

Add Records

There are various methods that can be used to add order records to selection lists or purchase orders. Brief records can be created manually, order records from vendors can be loaded, Evergreen reports can be used to identify and load records from the catalog, and the OPAC's View/Place Orders button for Staff can be used to add records to a selection list or purchase order.

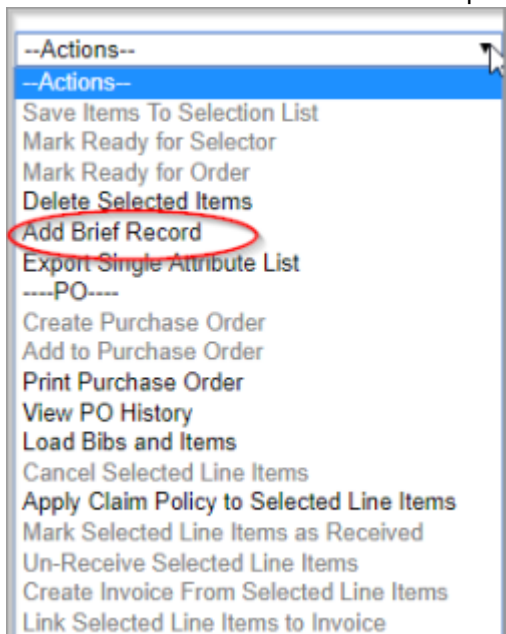
Brief Records

Brief records are short bibliographic records with minimal information that are often used as placeholder records until items are received. Brief records can be added to new or existing selection lists or to new or pending purchase orders.

Add a Brief Record to an Existing Selection List or Purchase Order

Adding brief records to a selection list or purchase order is largely the same process.

1. Open your selection list (via Acquisitions→My Selection Lists) or your purchase order (via Acquisitions→Purchase Orders.)
2. From within the selection list or purchase order, select **Actions→Add Brief Record**.



3. Enter the bibliographic information into the desired fields and click **Save Record**.

New Brief Record

Adding to Purchase Order	<input type="text" value="1319"/>
Estimated Price	<input type="text"/>
Language of work	<input type="text"/>
Pagination	<input type="text"/>
ISBN	<input type="text"/>
Author of work	<input type="text"/>
Publisher	<input type="text"/>
Publication Date	<input type="text"/>
Edition	<input type="text"/>
UPC	<input type="text"/>
Publisher Number	<input type="text"/>
Title of work	<input type="text"/>
Identifier	<input type="text"/>
ISSN	<input type="text"/>



Title is a required field. Depending on the type of item, ISBN, ISSN or UPC are required.

4. The new line item has now appeared on your selection list or purchase order. However, do note that beneath the title you will see "link to catalog."

	A Wrinkle in Time
	Madeleine L'Engle 9780374386139
Order Identifier	ISBN <input type="text" value="9780374386139"/>
# 101003 00	link to catalog worksheet requests view invoice(s)

You will need to link this line item to a record in the catalog.



<fc #ff0000>If you do not link this to a record in the catalog, your order will not activate.</fc>

(See: [Link Line Items to the Catalog.](#))

Create a Brief Record and Add it to a Selection List

1. Select the New Brief Record toolbar button OR Select Acquisitions→New Brief Record from the Menu Bar.
2. From the Add to Selection List drop down menu, choose a selection list or enter the name of a new selection list in the field.



The drop down menu displays the ten selection lists most recently edited that are owned by the user.

3. Enter the bibliographic information into the desired fields and click Save Record.
4. A new line item appears on your selection list.

Add a Brief Record to Purchase Order

1. Open or create a purchase order. See [creating a purchase order](#) for more information.
2. Click the *Add Brief Record* button
3. Enter bibliographic information in the desired fields and click *Save Record*.
4. A new line item appears on your purchase order.



Copies will be automatically added to the line item if you have set a default number of copies for the provider.

