Considering a New Vendor

When considering a new vendor, there are a few questions that are useful to ask.

The shortlist of questions might be:

1. Do they offer brief MARC records?
2. Can those records contain, at a minimum, discount price and quantity in the 9xx field?
3. Can those records contain holdings information like branch or fund codes?
4. How would you receive those MARC records? Is it a download link from a cart that you build on their site, or do you have to request them from someone at the company?
5. Do they do EDI ordering?
6. Have they done EDI ordering with any other customers using the Evergreen ILS?
7. For EDI, do they do orders, order acknowledgements, and invoices, or only ordering?

The answers to these aren't necessarily deal-breakers, but it is good to know what's possible and what's not.

MARC Records

There are only a few vendors that are allowed to do outsourced cataloging for PINES libraries. The list of approved vendors is **here**.

If the vendor in question is not on the list, they will not be doing cataloging for the library. If you want a vendor who is not already on this list to do copy or original cataloging for your materials, they will need to be evaluated by the PINES Cataloging Specialist. See **Vendor Evaluating Procedure for Copy and Original Cataloging for PINES** for more details on that process.

The library only needs brief MARC records purely to load into the Acquisitions system.

Additionally, unless the library is specifically requesting to have processing (with no cataloging) done, a processing profile should not be necessary.

9xx field

PINES uses the **962** field to import price, quantity and holdings information into Evergreen. These instructions are only pertinent for vendors who are able to offer "customized" MARC records that include price, quantity, etc.

Subfield	Description	Note
a	Alert message	
b	Owning library	
c	Shelving location	Should always be ON ORDER.

Subfield	Description	Note
f	Fund code	
g	Circulation modifier	
n	Line item note	
p	Price	Discount price, if possible. Do not include a currency symbol.
q	Quantity	

If the vendor will be setting up your 9xx field, they should adhere to using the 962 field and the listed subfields. If using the 9xx field, **price** and **quantity** are the minimum. Beyond that, only **owning library** and **fund code** are commonly used, although the others are acceptable to use.

Subfields that contain no data should either:

- Not be passed into the MARC record at all *OR*
- Must contain a character of any type.

> ⚠ Subfields cannot remain empty or the order upload into Acquisitions will fail.

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