



13 May 2021

Migrating Open Orders With WorldShare APIs



Larry Deck

Systems Librarian, Concordia University
Library

Migrating Open Orders With WorldShare APIs

Larry Deck

Concordia University

Today's topic

How Concordia migrated open orders from Sierra to WorldShare using every route of the WMS Acquisitions API and some routes of the WMS Vendor Information Center API, as well as assorted other things.

About Concordia

- One of two English-speaking universities in Montreal
- About 36,000 undergraduates and 10,000 graduate students enrolled in courses
- About 1,000 full-time faculty and librarians and another thousand part-time and continuing education instructors
- Member of a provincial consortium, the *Bureau de coopération interuniversitaire* (BCI) with 18 member institutions across Québec

Migrating to WorldShare Management Services

- All the members of the BCI consortium migrated to WMS and went live as a consortium in summer of 2020
- Concordia migrated from Innovative's Sierra ILS
 - Bibliographic records migrated with some local data in LBDs
 - Items migrated with new holding-level records created from location information
 - Patrons and loans migrated along with item statistics but not holds

Deciding to migrate acquisitions data

- Reasons *not* to migrate acquisitions data

- No ready-made migration services provided by OCLC
- Opportunity to train staff by copying orders over
- Lack of standardization for acquisitions data means lots of mapping

Farrell, Katharine & Truitt, Marc. (2003). The case for acquisitions standards in the integrated library system. *Library Collections, Acquisitions, and Technical Services*. 27. 483-492. 10.1016/j.lcats.2003.09.012.

- Reasons to migrate what you can

- Quality control
- Staffing restrictions
- Gaining experience using APIs

What to migrate, if anything?

- *Vendor records* are shared resources in WMS — most vendors already had records
- *Budgets* had to be created through the WMS Acquisitions interface
- *Invoices* were not migrated but some payment information was retained
- *ERM records* were not migrated but were exported to spreadsheets
- *Check-in schedules and claims* were not migrated but were exported to spreadsheets
- We decided to try to migrate the ***open orders*** for ***serials*** (~ 1,370) and ***monographs*** (~ 900)

So you've decided to migrate open orders...

- Can it even be done?
 - Yes!
 - WMS Acquisitions API has full *CRUD* functionality for Purchase Orders and Purchase Order Items
- Do we have the necessary data?
(What are the *minimum* requirements for creating a PO/PO item in WMS?)
- Is there room for everything we would like to hold onto?

Basic structural difference between Sierra and WMS

Sierra

- 1 order → 1 resource (bib record)
- 1 order → 1 or more copies

WMS

- 1 order → 1 or more order *items*
(an order serves to group items from the same vendor and destined for the same receiving address)
- 1 order item → 1 resource [bib | KB | local]
- 1 order item → 1 or more copies

Browse . RECORD NUMBER o105240a Search + Local

New Insert Save View Edit PPro Summary Export Vendor Print Close Fund

b1438498x

TITLE Perspectives of new music.

Call Number ML 1 P109

LOCATIONS w , v

Library has Webster Journals: v.53 (2014/2015)-

Library has Vanier Journals: v.38 (2000)-v.39 (2001), v.41 (2003)-v.52 (2014)

Library has Webster Media Collection: v.26 no.2 suppl. (1988)-



Summary

Record o1052408

Receive o1052408

Selection List o1052408

Payments o1052408

Bib-Level Holds 0

Record

 Queue P.O. [View Finances](#)

o1052408 Last Updated: 12-12-2019 Created: 21-09-1993 Revisions: 84

| | | | | | |
|----------|-----------------------|----------|---------------------|---------|-------------------------|
| ACQ TYPE | p PURCHASE | E PRICE | \$0.00 | RLOC | a ACQ.-SER. |
| LOCATION | wepw Webster Journals | FORM | p PERIODICAL | BLOC | a ACQ.-SER. |
| CDATE | - - | FUND | c399p Fine Arts-Per | STATUS | f SERIAL NO ENC |
| CLAIM | - | ODATE | 23-03-1972 | TLOC | - |
| COPIES | 1 | ORD NOTE | - | VENDOR | ebsco Ebsco Canada Ltee |
| CODE1 | | ORD TYPE | s SUBSCRIPTION | LANG | eng English |
| CODE2 | | RACTION | - | COUNTRY | |
| CODE3 | n SUPPRESS | RDATE | - - | VOLUMES | 1 |
| CODE4 | y PST | | | | |

Queue P.O.[View Finances](#)

o1052408 Last Updated: 12-12-2019 Created: 21-09-1993 Revisions: 84

| | |
|-------------------------|--|
| VENDOR TITLE ID# | 686666009 |
| OLD PO# | LO99413 |
| INT. NOTE | Okayed Ebsco 2020 renewal noticed dated 01.06.2019 for 2020. 29.07.2019 dl |
| INT. NOTE | PER 601 79005 MAIN |
| INT. NOTE | Ebsco 2017 renewal noticed dated 01.06.2016 for 2016 reads: EBSCO WILL ORDER WHEN CURRENT 20.07.2016 dl |
| INT. NOTE | LOCATION changed to wepr, Sept. 13, 2012 |
| INT. NOTE | rloc changed to p, Sept. 12, 2012 |
| INT. NOTE | ATTENTION - 2012/13 RENEWAL: Current issues (5 latest years) at Webster as of June 2012. Change all records accordingly! |
| INT. NOTE | Keep print. Do not change to online-only - Jared per mf 22ap09 |
| INT. NOTE | Price includes INDEX |
| INT. NOTE | Starting with 2004 our new agent will be EBSCO_pc |
| INT. NOTE | SLOW PUBLICATION |