5. To add additional brief records, select *Actions*→*Add Brief Record* for each additional record you wish to add.

View/Place Orders

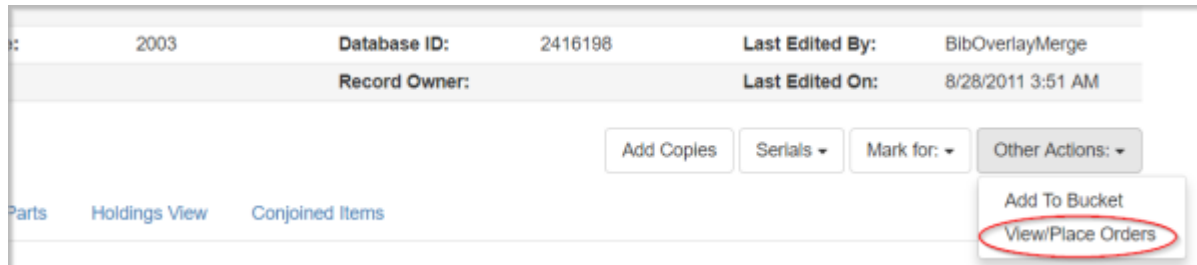
You can use **View/Place Orders** to easily order additional copies of an item that is already in the catalog.



Load Catalog Record IDs is more effective when working with a list of additional copies of titles to be ordered.

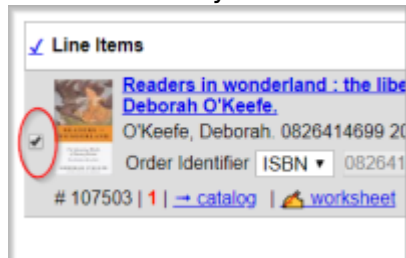
One example use of View/Place Orders is to reorder a title that you already own that may have been damaged or lost.

1. Open the bibliographic record of the title you wish to purchase.
2. Select the **Other Actions** menu, and choose **View/Place Orders**.



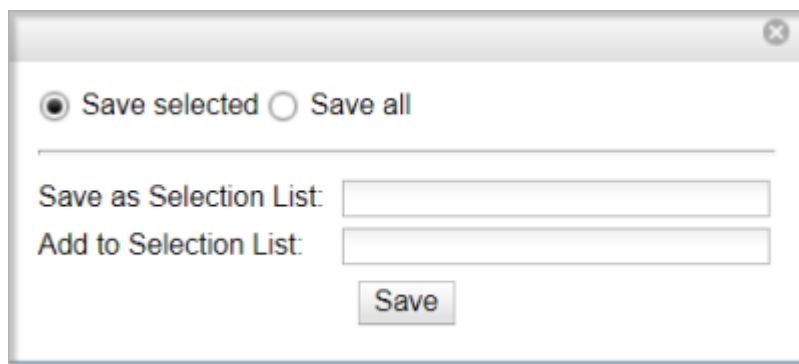
3. It should open a new tab in your browser. From here you should see the title, and buttons to **Add to Selection List**, **Add to Purchase Order**, or **Create Purchase Order**.

4. Click the ticky box next to the line item, and then choose one of the following options-



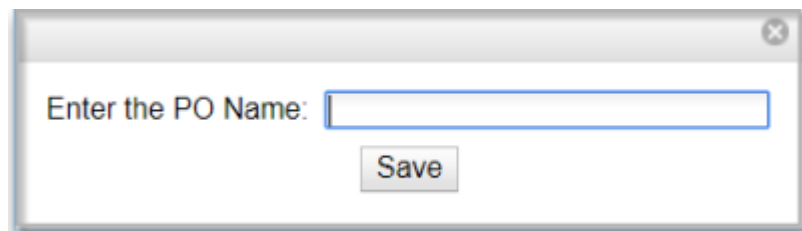
<fc #ff0000>**Add to Selection List**</fc>

Clicking this button will bring up a pop-up. Choose either *Save as Selection List* and type in the name of a NEW selection list, or *Add to Selection List* and type in the name of an EXISTING selection list created by any user at your library. This is a predictive text field and will start to auto-populate options as you start typing.



