Hello Acquisitions API, Goodbye FTP

Wen-ying Lu, Head of Cataloging, Santa Clara University

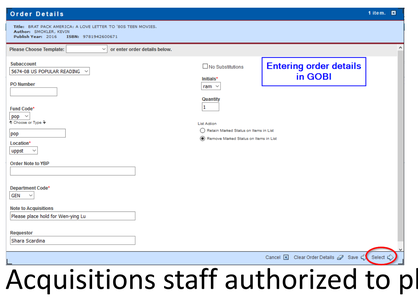
Introduction

Santa Clara University (SCU) started to use GobiExport Plus support to generate bibliographic and order records in Millennium/Sierra and transmitted EDIFACT order records to GOBI in 2012. The process involved many FTP steps. In an effort to streamline workflow, SCU became a beta test partner with Innovative Interfaces, Inc. and GOBI (formerly YBP) for the Acquisitions API (a.k.a. GobiAPI) and fully implemented the API in July 2016.

The API integration with GOBI "is extremely helpful in minimizing the number of steps necessary to order materials, as well as greatly reducing the number of duplicate orders with the help of alerts!" said Shara Scardina, SCU's Collections Specialist.

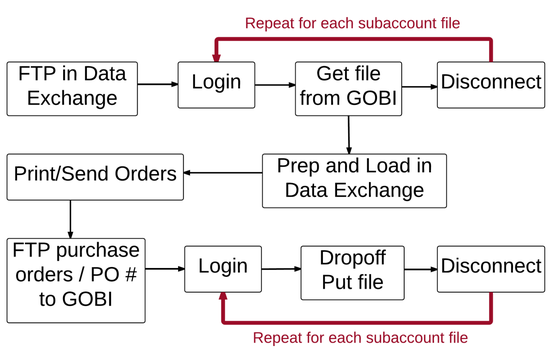
The Workflow

-- Selectors enter order details in GOBI



-- Acquisitions staff authorized to place orders retrieves the selections, reviews order details and places greenlighted order(s), one at a time or as a batch. Then, …

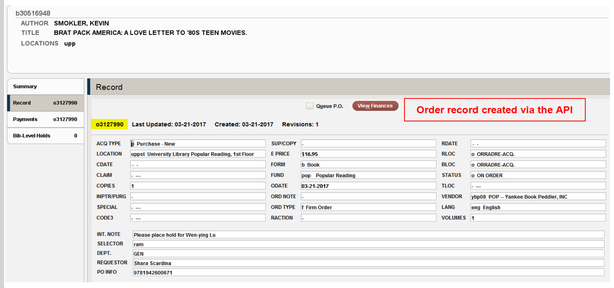
The FTP Route



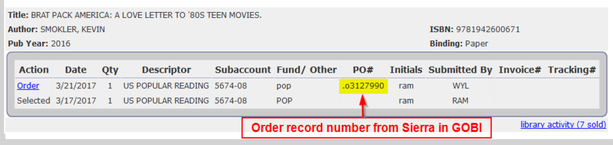
The API Route ★★★★★

DONE! [NO FTP! Labor & time savor!]

In a second or two, bib. and order are in Sierra



PO # populated in GOBI



Behind the Scene

GOBI settings—Customizable—Talk to your GOBI rep.

-- Base account settings Tip: Consider uploading holdings to GOBI

-- U.S. subaccount settings

-- GobiSmart mappings (SCU)

GOBI Field	Displayed?	GobiSmart Custom Label	Sierra API Field
PO Number	Yes	PO Number	Do Not Output
Fund Code	Yes	Fund Code	Fund Code
Initials	Yes	Initials	Selector
Order Notes 1	Yes	Order Note to YBP	Vendor Note (multiples allowed)
Other Local ID	No	Other Local ID	Do Not Output
Location	Yes	Location	Location
Local Data 1	No	Vendor Code	Do Not Output
Local Data 2	Yes	Department Code	Custom Var Field 1
Local Data 3	Yes	Note to Acquisitions	Custom Var Field 2
Local Data 4	Yes	Requestor	Requestor
Subaccount	Yes	Subaccount	Vendor Account Number*
Purchase Option	Yes	Purchase Option	Vendor Note (Multiples allowed)

*YBP/GOBI subaccount is automatically assigned to this API field, so no customization is required.

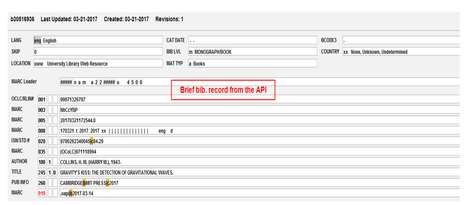
Sierra settings (Acquisitions API documentation in Supportal)