Record

 Queue P.O.[View Finances](#)

o1052408 Last Updated: 12-12-2019 Created: 21-09-1993 Revisions: 84

| PAID | DATE | INVD | INV# | AMT | VOUCHER | COPIES | FOR CURR | NOTE |
|------|------------|------------|---------|----------|---------|--------|----------|------------------------------|
| | 12-12-2019 | 20-11-2019 | 8039031 | \$250.70 | 42141 | 001 | | 57(01/19)-57(12/19)!C0831389 |
| PAID | 29-11-2018 | 14-11-2018 | 8033994 | \$251.44 | 40230 | 001 | | 56(01/18)-56(12/18)!C0831389 |
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| PAID | 08-03-2013 | 04-01-2013 | 9157740 | \$186.30 | 26830 | 001 | | 50(01/12)-50(12/12)!C0831389 |
| PAID | 05-03-2012 | 13-02-2012 | 0033096 | \$20.23 | 23116 | 001 | | Postage adj. v.49 |
| PAID | 02-03-2012 | 14-12-2011 | 9151753 | \$158.90 | 23089 | 001 | | 49(01/11)-49(12/11)!C0831389 |
| PAID | 12-01-2010 | 25-11-2009 | 9139945 | \$182.60 | 16251 | 001 | | 48(01/10)-48(12/10)!C0831389 |
| PAID | 27-01-2009 | 26-11-2008 | 9132850 | \$212.92 | 12543 | 001 | | 47(01/09)-47(12/09)!C083 |
| PAID | 14-01-2008 | 16-11-2007 | 9125970 | \$154.12 | 8394 | 001 | | 46(01/08)-46(12/08)!C083 |

b1438498x

TITLE Perspectives of new music.

Call Number ML 1 P109

LOCATIONS w , v

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Summary

Record c1024747

Card c1024747

Holdings c1024747

Routing 0

Bib-Level Holds 0

Record

c1024747 Last Updated: 11-11-2019 Created: 06-04-1993 Revisions: 152

| | | | | | |
|------------|-----------------|----------|-------------------------|--------|---------------|
| LABEL TYPE | n NO LABEL | CLAIMON | 17-04-2020 | SCOPE3 | - --- |
| SCOPE1 | 0 NORMAL SERIAL | LOCATION | wepw Webster Journals | SCOPE4 | - --- |
| SCOPE2 | - CHECK | RLOC | a ACQ.-SER. | UPDCNT | b SEMI-ANNUAL |
| COPIES | 1 | VENDOR | ebSCO Ebsco Canada Ltee | PCOUNT | 29 |

MARC Leader ##### n y 2 2 ##### 3 n 4 5 0 0

Call Number Per ML 1 P109 WEB ART

NOTE DO NOT BIND - JSTOR weeding project Winter 2010

INT. NOTE Published 2x per year with occasional extra issue.

INT. NOTE

Minimum requirements for making a PO in WMS

(With thanks to Ed Hill, aka *pybrarian*, author of the `oclc_wrappers` library on Github — https://github.com/pybrarian/oclc_wrappers)

1. `orderName`
2. `vendor.vendorID`

This will work (sent as Content-Type: application/json, http POST):

```
{
  "orderName": "Amazon TESTING PO",
  "vendor": {
    "vendorId": "2d974e7f-e655-4ad6-be1e-f56422e66abf"
  }
}
```

Response for minimal PO with status *201 Created*

```
{
  "externalOrderId": null,
  "orderName": "Amazon TESTING PO",
  "link": {
    "href": "https://acq.sd04.worldcat.org/purchaseorders/PO-2021-6/?inst=263686"
  },
  "purchaseOrderNumber": "PO-2021-6",
  "orderNumberRange": null,
  "comment": null,
  "vendor": {
    "vendorId": "2d974e7f-e655-4ad6-be1e-f56422e66abf",
    "vendorName": "Amazon Canada",
    "localIdentifier": null
  },
  "vendorOrderNumber": null,
  "customerNumber": null,
  "currency": "CAD",
  "exchangeRate": 1,
  "orderDate": null,
  "orderItemCount": 0,
  "vendorMessage": null,
  "taxCalculationMethod": "EXCLUDE_ADDITIONAL_COSTS",
  "purchaseOrderState": "OPEN",
  "totalOrderPrice": 0.00,
  "lastUpdateTime": 1620065593604,
  "insertTime": 1620065593604,
  "shippingType": "STD",
  "shippingAddressId": "MAIN"
  [ ETC... ]
}
```


Minimum requirements for making a PO item in WMS

resource.worldcatResource.oclcNumber

This will work:

```
{  
  "resource": {  
    "worldcatResource": {  
      "oclcNumber": 1047814370  
    }  
  }  
}
```

