



SWAN Acquisitions and Cataloging Networking Group

September 11, 2025

Welcome and Introductions

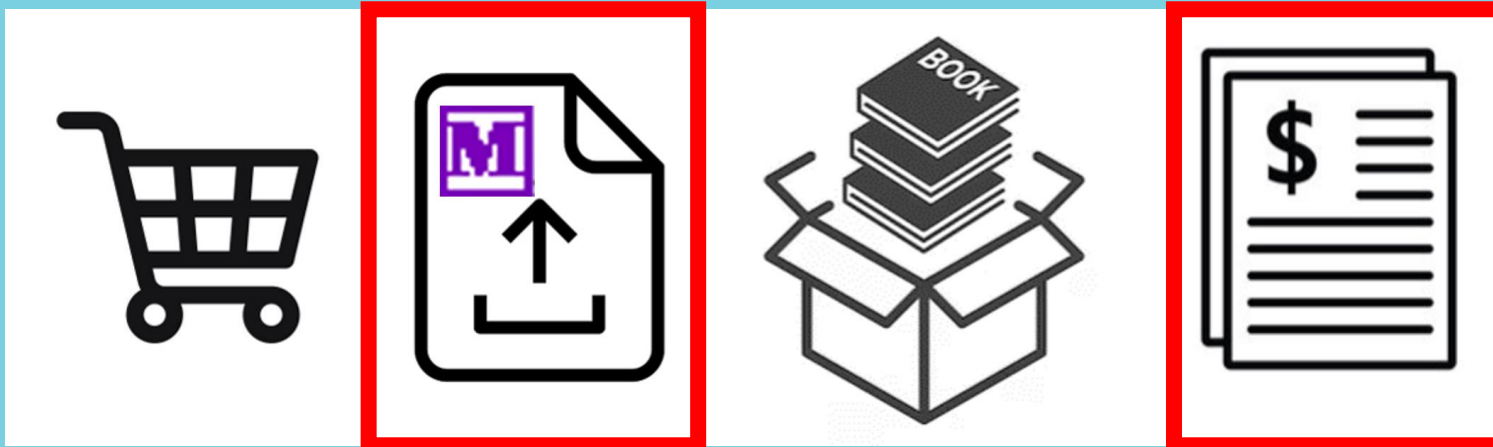
EDI Vendors Update

MarcEdit Workflow

Julie Tegtmeier
Cataloging & Data Librarian
St. Charles Public Library

Non-EDI Ordering

- Our process for non-EDI ordering is similar to EDI ordering but with a few key differences



Non-EDI Ordering – Title Selection

- Direct Order Spreadsheet – This is filled out by the CDLs and we require the following pieces of information:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	
URL	Title	Author	Additional Author	Fund	Material Type	Edition	Year	Collection Code	Quantity	Price (no \$)	ISBN	UPC	ASIN	Patron
https://www.amazon.com/Rozando-el-Cielo	Rozando el Cielo	Liz Tomforde		6000-850-50SP	BOOK		2024	SCD_ASPA	1	19.99	978-8419848260			2005
https://www.amazon.com/Contemporary-Piano-Masters	Contemporary Piano Masters	various		6000-782-50SHEET	SHEET MUSIC		2025	SCD_ANF	1		9781705189030			
https://www.amazon.com/Abilities-in-Me-ADHD	Abilities in Me: ADHD	Gemma Keir		6010-600-52	BOOK		2020	SCD_JNFN	1	12.67	979-8699504817			2005
https://www.amazon.com/Abilities-in-Me-Down-Syndrome	Abilities in Me: Down Syndrome	Gemma Keir		6010-600-52	BOOK		2020	SCD_JNFN	1	12.67	979-8699497447			2005
https://www.amazon.com/Abilities-in-Me-Speech-Delay	The Abilities in Me: Speech Delay	Gemma Keir		6010-600-52	BOOK		2020	SCD_JNFN	1	12.67	979-8675047888			2005
https://www.amazon.com/Abilities-in-Me-Autism	The Abilities in Me: Autism	Gemma Keir		6010-600-52	BOOK		2019	SCD_JNFN	1	12.67	978-1095358221			2005
https://www.amazon.com/Dino-Dino	Dino Dino	Diego Vaisberg		6010-982-52IE	BOOK		2018	SCD_JNF	1	15.99	9781536202809			

