





Ingram EDI setup for Koha

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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

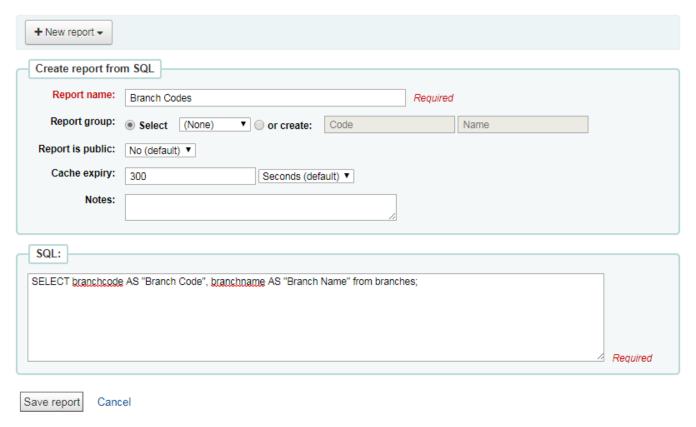


Figure 1. Example report

- 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 				
Modify account				
Vendor:	lngram			
Plugin:	Edifact - Ingram 💠			
Description:	Ingram orders			
Transport:	FTP \$			
Remote host:	ftp.ingramcontent.com			
Username:	a20T2661			
Password:	lanbzwaad2			
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	N	
	Library:	All libraries
Desc	cription:	Ingram EDI
	EAN:	[Account #]
Q	ualifier:	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

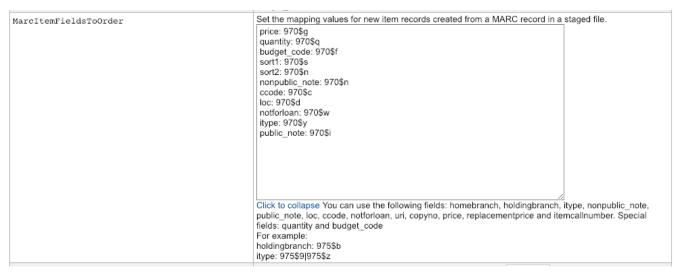


Figure 4. Koha system preference MarcItemFieldsToOrder

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.