Browse . RECORD NUMBER o105240a Search + Local

New Insert Save View Edit PPro Summary Export Vendor Print Close Fund

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| CLAIM | - | ODATE | 23-03-1972 | TLOC | - |
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| CODE3 | n SUPPRESS | RDATE | - - | VOLUMES | 1 |
| CODE4 | y PST | | | | |

| | | | | | |
|------------|--------|-------------|----------|-------------|--------|
| CLAIMCYCLE | | RECEIPTS | 1 | EPRICE CNCL | \$0.00 |
| VCODE1 | - NONE | INVOICES | 314 | AVG WEEKS | 43 |
| VCODE2 | - NONE | ORD CLMD | 0 | DISCOUNT | 0 |
| VCODE3 | - NONE | CPY RCVD | 1 | VENDOR MSG | |
| ORDERS | 0 | ORD TOT | \$0.00 | LANGUAGE | |
| CLAIMS | 0 | INV TOT | \$576.32 | GIR CODE | 0 |
| CANCELS | 42 | EPRICE RCVD | \$103.82 | | |


| | |
|-----------|------------------------------------|
| VENCODE | ebsco |
| VENNAME | Ebsco Canada Ltee |
| ADDRESS1 | Ebsco Canada Ltee |
| | 4148A Sainte-Catherine Street West |
| | Suite128 |
| | Westmount, QC H3Z 0A2 |
| | |
| PHONE NUM | 1-800-387-5241 x 2308 |
| FAX | 1-800-390-6878 |

Minimal PO based on Sierra order record









```
{  
  "orderName": "Perspectives of new music",  
  "vendor": {  
    "vendorId": "???"  
  }  
}
```


Vendor Search: Keyword with ebSCO

All ▾

Results 1 - 8 of 8 

Rows ▾    

| Private/Public | Vendor Name | Location | In Use |
|--|--|---|-------------------------------------|
|  Public | EBSCO | Birmingham, AL, US | <input type="checkbox"/> |
|  Public | EBSCO Australia Subscription Services | North Sydney, N.S.W., AU | <input type="checkbox"/> |
|  Public | EBSCO Canada (devise US) | Toronto, Ontario, CA | <input type="checkbox"/> |
|  Public | EBSCO Canada Ltée | Toronto, CA | <input checked="" type="checkbox"/> |
|  Public | EBSCO Italy | IT | <input type="checkbox"/> |
|  Public | EBSCO Netherlands | Aalsmeer, NL | <input type="checkbox"/> |
|  Public | EBSCO NZ | Newmarket, Auckland, NZ | <input type="checkbox"/> |
|  Public | GOBI Library Solutions from EBSCO (YBP US) | Contoocook, New Hampshire/Merrimack, US | <input checked="" type="checkbox"/> |

Results 1 - 8 of 8 

Rows ▾    



- [-] Acquisitions Vendor [unx]
 - [+] Measure
 - [+] Institution
 - [-] General
 - Vendor Name
 - Vendor Country
 - Vendor Roles
 - Vendor Language
 - Vendor In Use Indicator
 - Vendor Public Indicator
 - [+] Vendor Addresses
 - [+] Contacts
 - [-] Identifiers
 - Vendor Alternate Name
 - Vendor FEIN
 - Vendor ID**
 - Vendor ISBN Prefix
 - Vendor Identifier Tax Number
 - Vendor Identifier URL
 - Vendor OCLC Symbol
 - Vendor Previous Name
 - Vendor SAN
 - [+] Local Identifiers
 - [+] Customer Account Numbers
 - [+] Acquisitions Settings
 - [+] Notes

<https://vic.sd04.worldcat.org/vendors?q=ebsco&status=active>

```
{
  "vendorId": "0c0c5b0e-781b-49a3-b7c0-293512cdd9ac",
  "link": {
    "href": "https://vic.sd04.worldcat.org/vendors/0c0c5b0e-781b-49a3-b7c0-293512cdd9ac?inst=42886"
  },
  "name": "EBSCO Canada Ltée",
  "vendorNumber": "",
  "country": "CA",
  "place": "Toronto",
  "location": [
    "Toronto, CA"
  ],
  "isActive": true,
  "isShared": true
}
```

Mapping Sierra vendor codes to WMS vendorids

| Sierra | WMS |
|--------|--------------------------------------|
| ----- | --- |
| ... | |
| ut | acfbbf3f-460d-49b3-b9a4-efa7a5580ed1 |
| utp | 5d16c83a-2384-4f9a-b685-510899400390 |
| vall | ce1299a1-3496-4ac2-906b-aeb45e9390b8 |
| vid2 | 0da33e8d-bfb4-4e78-9384-d7b7314df0d5 |
| vlp | 039bda76-e344-4aca-abfb-a72be7f50b5c |
| vrs | 1d24bea4-1c0c-4a04-9c8d-6f64a08c81f8 |
| vtd | 0bece688-ebde-42bf-a7bf-7db32fdff04f |
| vtna | f738e2d1-6bbb-49db-98f5-6aa2900850d7 |
| wil | a67a8eae-60df-4ee9-ab11-bf21c092cb27 |
| wil2 | 523d357e-0417-48a5-a364-bb9a7882cd55 |
| wils | 32aa8767-9b55-4ed7-9332-9c14b2f0ee81 |
| wr | 19a99ed3-9707-4b67-ae53-f131fbb19dcf |
| ybp | 36842db6-97a0-42c8-b46d-d0ca77c5db57 |
| ybpuk | 36842db6-97a0-42c8-b46d-d0ca77c5db57 |