- URL
- Title
- Author
- Fund*
- Material Type*
- Edition*
- Year
- Collection Code*
- Quantity
- Price (no \$)
- ISBN
- UPC
- Patron Barcode
- Hold Location*
- CDL Date/Initials
- Additional Notes

Name	Description
SCD_AA	Saint Charles Adult Accessibility
SCD_ABLU	Saint Charles Adult Blu-ray
SCD_ABLUF	Saint Charles Adult Feature Blu-ray
SCD_ABLUFN	Saint Charles Adult New Feature Blu-ray
SCD_ABLUN	Saint Charles Adult New Blu-ray
SCD_ACD	Saint Charles Adult CD

Fund	Description
01-7202	Adult program supplies
19450	Friends Expense
19455	Foundation Expense
6000-000-50	AS Book General
6000-100-50	AS Book Philosophy Ethics
6000-200-50	AS Book Religion

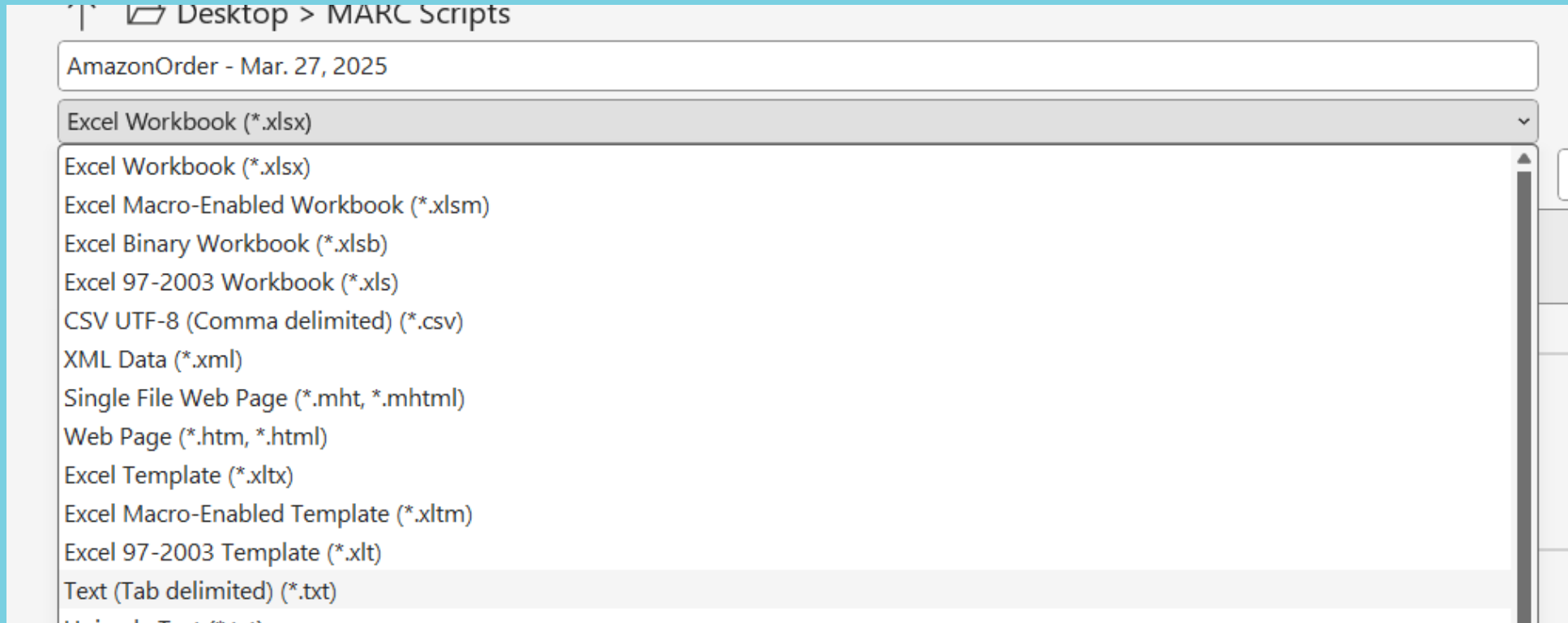
Non-EDI Ordering – MarcEdit

- New Excel Sheet

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	https://www.rosandoliz.com/	Rozando el Liz Tomforde			6000-850-50SP	BOOK		2024	SCD_AS	1	19.99	978-8419848260			2.01E+13	Main Librar	SS 4-7
2	https://www.contemporary.com/	Contempo	various		6000-782-50SHEE	SHEET MUSIC		2025	SCD_ANF	1		9.78E+12					SS 4-7
3	https://www.abilitates.com/	Abilitates in	Gemma Keir		6010-600-52	BOOK		2020	SCD_JNFN	1	12.67	979-8699504817			2.01E+13	Main Librar	JC 4/7
4	https://www.abilitates.com/	Abilitates in	Gemma Keir		6010-600-52	BOOK		2020	SCD_JNFN	1	12.67	979-8699497447			2.01E+13	Main Librar	JC 4/7
5	https://www.abilitates.com/	The Abilitie	Gemma Keir		6010-600-52	BOOK		2020	SCD_JNFN	1	12.67	979-8675047888			2.01E+13	Main Librar	JC 4/7
6	https://www.abilitates.com/	The Abilitie	Gemma Keir		6010-600-52	BOOK		2019	SCD_JNFN	1							/7
7	https://www.dino.com/	Dino	Diego Vaisberg		6010-982-52JE	BOOK		2018	SCD_JNF	1		978-8419848260			2.01E+13	Main Librar	JC 4/7
8												9.78E+12					
												979-8699504817			2.01E+13	Main Librar	JC 4/7
												979-8699497447			2.01E+13	Main Librar	JC 4/7
												979-8675047888			2.01E+13	Main Librar	JC 4/7
												978-1095358260			2.01E+13	Main Librar	JC 4/7
												9.78E+12			2.01E+13	Main Librar	JC 4/7

