

Providers

Each provider profile represents a vendor account. Each vendor account used in the acquisitions process needs a provider profile. This profile contains information pertaining to contacting the provider, claiming, EDI, and holdings subfields. Providers can be edited should information change.



If you are using EDI with a particular provider and you have multiple accounts, each account will need its own provider profile.

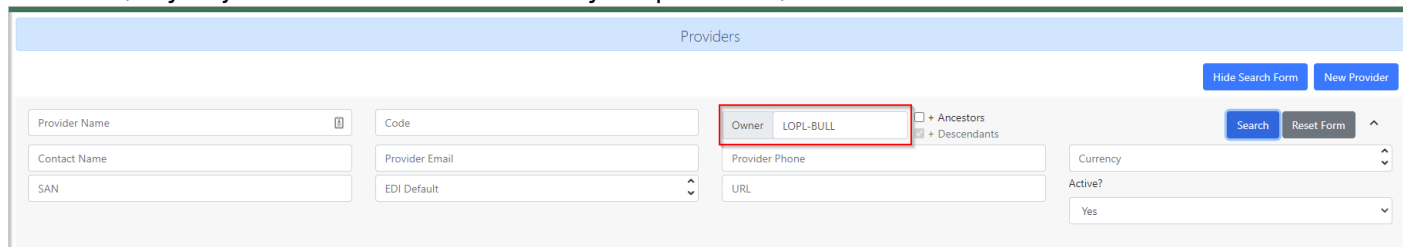
An ongoing list of vendors who offer MARC downloads and/or EDI ordering is [here](#).

Searching providers

The Providers interface is accessed through **Administration→Acquisitions Administration→Providers**.

Once there, the providers search page will load.

There are several different search terms you can use if you're searching for a particular provider. However, if you just want to see a list of all your providers, the main search term to notice is the Owner.



The screenshot shows the 'Providers' search interface. It features a header bar with the title 'Providers' and two buttons: 'Hide Search Form' and 'New Provider'. Below the header is a search form with several input fields: 'Provider Name' (with a dropdown icon), 'Code', 'Owner' (highlighted with a red box and containing 'LOPL-BULL'), 'Contact Name', 'Provider Email', 'Provider Phone', 'SAN', 'EDI Default', and 'URL'. There are also checkboxes for '+ Ancestors' and '+ Descendants'. On the right side, there are dropdown menus for 'Currency' and 'Active?' (set to 'Yes'). A 'Search' button and a 'Reset Form' button are located at the bottom right of the form.

This will default to your workstation library every time you open the page. In my screenshot, it's defaulted to LOPL-BULL because that's my workstation I'm logged into. However, there aren't any providers owned by LOPL-BULL, they're owned (in this case) by LOPL. So if I change the owner to LOPL and hit the blue Search button, it will now show me a list of all of my active providers.

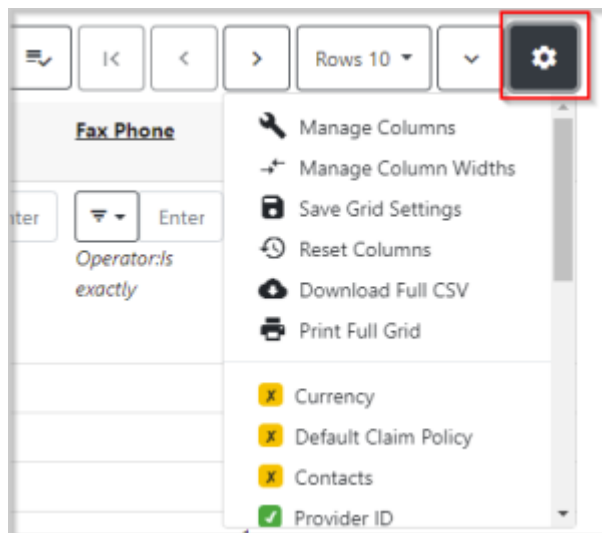


The search defaults to only show active providers. If you're searching specifically for an inactive provider, you can just change the value in the Active? search box to "No".

Like many other places throughout the staff client, the results are in a grid which can be manipulated to your preference.