| | | | | | | |
|-------------------|-----|---|---|--|---|---------|
| MARC | 008 | | | 751101 c 1962 9999 wau f r p | 0 | a 0 eng |
| LC CARD # | 010 | | | 66089176 | | |
| MARC | 014 | | | OCLCxref b20140317 c20140710 | | |
| MARC | 014 | | | WMSExport | | |
| MARC | 014 | | | WMSDelta | | |
| MARC | 016 | 7 | | 007192953 2Uk | | |
| ISBN/ISSN | 022 | 0 | | 0031-6016 0031-6016 21 | | |
| Control number | 035 | | | (OCoLC)1762140 | | |
| ISBN/ISSN | 037 | | | bPerspectives of New Music, University of Washington, MUSI | | |
| MARC | 040 | | | DLC beng cMUL dOCL dCOO dDLC dNSD dDLC dAIP dNSD d | | |
| | | | | dCUS dCDS dGUA dZYU dOCLCQ dLVB dWAU dSINLB dOC | | |
| MARC | 042 | | | tev | | |
| MARC | 042 | | | pcc ansdp | | |
| MARC | 050 | 0 | 0 | ML1 b.P109 | | |
| MARC | 082 | 0 | 4 | 780.5 221 | | |
| Call Number | 090 | | | ML 1 P109 | | |
| Alternative Title | 210 | 0 | | Perspect. new music. | | |
| Alternative Title | 222 | | 0 | Perspectives of new music. | | |
| TITLE | 245 | 0 | 0 | Perspectives of new music. | | |

| | | | | | |
|-------------------|-----|---|---|--|-----------|
| MARC | 008 | | | 751101 c 1962 9999 wau f r p | 0 a 0 eng |
| LC CARD # | 010 | | | 66089176 | |
| MARC | 014 | | | OCLCxref b20140317 c20140710 | |
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| ISBN/ISSN | 037 | | | bPerspectives of New Music, University of Washington, MUSI | |
| MARC | 040 | | | DLC beng cMUL dOCL dCOO dDLC dNSD dDLC dAIP dNSD d | |
| | | | | dCUS dCDS dGUA dZYU dOCLCQ dLVB dWAU dSINLB dOC | |
| MARC | 042 | | | tev | |
| MARC | 042 | | | pcc ansdp | |
| MARC | 050 | 0 | 0 | ML1 b.P109 | |
| MARC | 082 | 0 | 4 | 780.5 221 | |
| Call Number | 090 | | | ML 1 P109 | |
| Alternative Title | 210 | 0 | | Perspect. new music. | |
| Alternative Title | 222 | | 0 | Perspectives of new music. | |
| TITLE | 245 | 0 | 0 | Perspectives of new music. | |

A minimal PO & PO item for *Perspectives of new music*

PO:

```
{  
  "orderName": "Perspectives of new music",  
  "vendor": {  
    "vendorId": "0c0c5b0e-781b-49a3-b7c0-293512cdd9ac"  
  }  
}
```

PO item:

```
{  
  "resource": {  
    "worldcatResource": {  
      "oclcNumber": 1762140  
    }  
  }  
}
```

Additional data to migrate

- Budget and pricing
- Shelving location
- Vendor order number and order item number
- Locally significant data including
 - Sierra order number (for verification, etc.)
 - call numbers for display copies
 - purchase order numbers for the campus financial system (Banner, but soon to be SAP)
 - tax codes (Canadian federal value-added tax and Quebec provincial sales tax in various combinations) and “QST applicable”
 - notes for binding
 - old PO number
 - department or faculty

Mapping budgets

- Concordia took advantage of the move to WMS to revamp the budget structure, mostly to ease reporting
 - Budgets were set up in advance by senior Collections staff (Pat Riva, Meredith Giffen, Christine Smith)
- As a result, mapping the budgets was the single most complex mapping problem
 - The WMS fund was a complex function of the Sierra fund, vendor, acquisitions type, and order type — thank you, Meredith Giffen!

| Sierra Order Status Code | Sierra Fund Code | Sierra Fund Name | Sierra Vendor | Sierra Acq Type Code | Sierra Order Material Type Code | WMS Fund Name | WMS Fund Code | WMS Order Type | WMS Order Name | WMS Order Item Acquisition Type | WMS Order Item Processing Type | Notes |
|--------------------------|------------------|------------------|--------------------|----------------------|---------------------------------|---------------|-----------------------|----------------|------------------------|---------------------------------|--------------------------------|-----------------------------------|
| f | c***p | various | NOT crepu NOT crkn | p | i | C01-03-00 | C-Other Subscriptions | Purchase Order | Create order for title | Subscription | Local | I.N.D. Aggregator orders for prin |
| f | c***p | various | NOT crepu NOT crkn | p | r | C01-03-00 | C-Other Subscriptions | Purchase Order | Create order for title | Subscription | Electronic Product | |
| f | c***p | various | NOT crepu NOT crkn | p | b or m or p | C01-03-00 | C-Other Subscriptions | Purchase Order | Create order for title | Subscription | Serial | |
| f | c***p | various | NOT crepu NOT crkn | z | p | C01-03-00 | C-Other Subscriptions | Purchase Order | Create order for title | Subscription | Serial | Free print needing checkins |
| f | c***p | various | NOT crepu NOT crkn | l | r | N01-03-00 | N-Other Subscriptions | Purchase Order | Create order for title | Subscription | Electronic Product | |

