
Overview of getting started with Embedded Order Data (EOD) in Voyager

- **Product:** Voyager
 - **Relevant for Installation Type:** Multi-Tenant Direct, Dedicated-Direct, Local, TotalCare
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Question

Overview of getting started with Embedded Order Data (EOD) in Voyager.

Answer

Embedded Order Data processing for Voyager enables a library to create purchase orders automatically based on order details (such as price, fund, and location) embedded in vendor-supplied MARC records. Bibliographic, MFHD, and item records, if desired, can be created at the time the purchase order is created.

Overview

1. Contact the vendor(s) with which you want to use EOD; they have worked with other libraries and can assist you with setting up the necessary procedures at their end. You will need to negotiate file pick-up and drop-off locations on the vendor's servers and determine whether the vendor has any particular file-naming conventions that you need to follow. In addition, because EOD uses MARC data embedded in the imported records to create the POs or other records, careful coordination of MARC field and subfield definitions is necessary.
2. Complete the appropriate set-up in Voyager System Administration. See below.
3. Test! It is a good idea to try test loads with just a few records until you are satisfied that the process is working as desired. Carefully check both the cataloging and acquisitions results of the bulk import.
4. When testing is complete, finalize workflows for obtaining input files/etc.
5. Modify your workflow(s) as necessary to take the best advantage of EOD capabilities. Don't forget, Cataloging as well as Acquisitions workflow(s) will be affected.

System Administration Tasks

- EOD is accomplished via the Voyager "bulk import" function. A new bulk import rule for each combination of vendor, account type, and resulting PO type (e.g., firm order, approval, etc.) must be created. The bulk import rule will govern whether bibs, MFHDs, items, POs, etc. are created.
- The bulk import function relies on a bibliographic duplicate detection profile. An existing duplicate detection profile may be used, but a new duplicate detection rule may be necessary for use with EOD if vendor bibliographic records do not have a standard control number the MARC 035a field. If a different match point, such as a vendor-specific control number in a different MARC field, will need to be used for deduplication, a new profile must be created before the bulk import rule is created. An EOD duplicate detection rule may be shared by several EOD bulk import rules as applicable.
- Both the bulk import rules and duplicate detection rules are created in Voyager's System Administration > Cataloging.

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