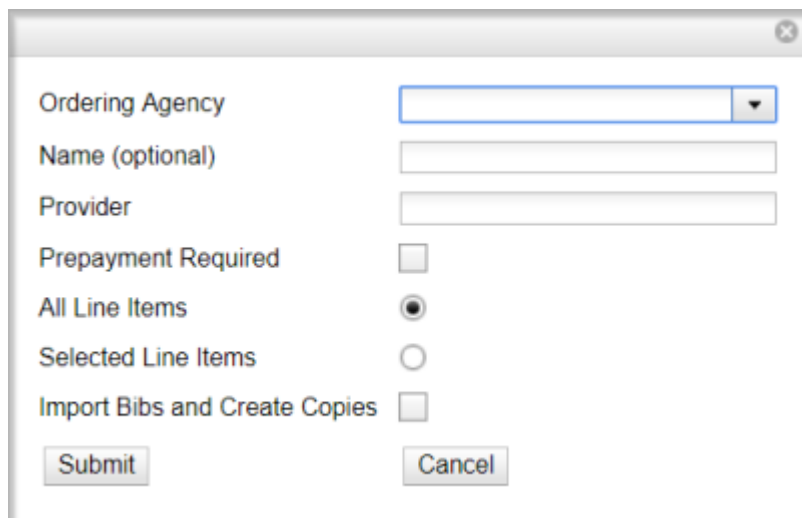
<fc #ff0000>**Add to Purchase Order**</fc>

This will bring up a pop-up. Fill in the purchase order NAME of an existing pending purchase order that you would like to add the title to. This is a predictive text field will start auto-populating as you type.

A small dialog box with a title bar containing a close button. The main area contains the text "Enter the PO Name:" followed by a single-line text input field. Below the input field is a button labeled "Save".

<fc #ff0000>**Create a Purchase Order**</fc>

This will bring up a pop-up to create a new purchase order. Ordering Agency and Provider are required fields. Once you have completed the form, click Submit.

A dialog box for creating a purchase order. It contains several fields: "Ordering Agency" (a dropdown menu), "Name (optional)" (a text input field), "Provider" (a text input field), "Prepayment Required" (a checkbox), "All Line Items" (a radio button), "Selected Line Items" (a radio button), and "Import Bibs and Create Copies" (a checkbox). At the bottom are two buttons: "Submit" and "Cancel".

Load Catalog Record IDs

The Load Catalog Record IDs function enables you to create line items from a list of catalog records whose record IDs are saved in a CSV file.

This is useful if you want to order copies of items that your organization already owns. For example, you run a copy/hold ratio report to identify how many copies you have available compared to the number of holds that are on your Hot Fiction display. You decide that you want to order an extra copy of six titles. Your copy/hold ratio report includes the record ID of each title. You can save the record IDs into a CSV file, upload the file into Evergreen, and create a purchase order for the items.

Record IDs are auto-generated digits associated with each record. They are found in the *Record Summary* that appears at the top of each record in the catalog.



If you only want to order additional copies of one or two titles then using View/Place Orders is faster.

1. Create a CSV file with the record ID of each catalog record in the first column of the spreadsheet. You can create this CSV file from a spreadsheet generated by a report, as suggested in the aforementioned

example. You can also copy and paste record IDs from a catalog record into a spreadsheet that you then save as a CSV file.