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| CODE1 | | ORD TYPE | s SUBSCRIPTION | LANG | eng English |
| CODE2 | | RACTION | - | COUNTRY | |
| CODE3 | n SUPPRESS | RDATE | - - | VOLUMES | 1 |
| CODE4 | y PST | | | | |

Adding pricing information

- Rather than migrate an encumbered or estimated price, we decided to migrate the last price paid
- We did not attempt to migrate any tax or shipping charges

Record

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| PAID | 08-03-2013 | 04-01-2013 | 9157740 | \$186.30 | 26830 | 001 | | 50(01/12)-50(12/12)!C0831389 |
| PAID | 05-03-2012 | 13-02-2012 | 0033096 | \$20.23 | 23116 | 001 | | Postage adj. v.49 |
| PAID | 02-03-2012 | 14-12-2011 | 9151753 | \$158.90 | 23089 | 001 | | 49(01/11)-49(12/11)!C0831389 |
| PAID | 12-01-2010 | 25-11-2009 | 9139945 | \$182.60 | 16251 | 001 | | 48(01/10)-48(12/10)!C0831389 |
| PAID | 27-01-2009 | 26-11-2008 | 9132850 | \$212.92 | 12543 | 001 | | 47(01/09)-47(12/09)!C083 |
| PAID | 14-01-2008 | 16-11-2007 | 9125970 | \$154.12 | 8394 | 001 | | 46(01/08)-46(12/08)!C083 |

Creating budget and payment data

```
...  
"bookings": [  
  {  
    "budgetPeriodNumber": "BP-2020-1",  
    "budgetAccountCode": "C-Other Subscriptions",  
    "budgetAccountName": "C01-03-00",  
    "percentage": 100.00,  
    "amount": null,  
    "targetAmountStdCurrency": 250.70  
  }  
]  
...
```

Perspectives of new music.

Save

Create Template

General

Order

Location

Pricing

Budget/Fund

Invoice

Renewals

Copies

Custom Fields (7)

Notes (7)

Budget/Fund

Disencumbrance Method --

Encumbrance 250.70 CAD

Clear Encumbrance

- Note**
- Clear encumbrance will mark copies as paid.
 - Purchase status is updated to paid after all invoices have been paid.

Amount 250.70 CAD (250.70 CAD)

Percentage Unassigned 0.00 [Distribute evenly among unallocated funds](#)

Allocate by Amount Percentage

| Budget | Fund | Amount (CAD) | Percentage | Actions |
|--------------------|-----------|---------------|---------------|---------|
| 2020-2021 (1 Year) | C01-03-00 | 250.70 | 100.00 | |
| Totals | | 250.70 | 100.00 | |

Perspectives of new music.

Save

Create Template

General

Order

Location

Pricing

Budget/Fund

Invoice

Renewals

Copies

Custom Fields (7)

Notes (7)

Pricing

Tax Handling: Tax item cost

| | | | | | | | | |
|--------------------|-------------------------------------|---|-----------------------------------|--------------------------------|--------------------------------|-------------------------------------|-------------------------------------|---|
| Unit Price | <input type="text" value="250.70"/> | x | Quantity | <input type="text" value="1"/> | = | <input type="text" value="250.70"/> | | |
| % Discount | <input type="text" value="0.00"/> | | <input type="text" value="0.00"/> | x | <input type="text" value="1"/> | = | <input type="text" value="0.00"/> | - |
| % Service Charges | <input type="text" value="0.00"/> | | <input type="text" value="0.00"/> | x | <input type="text" value="1"/> | = | <input type="text" value="0.00"/> | + |
| % Shipping | <input type="text" value="0.00"/> | | <input type="text" value="0.00"/> | x | <input type="text" value="1"/> | = | <input type="text" value="0.00"/> | + |
| % Tax 1 | <input type="text" value="0.00"/> | | <input type="text" value="0.00"/> | x | <input type="text" value="1"/> | = | <input type="text" value="0.00"/> | + |
| % Tax 2 | <input type="text" value="0.00"/> | | <input type="text" value="0.00"/> | x | <input type="text" value="1"/> | = | <input type="text" value="0.00"/> | + |
| Total (CAD) | | | | | | | <input type="text" value="250.70"/> | |

Shelving locations

- The shelving locations had been set up as part of the original bibliographic migration
- The map from Sierra locations to locations in WMS was part of the implementation
- Branches map to *branch IDs* — available from WorldCat Registry website, WMS config, or the WorldCat Registry API
- Shelving locations map to shelving location *names*

Creating shelving information

```
...  
"branchId": 264731,  
"shelvingLocationId": "- Journals",  
...
```

Perspectives of new music.

