Training

POLARIS ACQUISITIONS EDI SETUP CHECKLIST

The following checklist is meant to be a guide to help you setup EDI for the Polaris System.

The following steps are to be completed by IT staff or system coordinator to setup Polaris EDI.

- ☐ Verify that your library can send and receive files via FTP (only needed for non-hosted libraries - hosted libraries should already have all the necessary ports open bi-directionally for FTP by default)
- ☐ Determine if EDI files should be transmitted in active or passive mode
- ☐ Set the transmission mode to active or passive in Polaris Administration (passive mode is set by default) (System| Parameters| Acquisitions/Serials|Transmit EDI files in passive mode FTP)
- ☐ Grant permissions to staff who send EDI orders, import records, PO, receiving, and invoicing related permissions.
- ☐ Enter the library SAN in the Branch workform – in Administration select Branch, enter SAN information.
- ☐ Set EDI invoice defaults – at system, library, or branch level
- ☐ In the Email addresses box, type the e-mail addresses of staff members to whom you want invoice details sent. Separate multiple email addresses with a semicolon. Do not enter a semicolon after the last email address.
- ☐ If your library will be generating on-order items with call numbers pulled from the linked bibliographic records, verify that the Polaris Administration Cataloging profile, Bring call number fields from bib to item record when link is made is set to Yes.

The following steps are to be completed by technical services/acquisitions staff:

- ☐ Contact your suppliers that accept Polaris EDI orders, use the information below to populate supplier's record in Polaris:
    - Supplier's Standard Address Number (SAN)
    - Supplier's account number
    - Username

- Password
- FTP address
- Purchase order directory
- Purchase order acknowledgment and invoice directory
- Purchase order file extension

☐ Verify that the supplier accepts Polaris Enriched EDI orders. (Only for libraries that use Enriched EDI)

☐ Ask supplier if they can send ASN orders (Only for libraries that use ASN)

☐ Setup grid on vendors' website

Note: The collection information, material type, and non-public note are not required to create a segment.

- $l - location (Polaris branch abbreviation)
- $q – quantity
- $f - fund (Polaris fund name or fund alternative name)
- $c - collection (Polaris collection abbreviation)
- $p – price
- $m - material type (Polaris material type name or code)
- $n - non-public note (appears on the Instructions to Supplier view of the Purchase Order Line Item workform
- $h - copy-level code. If the supplier supports copy-level information in subfield h, it is used in the creation of on-order items. The library creates item templates with the copy-level code in the template name. When the purchase order is released, the copy-level codes in the purchase order line item segments are matched to the template code and create the on-order items.

☐ Setup import profile to import bibs with MARC tag 970 to create distribution grid.

- Set up import profiles for standard EDI orders.
- Set up import profiles for Enriched EDI orders (if using)

☐ Set up Polaris Administration parameters and profiles that affect bulk adding:

- Bulk Add to PO: Replace Invalid Fields with Default Data
- Bulk Add to PO - Mark 970 Data as Processed
- Bulk Add to PO: Add Alert to PO line item for multiple ISBNs