By clicking the gear icon at the top right of the grid, you can change which columns default to be visible.

If you click “Manage Columns”, you can uncheck any columns that you don't normally want to see, as well as arrange them in whatever order you like.



I also recommend increasing the number of visible rows, which can be done by clicking the “Rows 10” button to the left of the gear and increasing the number of visible rows.

Once you're happy with how your grid is set up, make sure to click the gear icon and choose “Save Grid Settings.” Your grid configuration will now be the same each time that you open the Providers page, and will follow your login even if you move to another device.

Provider Details Pages

Once you've created or retrieved a provider, the provider's details pages will open.

The main page shows the basic information about the provider—what was entered when the provider was created.

Tabs

You'll also notice that there are several tabs toward the top: Provider-Addresses-Contacts-Attribute Definitions-Holdings Definitions-EDI-Invoices-POs. Each of these tabs will take you to different information about this provider.

Set Default View

To the right there is a gray button called "Set Default View." If you click this while within one of the sub-tabs like Addresses, Contacts, etc., it will set that tab as your "default." This means that anytime you open any provider, it will automatically open to that sub-tab.

So if you wanted to set the POs tab as your default, anytime you opened a provider it would automatically open to the POs tab instead of the main info tab for the particular provider.

Show Search Form

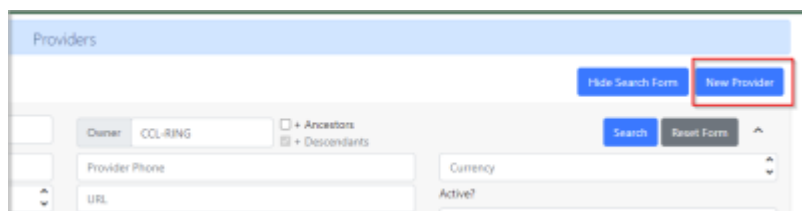
While in a provider profile, you will always be able to access the blue "Show Search Form button." If you click this button, it will reopen your search results grid above the provider profile.

So if you clicked on the wrong provider, for example, or just wanted to go to the next on the list, without needing to re-run your search, you could click "Show Search Form" and your previous search results would appear.

Create a provider

Providers must be created in the Acquisitions module before users can create purchase orders for providers.

1. Select Administration→Acquisitions Administration→Providers.
2. Click New Provider.



3. Fill in the fields.

- **Active** (*required*) - This is checked by default, and should remain checked. Unchecking this box deactivates the provider. Providers must be active in order for purchase orders to be created from that provider.
- **Provider name** (*required*)
- **Code** (*required*) - Create a unique code for the provider. No character limit.



This code is used throughout Acquisitions to identify the provider, so make sure it's intelligible.

- **Currency** (*required*) - The currency the provider is paid in.
- **Default claim policy** - Leave blank.
- **Default # Copies** - Optional. Enter the default number of copies, if desired. When line items are added to purchase orders for this provider, if you fill in a number here that number of copies will automatically be created.
- **EDI Default** - Leave blank, it will be entered by PINES staff
- **Owner** - This will default to your workstation library. Make sure to change this to your normal ordering agency.
- **URL** - Optional. The Web address for the provider's website
- **SAN** - Leave this blank, it will be entered by PINES staff
- **Prepayment required** - Check the box if the provider requires payment before goods are received. Otherwise leave unchecked.

4. Click Save.

5. When you click Save, the page will go ahead and load you into the details pages for your new provider.



After you've created your new provider, make sure to add your **Holdings Subfields** as well.

The other tabs (Addresses, Contacts and Attribute Definitions) are optional. The EDI tab is for PINES staff use only.

Edit or Open Provider

To access information about an existing provider, you can open its details page two different ways.

1. Once you have your list of providers, you can right-click on the row of the provider that you want to retrieve. Then from the menu that appears, choose "Retrieve Provider."
2. You can also double-click on the row of the provider and it will open its details page.

