

# Evergreen Acquisitions

Next Generation Academic Library System  
Symposium

March 12, 2008

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Why am I here?

# Project Conifer

- July 2007 meeting of the minds:
  - Laurentian University - (small and bilingual)
  - McMaster University - (big research library)
  - University of Windsor - (just right)
- Common ground:
  - Our systems are on life support
  - We want something open, tailorable, shared
- Resources:
  - Hardware + 1.5 FTE (on paper, at least)

# What we (academics) need

- Roughly, in alphabetical order:
  - Academic reserves
  - Acquisitions
  - Multilingual support
  - Serials
  - Z39.50 server

# Acquisitions

# A long, hard road...

- September 2006:
  - Target for basic functionality was summer 2007
- July 2007:
  - AcqFest I: target moved to end of 2007
- December 2007:
  - At the end of AcqFest II, we shifted gears radically, with a new target of end of April
  - That target is looking pretty good

# Targeting two major models

- Manual entry
  - Items are entered by hand in Evergreen acquisitions
- Batch record loading
  - Select and order via provider interfaces
  - Generate a set of MARC order records
  - Load records into the system, automatically generating purchase orders and line items

# AA: (acq architecture)

- Business logic via OpenSRF services
- User interface via Pylons Web application framework
- Rapid iteration development method



# Authorization

Trying to create a new fund:

Insufficient Permissions

# Fund accounting

Auto-login is enabled | berick / BR1-demo

- [Dashboard](#)
- [Acquisitions](#)
- [Home](#)
- [Picklists](#)
- [Funds](#)
- [Funds](#)
- [Funding](#)
- [Sources](#)
- [Providers](#)
- [POs](#)
- [Admin](#)

## Childrens Books

[Allocate Money](#)

<b>Owner</b>	Example System 2
<b>Currency</b>	USD
<b>Year</b>	0
<b>Amount Allocated to this Fund</b>	150.00
<b>Balance (Total - (Spent + Encumberances))</b>	150.00
<b>Spent Balance (Total - Spent)</b>	150.00
<b>Total Debits (Spent + Encumbered)</b>	0
<b>Total Spent</b>	0
<b>Total Encumbered</b>	0

## Fund Allocations

Funding Source	Amount/Percent
Proceeds from bakesale	150.00

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# Selection lists

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[Dashboard](#)

[Acquisitions](#)

[Home](#)

[Picklists](#)

[Manage](#)

[Title](#)

[Search](#)

[Funds](#)

[POs](#)

[Admin](#)

## Picklist **Comedy Films**

Create date: 2008-03-05

Last updated: 2008-03-05





Owner: berick

Entries 1 - 5 of 5

Move Selected to Picklist...

-- Select A Picklist --

Submit

Item Description	# of Copies
 <a href="#">Laurel and Hardy comedy classics, vol.1</a> <a href="#">Metro-Goldwyn-Mayer : produced by Hal Roach.</a> Nostalgia Merchant, [198-], c1933. 1 videocassette (84 min.) : \$19.95	3 <input type="button" value="Update"/>
 <a href="#">Vernon God Little : a 21st century comedy in the presence of death / D.B.C. Pierre.</a> Faber and Faber, 2003. 279 p. ; 0571216420 : \$18.00	3 <input type="button" value="Update"/>
 <a href="#">Comedy improvisation : exercises &amp; techniques for young actors / by Delton T. Horn.</a> Meriwether Pub. Ltd., c1991. 134 p. : 0916260690 : \$15.00	7 <input type="button" value="Update"/>
 <a href="#">The ultimate improv book : a complete guide to comedy improvisation / Edward J. Nevraumont, Nicholas P. Hanson, with additional material from Kurt Smeaton.</a> Meriwether Pub., c2001. iv, 272 p. ; 1566080754 17.00	2 <input type="button" value="Update"/>

# Selection list: item details

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[Dashboard](#)  
[Acquisitions](#)  
[Home](#)  
[Picklists](#)  
[Manage](#)  
[Title Search](#)  
[Funds](#)  
[POs](#)  
[Admin](#)

## Picklist *Comedy Films*

Create date: 2008-03-05  
Last updated: 2008-03-05  
Owner: berick

## Picklist Entry

Source native-evergreen-catalog  
Provider  
Create date 2008-03-05T12:16:47-0500  
Last update time 2008-03-05T12:16:47-0500

title       The ultimate improv book : a complete guide to comedy improvisation / Edward J. Nevraumont, Nicholas P. Hanson, with additional material from Kurt Smeaton.  
author      Nevraumont, Edward J., 1975-  
pagination iv, 272 p. ;  
isbn        1566080754 17.00  
publisher   Meriwether Pub.,  
pubdate    c2001.  
edition     1st ed.