2. Save the CSV file to your computer.
3. In Evergreen, select *Acquisitions→Load Catalog Record IDs*.
4. Click *Load More Terms*.
5. Locate the desired file and click *Open*.
6. The screen will display the number of terms (record IDs) that have been loaded. Clicking *Load more terms* again will allow you to load an additional file of record IDs.
7. Click *Retrieve Records*.
8. The records will appear as line items.
9. You can save the line item(s) to a selection list, create a purchase order or add to a purchase order.
 1. Save the line item(s) to a selection list by checking the box(es) adjacent to the desired line item(s) and selecting *Actions→Save Items to Selection List*.
 2. Either *Save as Selection List* and type in the name of a new selection list, or *Add to Selection List* and type in the name of any existing selection list created by any user at your library.
 3. Create a purchase order from the line item(s) by checking the box adjacent to the desired line item(s) and selecting *Actions→Create Purchase Order*.
 4. Add the line item to an existing purchase order by checking the box adjacent to the desired line item(s) and selecting *Actions→Add to Purchase Order*.

Load MARC Order Records

Load MARC Order Records is the main method of loading bib records into the database and creating either a selection list and/or purchase order.

Load MARC Order Records is also colloquially as “LMOR” or “Vandelay.”

It is located via **Acquisitions→Load MARC Order Records**.

Prerequisites

There are a few prerequisites for using the Load MARC Order Records page.

1. You must have already [created at least one provider](#)
2. You must have already [created at least one fund](#)
3. You must have already set up [MARC downloads](#) in your vendors' website(s)
4. PINES staff must have already set up your 962 holdings tags in your provider profile(s)

5. *[If using grids]* Grid info from vendor websites **must exactly match branch and fund** (if applicable) info in Evergreen

Vandelay Settings

Upload

Create Purchase Order

☐

Activate Purchase Order

☐

Provider

Context Org Unit

Add to Selection List

Fiscal Year

Upload to Queue

Or create a new queue

Record Match Set

Merge Profile

Import Non-Matching Records

☒

Record Source

Merge On Exact Match (901c)

☐

Merge On Single Match

☐

Merge On Best Match

☒

Best/Single Match Minimum Quality Ratio

New Record Quality / Quality of Best Match

Insufficient Quality Fall-Through Profile

Load Items for Imported Records

☐

File to Upload:



The fields shaded in pink are **<fc #ff0000>required</fc>** fields. If you neglect to fill out these fields, you will either immediately receive an error message or your upload will not process correctly. The fields shaded in yellow depend on what kind of upload you are doing.

To create a purchase order but no selection list:

- Check “Create Purchase Order”
- Leave “Add to Selection List” blank

To create a selection list but no purchase order:

- Leave “Create Purchase Order” unchecked
- Select an already created selection list from the “Add to Selection List” drop-down box

To create a purchase order and add to a selection list:

- Check “Create Purchase Order”
- Select an already created selection list from the “Add to Selection List” drop-down box

The secondary portion of the LMOR screen are all settings defined by PINES. These fields are all sticky, so you should only have to set them once and they will already be set the next time you access the screen. Your page should match the settings below:

Record Match Set	PINES General Match Set ▼	
Merge Profile	Match-Only Merge ▼	
Import Non-Matching Records	<input checked="" type="checkbox"/>	Record Source Acquisitions Import ▼
Merge On Exact Match (901c)	<input type="checkbox"/>	
Merge On Single Match	<input type="checkbox"/>	
Merge On Best Match	<input checked="" type="checkbox"/>	
Best/Single Match Minimum Quality Ratio	0.0	New Record Quality / Quality of Best Match
Insufficient Quality Fall-Through Profile	Match-Only Merge ▼	
Load Items for Imported Records	<input type="checkbox"/>	

Record Match Set: PINES General Matchset

Merge Profile: Match-Only Merge

Import Non-Matching Records: [checked]

Record Source: Acquisitions Import

Merge on Exact Match (901c): [unchecked]

Merge on Single Match: [unchecked]

Merge on Best Match: [checked]