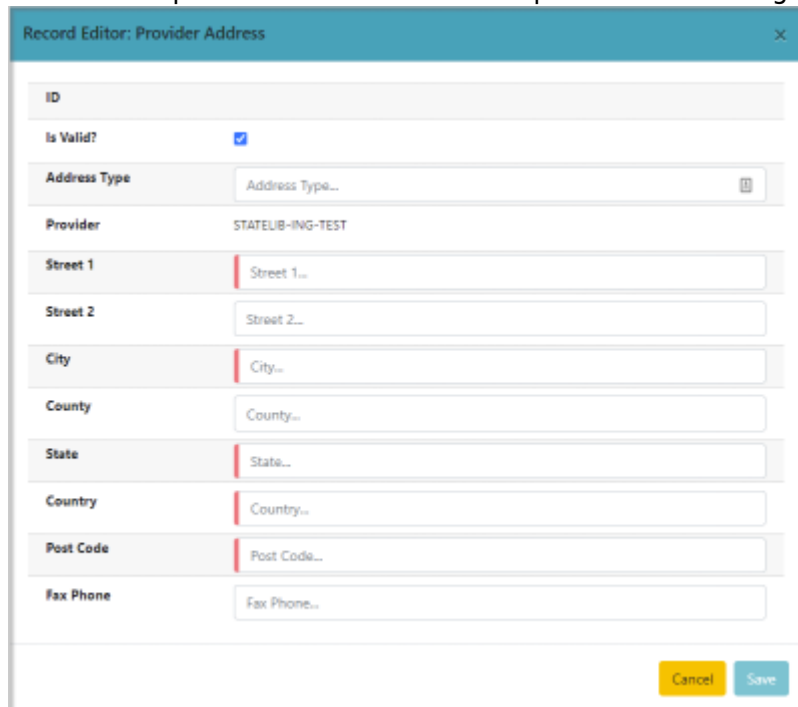
Addresses

A provider's address appears on printed purchase orders and invoices for that provider. Adding an address for a provider is optional.

To add a new address:

After retrieving the provider

1. Click on the Addresses sub-tab.
2. Click the “New Provider Address” white button.
3. This will open the address editor. Required fields are highlighted in red.



It is not necessary to fill in Address Type.

4. Click Save.
5. If you ever need to edit or delete an address, you can right-click on the address and choose either Edit Selected or Delete Selected.