Save

Create Template

General

Order

Location

Pricing

Budget/Fund

Invoice

Renewals

Copies

Custom Fields (7)

Notes (7)

Location

| Quantity | Branch | Location |
|--------------------------------|--|---|
| <input type="text" value="1"/> | <input type="text" value="Webster Library"/> | <input type="text" value="- Journals"/> |

Migrating data into *custom fields* in a PO item

Settings

- Institution Settings
- User Preferences
- Custom Fields
- Administration

Create Field ✕

* Required field

Field Name*

Entity*

Field Type*

Analytics Field ID*

Order Items

Order Type: All Processing Type: All Order

- Sierra Order Number
- KB Collection Identifier
- KB Collection Name
- KB Title Identifier
- Keyword
- Note
- OCLC Number
- Old PO Number
- Order Item Number
- Order Name
- Order Number
- Provider Name
- Publication Date
- Publisher
- Shelving Location(s)
- Sierra Order Number
- Tipasa ID
- Title
- Vendor Name
- Vendor Order Item Number
- Vendor Order Number

Textual custom fields

Perspectives of new music.

Save

Create Template

General

Order

Location

Pricing

Budget/Fund

Invoice

Renewals

Copies

Custom Fields (7)

Notes (7)

Custom Fields

Banner Object Code

79005 - Print Serials

Tax Code

MAIN

QST Applicable

Yes

Department or Fund ?

MUSIC

Sierra Order Number ?

o105240a

Old PO Number ?

LO99413

Binding Information

TITLE ID:500473 MAT:PN146

Perspectives of new music.

Save

Create Template

General

Order

Location

Pricing

Budget/Fund

Invoice

Renewals

Copies

Custom Fields (7)

Notes (7)

Custom Fields

Banner Object Code

79005 - Print Serials

Tax Code

MAIN

QST Applicable

Yes

Department or Fund ?

MUSIC

Sierra Order Number ?

For migrated order only, the order record number from Sierra

Old PO Number ?

LO99413

Binding Information

TITLE ID:500473 MAT:PN146

How textual custom fields look when you read a PO-item

```
    ...  
  {  
    "@type": ".TextField",  
    "value": "o105240a",  
    "label": "Sierra Order Number",  
    "description": "For migrated order only, the order record number from Sierra",  
    "fieldDefinitionNumber": "CF-ORDER_ITEM-5",  
    "type": null  
  },  
  {  
    "@type": ".TextField",  
    "value": "L099413",  
    "label": "Old PO Number",  
    "description": "For migrated orders only, the old (manual system) purchase order number",  
    "fieldDefinitionNumber": "CF-ORDER_ITEM-6",  
    "type": null  
  }  
  ...
```

Creating textual custom fields for PO items

```
...  
"customFields": [  
  {  
    "@type": ".TextField",  
    "value": "TEST",  
    "fieldDefinitionNumber": "CF-ORDER_ITEM-5"  
  },  
  ...  
],  
...
```

I determined experimentally that the maximum length for the textual custom fields is **190 characters**.

List custom fields

Perspectives of new music.

Save

Create Template

General

Order

Location

Pricing

Budget/Fund

Invoice

Renewals

Copies

Custom Fields (7)

Notes (7)

Custom Fields

Banner Object Code

79005 - Print Serials

Tax Code

QST Applicable

Department or Fund ?

Sierra Order Number ?

Old PO Number ?

Binding Information

- 79000 - Print Monographs
- 79001 - eBooks
- 79002 - Media Materials
- ✓ 79005 - Print Serials
- 79020 - Purchased Databases
- 74500 - Leased Electronic Resources
- 79050 - Binding
- 79025 - Digitization
- 73020 - Customs Brokers

TITLE ID:500473 MAT:PN146

How list custom fields look when you read a PO-item

```
"customFields": [  
  {  
    "@type": ".SelectField",  
    "value": {  
      "id": 3659174697245532,  
      "label": "79005 - Print Serials",  
      "active": true  
    },  
    "options": "https://acq.sd04.worldcat.org/acquisitions/customfield/CF-ORDER_ITEM-1/selectableoptions/",  
    "label": "Banner Object Code",  
    "description": null,  
    "fieldDefinitionNumber": "CF-ORDER_ITEM-1",  
    "type": null  
  },  
  ...  
]
```

Getting id values for list custom field elements

GET https://acq.sd04.worldcat.org/acquisitions/customfield/CF-ORDER_ITEM-1/selectableoptions/

```
{
  "entry": [
    {
      "id": 3659174697245529,
      "label": "79000 - Print Monographs",
      "active": true
    },
    {
      "id": 3659174697245530,
      "label": "79001 - eBooks",
      "active": true
    },
    {
      "id": 3659174697245531,
      "label": "79002 - Media Materials",
      "active": true
    },
    ...
  ]
}
```

Creating list custom fields

```
...  
"customFields": [  
  {  
    "@type": ".SelectField",  
    "value": {  
      "id": 3659174697245532,  
      "active": true  
    },  
    "fieldDefinitionNumber": "CF-ORDER_ITEM-1"  
  },  
  ...  
],  
...
```

Browse . RECORD NUMBER o105240a Search + Local

New Insert Save View Edit PPro Summary Export Vendor Print Close Fund

b1438498x

TITLE Perspectives of new music.

