



FREE LIBRARY SYSTEM



**ByWater**  
SOLUTIONS

## Brodart EDI setup for Koha

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## Send Koha codes to Brodart

- 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

+ New report ▾

Create report from SQL

Report name:  *Required*

Report group: ☒ Select  or create:

Report is public:

Cache expiry:

Notes:

SQL:

*Required*

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 Brodart 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-brodart* 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 - Brodart*

## Create a Brodart 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 *Brodart* as the Vendor
- Select *Edifact – Brodart* as the Plugin
- Select *FTP* as the Transport
- Enter *ftp.brodart.com* as the Remote host
- Enter the *username* and *password* from the Brodart EDI Order Information sheet
- Enter *Out* as the Download directory
- Enter *In* as the Upload directory
- Select *US SAN Agency (31B)* as the Qualifier
- Enter *1697684* as the SAN ( Brodart's *Standard Address Number* )
- Check *Order enabled*
- Check *Invoices enabled*

New account

Vendor: 

Brodart

Plugin: 

Edifact - Brodart

Description: 

Brodart EDI

Transport: 

FTP

Remote host: 

ftp.brodart.com

Username: 

username

Password: 

password

Download directory: 

Out

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

Upload directory: 

In

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

Qualifier: 

US SAN Agency (31B)

SAN: 

1697684

Quotes enabled: ☐

Orders enabled: ☒

Invoices enabled: ☒

Responses enabled: ☐

Automatic ordering: ☐

With automatic ordering quotes generate orders without staff intervention.

Figure 2. EDI vendor record creation form

## Create Brodart Account Records (EANs)

Create an EAN for each unique Brodart account number on the attached EDI Order Information sheet. “Spec codes” are to be entered as the first character of the basket name, sent as the purchase order number, to further define processing.

- 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
- Select *Brodart* as the Vendor
- Select your library from the library pulldown
- Enter a “Brodart account number” from the Brodart EDI Order Information sheet
- Select *US SAN Agency (31B)* as the Qualifier

**New EAN**

**Library:** Select Your Library ▼

**Description:** Brodart - Flex Cataloging and Processing

**EAN:** Brodart Account

**Qualifier:** US SAN Agency (31B) ▼

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 following information into the data entry box

```
homebranch: 946$a
holdingbranch: 946$a
budget_code: 946$f
itype: 946$y
ccode: 946$t
loc: 946$8
quantity: 946$q
price: 946$p
replacementprice: 946$p
itemcallnumber: 946$n
notforloan: 946$7
```

- 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> homebranch: 946\$a holdingbranch: 946\$a budget_code: 946\$f itype: 946\$y notforloan: 946\$l ccode: 946\$t loc: 946\$8 quantity: 946\$q price: 946\$p replacementprice: 946\$p itemcallnumber: 946\$n </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 - Brodart” 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 Brodart has provided you
    - Fields to send in
      - Header: checked
  - Library EAN
    - NAD+BY: checked
  - File suffixes
    - Order file: ord
    - Invoice file: inv
  - LIN values:
    - EAN: checked
    - ISBN: checked
  - ISBN options
    - Force the user of the first ISBN if sending ISBN in the LIN segment: checked
  - PIA values

- EAN: checked
- ISSN: checked
- ISBN-10: checked
- ISBN-13: checked
- UPC: checked
- Product ID: checked
- GIR values:
  - Mapping

```

LL0: homebranch
LST: itype
LSC: ccode
LSL: location
LSB: biblionumber
LSI: itemnumber
LSF: budget_code
LSN: itemcallnumber

```

- Other ORDER configurations
  - Send basket name: checked
- Other INVOICE configurations
  - Shipping budget from order line: checked
  - Shipping - MOA+8: checked
  - Close invoice on receipt: checked (*optional*)
  - Add item note receipt: checked (*optional*)
- Click *Save Configuration* button.

Figure 5. Plugin configuration, 1 of 2

Figure 6. Plugin configuration, 2 of 2

## Bibz to Koha and EDI Release Workflow

- Download the On Order records from Bibz
- 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 Brodart



- Submit EDI order from Koha
- Delete the cart from Brodart's site.