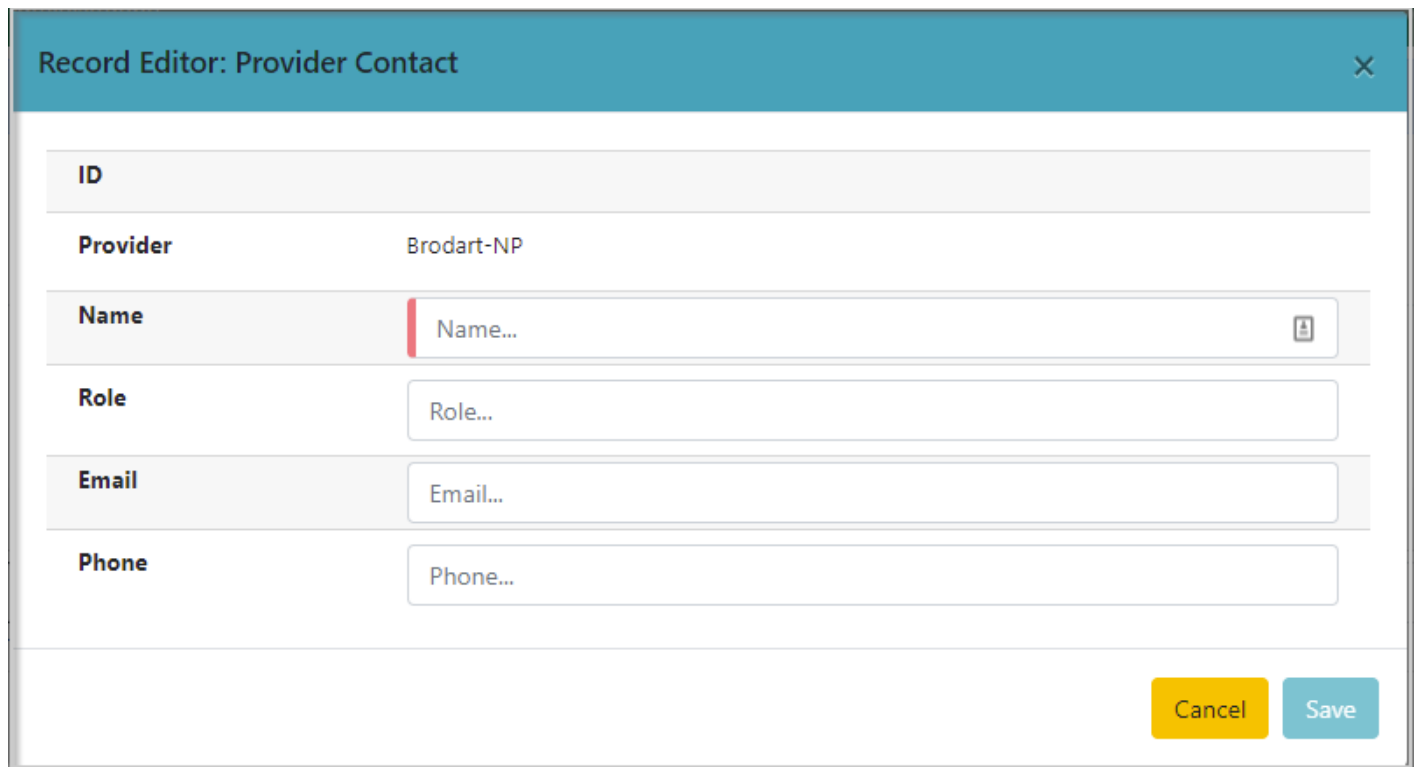
Contacts

Contact information can be added to a provider profile. For example, if you wanted to add contact information for your sales rep, it could be added here in Acquisitions. Adding contact information is optional.

To add a contact:

After accessing provider profile


1. Click the Contacts tab.
2. Click the white “New Provider Contact” button.



Record Editor: Provider Contact ×

ID

Provider Brodart-NP

Name Name... 

Role Role...

Email Email...

Phone Phone...

Cancel Save

The only required field here is a name. All other fields are optional.

3. Once you've entered the information, click Save.
4. Your grid of contacts will refresh, and you'll now see your new contact in the list.
5. If you have multiple contacts for a provider, you can choose to make a particular one the “Primary Contact.” This does not have an effect elsewhere in Acquisitions, this would purely be for your own information.
6. To set a particular contact as the primary, right-click on the contact and choose “Set as Primary Contact.”

Contact Addresses

If you would like, you can also add an address to a contact.

To add a Contact Address:

After accessing the provider profile

1. Click on the Contacts sub-tab.
2. Left-click once on the contact that you would like to add an address for.

3. You'll notice that a sub-grid appears below your contact.

The screenshot shows a web interface for managing provider contacts. At the top, there are buttons for 'Remove Filters' and 'New Provider Contact'. Below this is a table with columns: #, Email, Phone, Is Primary?, ID, Name, and Role. The first row is selected, showing a contact named 'Hope Daniels' with ID '50' and 'Is Primary?' set to 'Yes'. Below the table, there is a section titled 'Addresses for: Hope Daniels' with buttons for 'Remove Filters' and 'New Contact Address'. Below this is another table with columns: #, Type, Street (1), Street (2), City, County, State, Country, Postal Code, Fax Phone, and Valid Address?. The table is currently empty, and a message 'Nothing to Display' is shown at the bottom.

4. You can now click on the white “New Contact Address” to add an address for your contact.

Attribute definitions

Not currently in use by PINES libraries.

Holding definitions

Holding definitions, also commonly called holdings subfields, are used with a 962 Holdings Tag to allow you to import price, quantity and grids information from your downloaded vendor carts. Each time you create a new provider, you **must** set up the holdings subfields otherwise your information will not be imported when you upload your carts.

After accessing the provider

1. Click on the Holdings Definitions tab.
2. Enter “962” in the Holdings Tag field and click the blue Save button next to it.

The screenshot shows a form with a label 'Holdings Tag' and a text input field containing the value '962'. To the right of the input field is a blue button labeled 'Save'. Below the input field is a button labeled 'New Holdings Subfield'.