Call Number ML 1 P109

LOCATIONS w , v

Library has Webster Journals: v.53 (2014/2015)-

Library has Vanier Journals: v.38 (2000)-v.39 (2001), v.41 (2003)-v.52 (2014)

Library has Webster Media Collection: v.26 no.2 suppl. (1988)-



Summary

Record o1052408

Receive o1052408

Selection List o1052408

Payments o1052408

Bib-Level Holds 0

Record

 Queue P.O.[View Finances](#)

o1052408 Last Updated: 12-12-2019 Created: 21-09-1993 Revisions: 84

| | | | | | |
|----------|-----------------------|----------|---------------------|---------|-------------------------|
| ACQ TYPE | p PURCHASE | E PRICE | \$0.00 | RLOC | a ACQ.-SER. |
| LOCATION | wepw Webster Journals | FORM | p PERIODICAL | BLOC | a ACQ.-SER. |
| CDATE | - - | FUND | c399p Fine Arts-Per | STATUS | f SERIAL NO ENC |
| CLAIM | - | ODATE | 23-03-1972 | TLOC | - |
| COPIES | 1 | ORD NOTE | - | VENDOR | ebsco Ebsco Canada Ltee |
| CODE1 | | ORD TYPE | s SUBSCRIPTION | LANG | eng English |
| CODE2 | | RACTION | - | COUNTRY | |
| CODE3 | n SUPPRESS | RDATE | - - | VOLUMES | 1 |
| CODE4 | y PST | | | | |

Record

 Queue P.O.[View Finances](#)

o1052408 Last Updated: 12-12-2019 Created: 21-09-1993 Revisions: 84

| | |
|-------------------------|--|
| VENDOR TITLE ID# | 686666009 |
| OLD PO# | LO99413 |
| INT. NOTE | Okayed Ebsco 2020 renewal noticed dated 01.06.2019 for 2020. 29.07.2019 dl |
| INT. NOTE | PER 601 79005 MAIN |
| INT. NOTE | Ebsco 2017 renewal noticed dated 01.06.2016 for 2016 reads: EBSCO WILL ORDER WHEN CURRENT 20.07.2016 dl |
| INT. NOTE | LOCATION changed to wepr, Sept. 13, 2012 |
| INT. NOTE | rloc changed to p, Sept. 12, 2012 |
| INT. NOTE | ATTENTION - 2012/13 RENEWAL: Current issues (5 latest years) at Webster as of June 2012. Change all records accordingly! |
| INT. NOTE | Keep print. Do not change to online-only - Jared per mf 22ap09 |
| INT. NOTE | Price includes INDEX |
| INT. NOTE | Starting with 2004 our new agent will be EBSCO_pc |
| INT. NOTE | SLOW PUBLICATION |

| | |
|--------------------|---|
| MARC Leader | ##### n y 2 2 ##### 3 n 4 5 0 0 |
| Call Number | Per ML 1 P109 WEB ART |
| NOTE | DO NOT BIND - JSTOR weeding project Winter 2010 |
| INT. NOTE | Published 2x per year with occasional extra issue. |
| INT. NOTE | C-Disc need item record. |
| INT. NOTE | RLOC changed to "p", Sept. 14, 1012 |
| INT. NOTE | ATTENTION - 2012/13 RENEWAL: Current issues (5 latest years) at Webster as of June 2012. Change all records accordingly! |
| INT. NOTE | Slow Publication/Non-Print supplements at Webster Media |
| INT. NOTE | \$aL099413\$bFA\$f1988:25/1989:73/1990:71/1991:71/\$i616-058\$tVAPR\$w15\07\$zC439 |
| BIND INFO | TITLE ID:500473 MAT:PN146 |

Sierra data migrated to custom fields

| | | |
|---|---|---|
| Sierra order note, normalized | → | Banner Object Code [list field, CF-ORDER_ITEM-1, mapped] |
| Sierra order note, normalized | → | Tax Code [list field, CF-ORDER_ITEM-2, mapped] |
| Sierra order fixed field | → | QST Applicable [list field, CF-ORDER_ITEM-3, mapped] |
| Sierra order note, normalized | → | Department or Fund [list field, CF-ORDER_ITEM-4, mapped] |
| Sierra order number | → | Sierra Order Number [text field, CF-ORDER_ITEM-5] |
| Sierra order note, normalized | → | Old PO Number [text field, CF-ORDER_ITEM-6] |
| Sierra check-in record note, normalized | → | Binding Information [text field, CF-ORDER_ITEM-7] |

Serials info migrated

- WorldCat resource (OCN)
- Vendor
- Budget and pricing
- Shelving location
- Vendor order number and order item number
- Locally significant data including
 - Sierra order number (for verification, etc.)
 - call numbers for display copies
 - purchase order numbers for the campus financial system (Banner, but soon to be SAP)
 - tax codes (Canadian federal value-added tax and Quebec provincial sales tax in various combinations) and “QST applicable”
 - notes for binding
 - old PO number
 - department or faculty