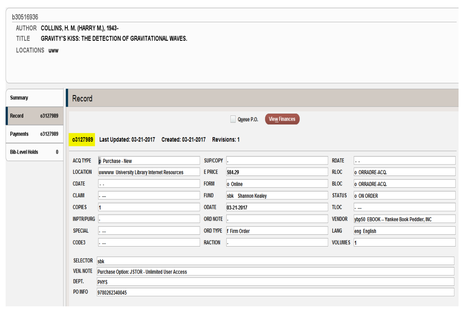
—Send the API Key to GOBI

—Use load profile m2btab.oapi (with Sierra 2.3 and up)

```
## order record variable-length fields ##  [fixed fields not included here]
/^020||a|0|0|o|b|0|n|N|1|PO info
/^961||Ma|0|0|o|i|0|n|N|1|identity
/^961||b|0|0|o|x|0|n|N|1|for curr
/^961||Mc|0|0|o|n|0|n|N|1|note
/^961||Md|0|0|o|z|0|n|N|1|int note
/^961||Mf|0|0|o|s|0|n|N|1|selector
/^961||Mg|0|0|o|q|0|n|N|1|ven addr
/^961||Mh|0|0|o|v|0|n|N|1|ven note
/^961||Mi|0|0|o|f|0|n|N|1|ven id
# /^961||Mk|0|0|o|g|0|n|N|1|ship to
/^961||Ml|0|0|o|r|0|n|N|1|requestor
# /^961||Mm|0|0|o|p|0|n|N|1|blanket po
/^961||Mq|0|0|o|d|0|n|N|1|custom field 1/dept
/^961||Mt|0|0|o|z|0|n|N|1|custom field 2/int note
```

E-book Example



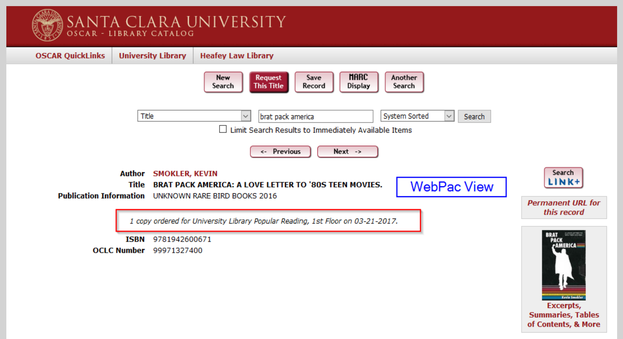


Log

"POST /iii/sierra-api/v3/acquisitions/orders/classic?login=sscardina&location=uppst&fund=pop&vendor=ybp08&copies=1&price=16.95&format=b&orderType=f&vendorIdNumber=99971327400&odate=03-21-17&language=eng&selector=ram&currencyCode=USD&vendorAccount=567408&requestor=Shara%20Scardina&customVarField1=GEN&customVarField2=Please%20place%20hold%20for%20Wen-ying%20Lu HTTP/1.1" 200 275 "-" "-" "-" "-" – 891131

marc2inn log [partial]:

```
2017-03-21 14:43:42,961 DEBUG Marc2INNSocketImpl [Req ID:0bec788a-ca06-456c-9fa4-d01f55a16e95] ======
START MARC Record ===============
2017-03-21 14:43:42,962 DEBUG Marc2INNSocketImpl [Req ID:0bec788a-ca06-456c-9fa4-d01f55a16e95] LEADER
00000nam a2200000u  4500
001 99971327400
003 NhCcYBP
005 20170321174304.0
008 170321t20162016xx |||||||||||||||   eng d
020   $a9781942600671$c16.95
035   $a(OCoLC)939427410
100 1 $aSMOKLER, KEVIN
245 10$aBRAT PACK AMERICA: A LOVE LETTER TO '80S TEEN MOVIES.
260   $aUNKNOWN$bRARE BIRD BOOKS$c2016
949   $a*recs=oapi;ins=sscardina;ep=1695;vd=ybp08;fm=b;ot=f;od=03-21-2017;ln=eng;ff=USD;
960   $zUSD$o1$tuppst$upop
961   $fram$m567408$lShara Scardina$qGEN$tPlease place hold for Wen-ying Lu
```



Duplicates Alert in GOBI

Order is marked as "Exception" when the library already owns another copy or a different edition/format.

Limitations

- Brief bib. records only, no full records.
- This API does not work with the invoicing process.

Trouble Shooting

- ✓ Check firewall
- ✓ Re-send the API key to GOBI
- ✓ Check legacy codes in loader m2btab.b
- ✓ Check field mapping with GOBI and m2btab.oapi
- ✓ Check log file on the app server
- ✓ Check m2btab.oapi for unexpected changes
- ✓ Check default currency setting (Sierra 2.4)
- ✓ Change fund codes to lower case in GOBI and in GOBI templates before upgrade (Sierra 3.0)
- ✓ Check known bug (Sierra 3.1 fix for dupes)
- ✓ Test with every Sierra upgrade

Enhancement Wishes

1. Allow holds to be automatically generated via the API when holds are indicated in a specific field.
2. Enable the API for the invoicing process.

Acknowledgements

Many thanks to SCU staff Shara Scardina, David Jones and Billie Knepper for their assistance during the beta testing, implementation and trouble shooting of the API and in the preparation for this poster.

Big thanks to Milton Howard, Harriet Welsh and Jodi Williamschen of Innovative Interfaces, Inc. and Ann-Marie Breaux of GOBI, formerly YBP, for making the Acquisitions API come alive.

And special thanks to Melodie Frances of Diablo Valley College and Dao Rong Gong of Michigan State University for sharing their experiences with the Acquisitions API.

Contact: Wen-ying Lu -- wlu@scu.edu