Best/Single Minimum Quality Ratio: 0.0

Insufficient Quality Fall-Through Profile: Match-Only Merge

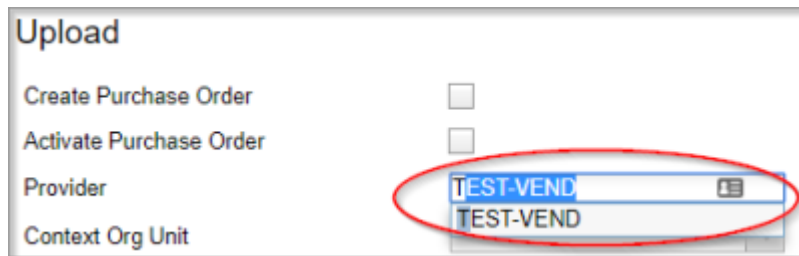
Load Items for Imported Records: [unchecked]

Performing an Upload

To upload a MARC file that you have downloaded from your vendor, you may open Vandelay by going to **Acquisitions→Load MARC Order Records**.

Review the section above on [Vandelay Settings](#) to ensure your settings are correct for the type of upload you will be doing.

Provider: This is a predictive text field; you may type the first few letters of one of your providers' codes to locate the provider.



Upload

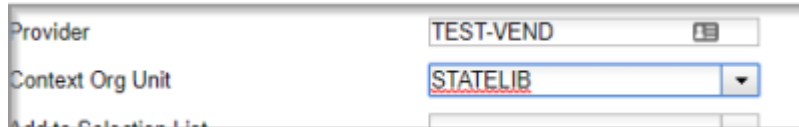
Create Purchase Order ☐

Activate Purchase Order ☐

Provider **TEST-VEND**

Context Org Unit

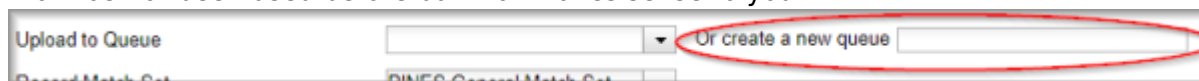
Context Org Unit: Should be set at your system level.



Provider TEST-VEND

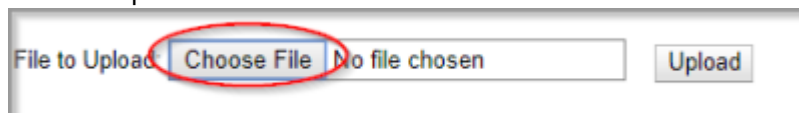
Context Org Unit STATELIB

Or create a new queue: As noted above, this is a required field. Name the queue something unique that has not been used before but that makes sense to you.



Upload to Queue Or create a new queue

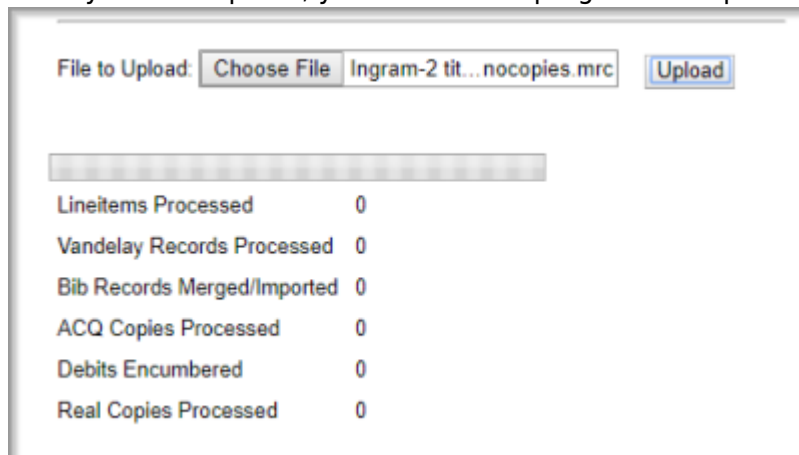
File to upload: Click "Choose File" to open your Windows folder explorer and locate your MARC file that is to be uploaded.



File to Upload **Choose File** No file chosen

Click **Upload**.

Once you click Upload, you will see the progress bar spinning.



