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SOLUTIONS

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Ingram EDI setup for Koha

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## 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><a href="#">Click to collapse</a> 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>
-----------------------	--

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.