Monograph Orders

| | | | | | |
|----------|----------------------|----------|----------------------|---------|--------------------------------|
| ACQ TYPE | p PURCHASE | E PRICE | \$105.57 | RLOC | a ACQ.-SER. |
| LOCATION | we Webster 4th Floor | FORM | b BOOK | BLOC | a ACQ.-SER. |
| CDATE | - - | FUND | c405m Economics-Mono | STATUS | o ON ORDER |
| CLAIM | - | ODATE | 09-01-2020 | TLOC | p PO REQUESTED |
| COPIES | 1 | ORD NOTE | - | VENDOR | co Coutts Information Services |
| CODE1 | s VENDOR SLIPS | ORD TYPE | f FIRM ORDER | LANG | eng English |
| CODE2 | - BRIEF BIB | REACTION | - | COUNTRY | |
| CODE3 | - | RDATE | - - | VOLUMES | 1 |
| CODE4 | - | | | | |

| | |
|------------------|---------------|
| VENDOR TITLE ID# | 53875473 |
| SELECTOR | A. Department |
| SELECTOR | R. Johal |

Monograph info migrated

- WorldCat resource (OCNs mostly found by screen-scraping...)
- Vendor
- Budget and pricing
- Shelving location
- *Vendor order item number*

o4872629 Last Updated: 06-03-2020 Created: 09-01-2020 Revisions: 6

| | | | | | |
|----------|----------------------|----------|----------------------|---------|--------------------------------|
| ACQ TYPE | p PURCHASE | E PRICE | \$105.57 | RLOC | a ACQ.-SER. |
| LOCATION | we Webster 4th Floor | FORM | b BOOK | BLOC | a ACQ.-SER. |
| CDATE | - - | FUND | c405m Economics-Mono | STATUS | o ON ORDER |
| CLAIM | - | ODATE | 09-01-2020 | TLOC | p PO REQUESTED |
| COPIES | 1 | ORD NOTE | - | VENDOR | co Coutts Information Services |
| CODE1 | s VENDOR SLIPS | ORD TYPE | f FIRM ORDER | LANG | eng English |
| CODE2 | - BRIEF BIB | RACTION | - | COUNTRY | |
| CODE3 | - | RDATE | - - | VOLUMES | 1 |
| CODE4 | - | | | | |

| | |
|------------------|---------------|
| VENDOR TITLE ID# | 53875473 |
| SELECTOR | A. Department |
| SELECTOR | R. Johal |

Updating roughly 870 monograph PO items

- Steps to update a PO item:
 - a. Identify the PO item by PO item number
 - b. Identify the part of the record to update
 - c. Read (http GET) the PO item record with the header ETag
 - d. Modify the PO item record using pyjq library
 - e. Update (http PUT) the PO item record with the header ETag (If-Match), recording responses


```
from authliboclc import wskey, user
import requests
import re
import sys
import json
import pyjq

# WMS authentication
# function getPoltem(itemnumber) for retrieving PO item by PO item number
# function updatePoltem(itemnumber, etag, payload) for updating PO with ETag and payload

for line in sys.stdin:

    fields = line.strip().split("\t")
    ordeno = fields[0]
    itemnumber = fields[1]
    vendororderitemnumber = fields[2]

    poitem = getPoltem(itemnumber)

    theetag = re.sub(' .*$', "", poitem.headers['ETag'])

    thejson = json.loads(poitem.text)

    sierraonumber = pyjq.first('.content.customFields[] | select(.fieldDefinitionNumber=="CF-ORDER_ITEM-5") | .value', thejson)

    currentvendornumber = pyjq.first('.content.vendorOrderItemNumber', thejson)

    # test for right ordeno

    themod = pyjq.first('.content.vendorOrderItemNumber = "" + vendororderitemnumber + ""', thejson)

    payload = json.dumps(themod)

    try:
        updated = updatepoitem(itemnumber, theetag, payload)
        # do something with updated, e.g. print PO item number & status
    except Exception as e:
        print(str(e))
```

So with an input file proquest-fix.txt...

| | | |
|----------|----------------|----------|
| o470216a | PO-2020-1364-2 | 21154452 |
| o470635a | PO-2020-1364-3 | 21209533 |
| o472388a | PO-2020-1364-4 | 21344256 |
| o475279a | PO-2020-1364-7 | 21768835 |
| o475979a | PO-2020-1364-8 | 21901288 |
| o477094a | PO-2020-1364-9 | 22101524 |

...

```
>python batch-update.py < proquest-fix.txt
```

Deleting roughly 870 duplicate PO items

- Steps to batch-delete PO items
 - *Carefully* identify PO items to delete
 - Delete (http DELETE) PO items, recording responses

An observation

This kind of migration is really only possible with APIs.

Writing directly into a database with SQL, while technically possible, risks violating business rules.

Thanks for their invaluable help on this project

- To my colleagues in Concordia's Collection Services
 - Christopher Carr, *Cataloguing and Collection Maintenance Librarian*
 - Karen Jensen, *Head, Cataloguing and Collection Maintenance*
 - Meredith Giffen, *Collections Coordinator*
 - Christine Smith, *Head of Acquisitions & Serials*
 - Line Brisebois, *Supervisor, Acquisitions & Serials*
 - Pat Riva, *Associate University Librarian, Collection Services*
- To my fellow Systems Librarian, Kathleen Botter
- To Ed Hill, the pybrarian
- To the staff in OCLC Customer Support and the Developer Network
 - Maverik Cox, Jonathan Halper, Victoria Perkins, Karen Coombs