3. Click the white “New Holdings Subfield” button. This will open the screen to create a holdings subfield.

This is where you're going to specify which subfields Evergreen uses to look for the price / quantity /

branch / etc. when you upload your carts. You *must* follow the letters below, or your carts will not import the info correctly.

Name	Subfield	Required?
Quantity	q	Required
Price	p	Required
Branch	b	Required if using grids
Fund	f	If using fund in grids

5. Choose the attribute you're starting with (like Quantity) and choose it from the list. Then enter the appropriate letter in the Subfield field, and hit Save.



Enter **only** the letter, in lowercase.

The page will refresh, and you'll see a list of holdings subfields.

6. Repeat the process until you've finished adding all of your holdings subfields.

EDI

This tab is used only by PINES staff. Do not edit.

Invoices

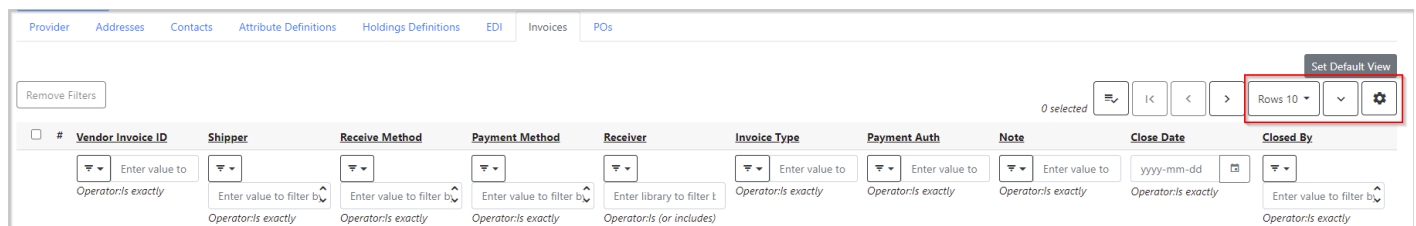
The Invoices tab is similar to the normal Invoices Search that's accessed through **Acquisitions→Invoices**. The only difference is that this grid listing of invoices is already pre-scoped to only show invoices for the specific provider that you're viewing.

This can be beneficial for smaller providers, but it does somewhat lack the flexibility of searching. There are sortable grid filters that can be used to narrow down results, however, if you prefer that method.

The list of invoices is sorted from Oldest→Newest, so if you have one of your main providers that you've been using for a long time, you'll definitely want to use the filters when using this sub-tab.

Of note, you'll notice that since this is a grid, the same configuration options are available as they were in other Evergreen grids (including the main provider results grid). This includes increasing the number of rows to view, as well as visible columns and column order.

If you want to view one of the invoices in the list, you can click the blue hyperlinked Vendor Invoice ID on a particular invoice. This will open the invoice in a new tab/window.



POs

The Purchase Orders (POs) tab is similar to the Invoices tab. It is a list of purchase orders associated with a particular provider.

Like the Invoices grid, it is sorted in Oldest→Newest order by default. Although you can sort the grid, your sort options are not saved and so you'll need to sort each time you open the sub-tab if you want to see them in a different order.

If you want to view one of the POs in the list, you can click on the blue hyperlinked PO Name on a particular purchase order. This will open the PO in a new tab/window.

Delete a provider

If you would like to delete a provider, the provider must not be associated with any other information first.

To be eligible to be deleted, a provider must not have any:

- Purchase orders
- Invoices
- Addresses
- Contacts
- Contact addresses
- Attribute definitions
- Holdings subfields

If the provider has any associated purchase orders or invoices, it will not be able to be deleted. Instead, you can go to the “Provider” tab in the provider details and uncheck the “Active” box. This will set the provider as inactive, and remove it from being selected for new purchase orders or showing in the default list of providers.

If the provider does not have any associated purchase orders or invoices, and you have already removed the other qualifying information, it can be deleted.

To delete a provider:

After accessing the provider

1. On the left side of the screen, beneath the provider summary, there is a blue “Delete Provider” button.



If the provider is not eligible to be deleted, the blue button will be greyed out.

2. Click the “Delete Provider” button.
3. You will get a confirmation message, and once you confirm to delete, the page will refresh with your list of active providers.

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