File to Upload: Ingram-2 tit...nocopies.mrc

Progress Bar

Lineitems Processed	0
Vandelay Records Processed	0
Bib Records Merged/Imported	0
ACQ Copies Processed	0
Debits Encumbered	0
Real Copies Processed	0

If your upload is smaller (less than 10 titles or so), you will probably receive the confirmation that your upload is complete below the spinning progress bar.

File to Upload:

Choose File

Ingram-2 tit...nocopies.mrc

Upload

LineItems Processed	4
Vandelay Records Processed	2
Bib Records Merged/Imported	2
ACQ Copies Processed	0
Debits Encumbered	0
Real Copies Processed	0

Upload Complete!

[View Purchase Order](#)

[View Import Queue](#)

If your upload is larger or a fair amount of time has gone by and you have not received the confirmation links, review the section below to check and see [if your upload is complete](#).

Checking if Queue is Complete

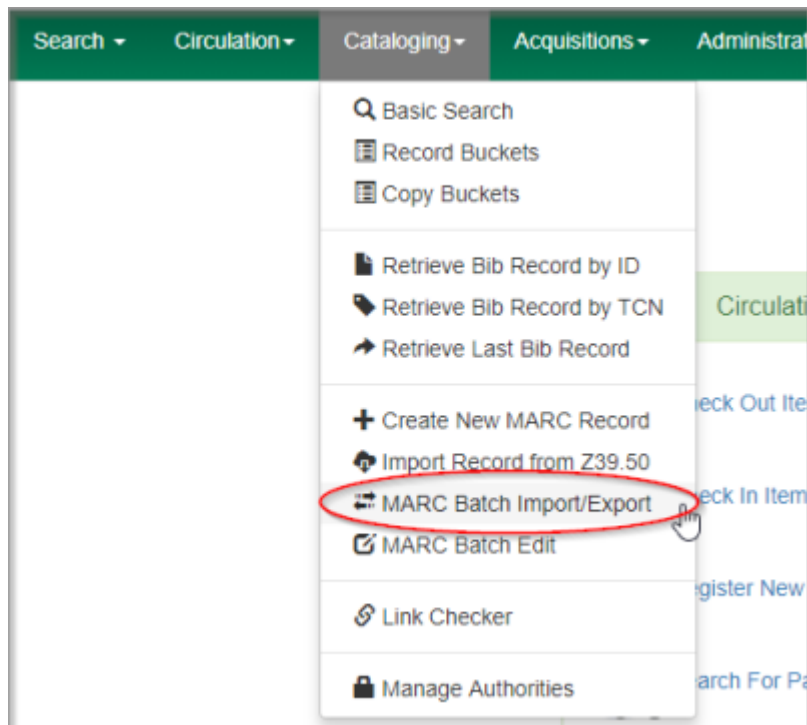
As of July 2018, there is an ongoing bug affecting PINES where doing larger (10+ titles) uploads, the LMOR screen does not update when the upload is complete. The upload progress bar remains running indefinitely.

As a workaround, you are able to check if your queue is complete before searching for it via the Purchase Order or Selection List searches.

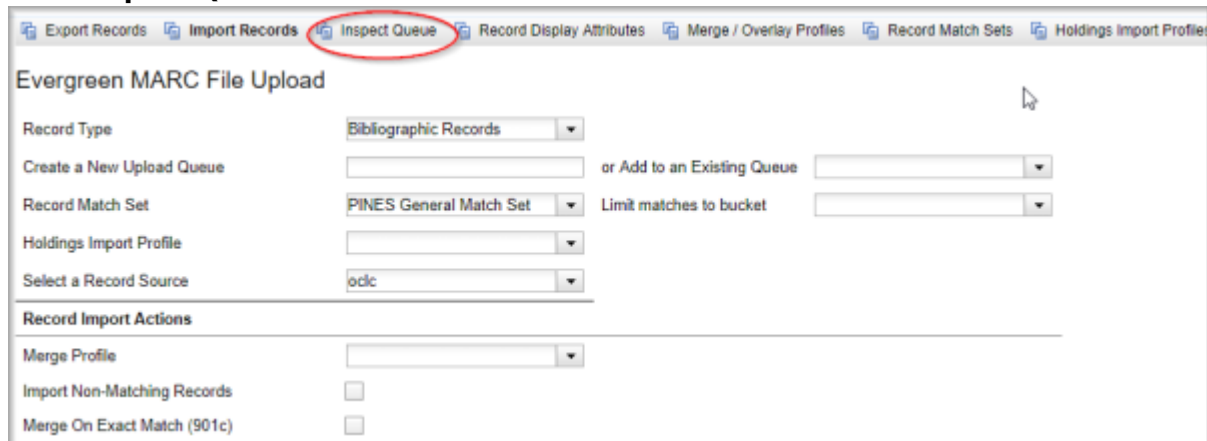
After beginning your upload, and giving it a few minutes (5+), you may continue with these instructions.