**LDR** 00941cam a22002894a 4500  
**003** DYNIX  
**005** 20030311142449.0

# Selection list: title search

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[Dashboard](#)  
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[Home](#)  
[Picklists](#)  
[Manage](#)  
[Title Search](#)  
[Funds](#)  
[POs](#)  
[Admin](#)

## Search Sources

- Evergreen Catalog
- Z39.50 Sources
- loc z3950.loc.gov:Voyager
- oclc  
zcat.oclc.org:OLUCWorldCat  
\*

## Search Fields

Author

ISBN

ISSN

Item Type

LCCN

Publication Date

Publisher

Title Control Number

Title

Results Per Source

Submit

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# Purchase orders

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[Picklists](#)  
[Funds](#)  
[POs](#)  
[Manage](#)  
[Admin](#)

## My Purchase Orders

[View All POs](#) [New PO](#)

ID	Provider	Creation Date	Edit Date	Number of Entries	
<a href="#">1</a>	Books a Million	2008-03-09	2008-03-09	3	<a href="#">Delete</a>

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# Acquisition features on the roadmap

- MARC order record loader
- Out of the box provider support
  - Discovery protocols
  - EDI send and receive (built on BOTS)
  - MARC order records
- Request management
- Templates for simple acquisition reporting

A peek behind the curtain...  
(warning: code ahead)



# A Pylons (Mako) template

```
<%inherit file='../base.html'/>
<%namespace file='../common/widgets.html' name='widget'/>
<%def name="page_title()">${_('Create Funding Source')}</%def>
<%def name="block_content()">
<% from oils.org import OrgUtil %>

<form action='${c.oils.acq.prefix.value}/fund_source/create' method='POST'>
<table class='oils-admin-table'>
  <tbody>
    <tr>
      <td class='oils-admin-label'>${_('Funding Source Name')}</td>
      <td><input type='text' size='42' name='${c.oils.acq.fund_source_name.cgi_name}'/></td>
    ... </tr></tbody></table>
</%def>
```

# A Pylons controller

```
class FundingSourceController(BaseController):
```

```
    def view(self, **kwargs):
```

```
        r = RequestMgr()
```

```
        ses = ClientSession(oils.const.OILS_APP_ACQ)
```

```
        r.ctx.core.org_tree.value = OrgUtil.fetch_org_tree()
```

```
        source = ses.request(
```

```
            'open-ils.acq.funding_source.retrieve',
```

```
            r.ctx.core.authtoken.value, kwargs.get('id'), {"flesh_summary":1}).recv().content()
```

```
        Event.parse_and_raise(source)
```

```
        source.owner(OrgUtil.get_org_unit(source.owner())) # flesh the owner
```

```
        r.ctx.acq.funding_source.value = source
```

```
        return r.render('acq/financial/view_funding_source.html')
```

# Registering an OpenSRF service

```
__PACKAGE__->register_method(  
    method => 'retrieve_funding_source',  
    api_name    => 'open-ils.acq.funding_source.retrieve',  
    signature => {  
desc => 'Retrieves a new funding_source',  
params => [{desc => 'Authentication token', type => 'string'},  
            {desc => 'funding source ID', type => 'number'}],  
return => {desc => 'The funding_source object on success, Event on failure'}  
    }  
);
```

# Implementing an Opensrf service

```
sub retrieve_funding_source {
  my($self, $conn, $auth, $source_id, $options) = @_ ;
  my $e = new_editor(authtoken=>$auth); return $e->event unless $e->checkauth;
  $options ||= {};

  my $flesh = {flesh => 1, flesh_fields => {acqfs => []}};
  push(@{$flesh->{flesh_fields}->{acqfs}}, 'allocations') if $$options{flesh_allocations};

  my $source = $e->retrieve_acq_funding_source([$source_id, $flesh]) or return $e->event;

  return $e->event unless $e->allowed(['ADMIN_FUNDING_SOURCE',...],
    $source->owner, $source);

  $source->summary(retrieve_funding_source_summary_impl($e, $source))
    if $$options{flesh_summary};
  return $source;
}
```

# More resources

- Evergreen: <http://open-ils.org>
  - Blog: <http://open-ils.org/blog>
  - Mailing lists: <http://open-ils.org/listserv.php>
  - IRC: #OpenILS-Evergreen on freenode.net
- Evergreen acquisitions development server: <http://acq.open-ils.org/oils/acq/base/>
- Project Conifer: <http://conifer.mcmaster.ca>
- Coffee|Code (my blog): <http://coffeecode.net>