: itype
LSQ: ccode
LSM: itemcallnumber
LAC: biblionumber
LCO: itemnumber
LVT: itemnotes_nonpublic
LFN: budget_code
LCD: location
```

- Other ORDER configurations
 - Send basket name: checked
- Other INVOICE configurations
 - Shipping budget from order line: checked
 - Shipping - MOA+304: checked
 - Close invoice on receipt: checked (*optional*)
 - Add item note receipt: checked (*optional*)
- Click *Save Configuration* button.

Figure 5. Plugin configuration, 1 of 3

Figure 6. Plugin configuration, 2 of 3

Figure 7. Plugin configuration, 3 of 3

Ingram to Koha and EDI Release Workflow

- Download the On Order records from Ingram
- In Koha, ensure the system preference *AcqCreateItem* option set to *placing an order*
- Create the basket in Koha
- Stage on order records in Koha
- Add records from staged file to basket
- Save the imported records and double check the basket totals match the cart in Ingram
- Submit EDI order from Koha
- Delete the cart from Ingram's site.