Open a new tab in Evergreen. Leave your tab open that has your upload running.

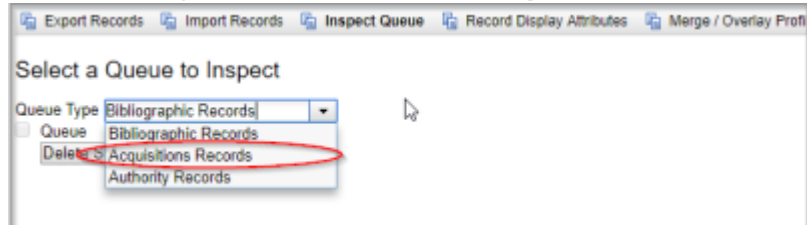
From this new tab, select **Cataloging→MARC Batch Import/Export**.



Click **Inspect Queue**.



From the drop-down menu, choose **Acquisitions Records**.



From this screen, you will see a list of your queues. Click on the queue of your current upload.

Select a Queue to Inspect

Queue Type Acquisitions Records

☐ Queue

☐ [dning217](#)

☐ [IngAF020916](#)

☐ [Ic021116mwdvd](#)

☐ [In021116mwdvd](#)

☐ [test3](#)

☐ [testingqueue4](#)

☐ [testqueue1](#)

☒ [testqueue10](#)

☐ [testqueue11](#)

☐ [testqueue12](#)

☐ [testqueue5](#)

☐ [testqueue6](#)

☐ [testvend2](#)

From here you will see more information about your queue. Primarily you are interested in two numbers in the Queue Summary: Records in Queue and Records Imported.

Queue *In021116mwdvd*

Queue Actions	Queue Summary	Queue Filters
Import Selected Records	Records in Queue: 8	Limit to Records with Matches <input type="checkbox"/>
Import All Records	Records Imported: 8	Limit to Non-Imported Records <input type="checkbox"/>
View Import Items	Record Import Failures 0	Limit to Records with Import Errors <input type="checkbox"/>
Export Non-Imported Records	Items in Queue 0	
Delete Queue	Items Imported 0	
Copy To Bucket	Item Import Failures 0	

<input type="checkbox"/>	View MARC	Matches	Import Failures	Import Time	Imported As	Title	Author	Language	Pagination
<input type="checkbox"/>	View MARC	Matches (1)		2/11/16	5718595	LONGMIRE - THE COMPLETE THIRD			2 videodiscs (ca. 441

Records in Queue is the total number of titles that your upload contains. **Records Imported** is the number of titles that have been processed. When the two numbers are the same, your upload is complete.

Once your queue is complete, you may close the tab with your upload.

If you did an upload that created a purchase order, you may locate your new purchase order by going to **Acquisitions→Purchase Orders** and doing the following search:

Acquisitions Search

Search for matching of the following terms:

PO - Ordering Agency [is] [YOUR SYSTEM]

PO - Creation Time [is] [TODAY'S DATE]

If your upload included a selection list, you can locate your selection list by going to **Acquisitions→My Selection Lists**.

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Last update: **2019/04/11 22:48**

