

Automated Ordering Process (LTS Procedure #106)

Scope: *This procedure explains the process of the pickup and scripted processing of order files from various vendors and our own POOF! system. It includes the methodology of automated vendor selection and the loading of bibliographic records and creation of purchase orders through the Lehigh App and FOLIO's data import function.*

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Automated orders are processed through a variety of sources: POOF!, Coutts Oasis Ally, Harrassowitz, Casalini, and others. We attempt to make the processing steps from each source as similar as possible, creating variations only when necessary and customization only when practical. The premise is to be able to add new vendors with a minimum of script adjustments.

1. **Pick up file from source:**
 - a. A POOF file is picked up from a cron job scheduled to run at 7:45 each weekday morning.
 - b. A cron job to pick up and process Coutts Oasis orders runs at 6:00 each weekday morning
 - c. Harrassowitz generates a file each day. Delivers file via FTP. Ordering staff retrieve the file.
 - d. Casalini generates a file as titles are selected. Ordering staff retrieve the file.
2. **Processing of files:**
 - a. Both POOF and Coutts Ally orders are processed through a set of rules commonly called the order matrix. Each line depends on a separate rule and the first time a record matches the criteria of the rule, instructions are in place to handle the record appropriately. All files are created in an S3 bucket that acquisitions and automation staff have access to.
 - b. After initial special exceptions are handled, the country code in the 008 field is examined, and a vendor assigned accordingly.
 - c. Titles for which no vendor is easily automatically assigned according to country code, will be placed in a separate file. Depending on which rule applies, the titles will be sorted as and rules applied based on whether they are electronic records, serials, early imprint dates, requesters, etc.
 - d. MARC records with data errors are placed in a separate file for manual processing.
 - e. In most cases for which a vendor creates a MARC file of ordered titles, MARC records are loaded with the Lehigh app to create bib records and purchase orders.
3. **The data import profile will discard bib records that match too closely to existing records.** POs will be created but if the record attempts to attach itself to a previously existing inventory instance, the process to overlay the record and create items and holdings will be stopped. This is to prevent destructive overlay of existing records. These records need to be looked at by the person loading the record. If a new bib needs to be created (ie, a print one instead of an electronic), the PO will have to be relinked to the newly created record. These situations are generally caused by duplicated ISBNs.

Next steps: Follow [LTS procedure number #117 for firm order final processing](#).