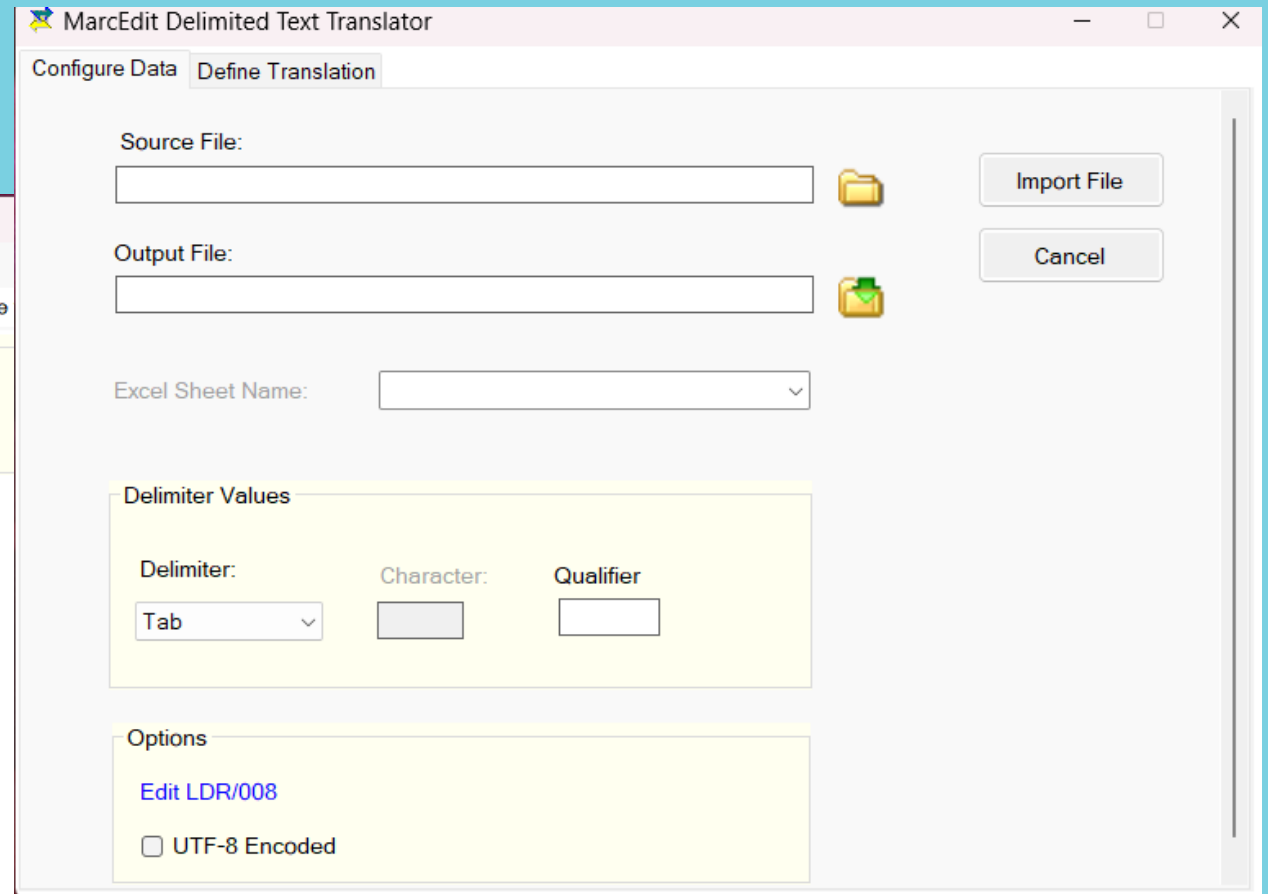
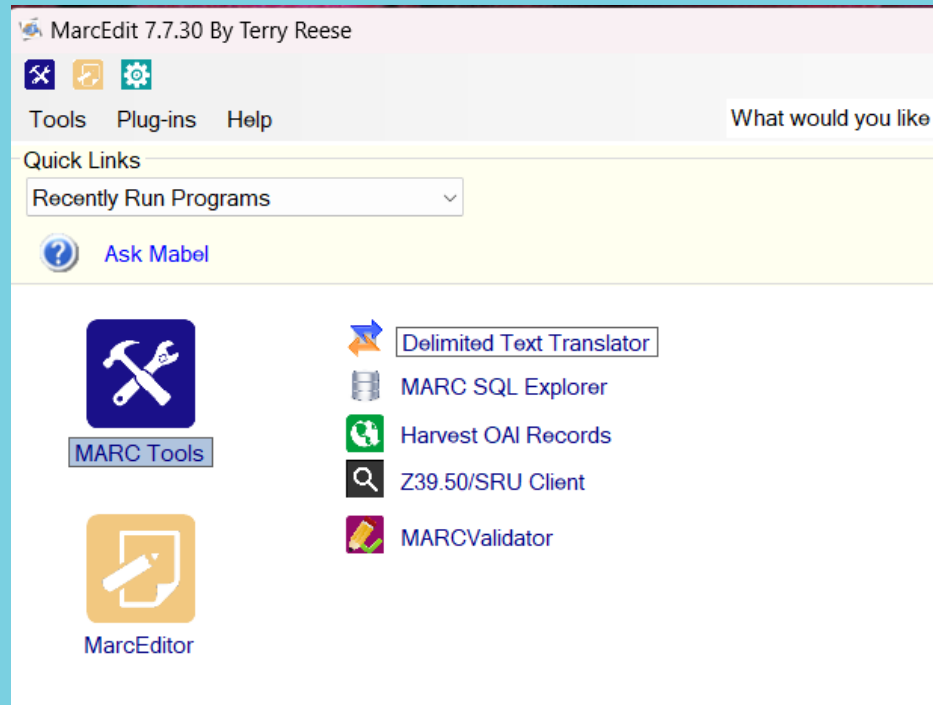
Non-EDI Ordering – MarcEdit

- Excel Rows to Tab Delimited Text



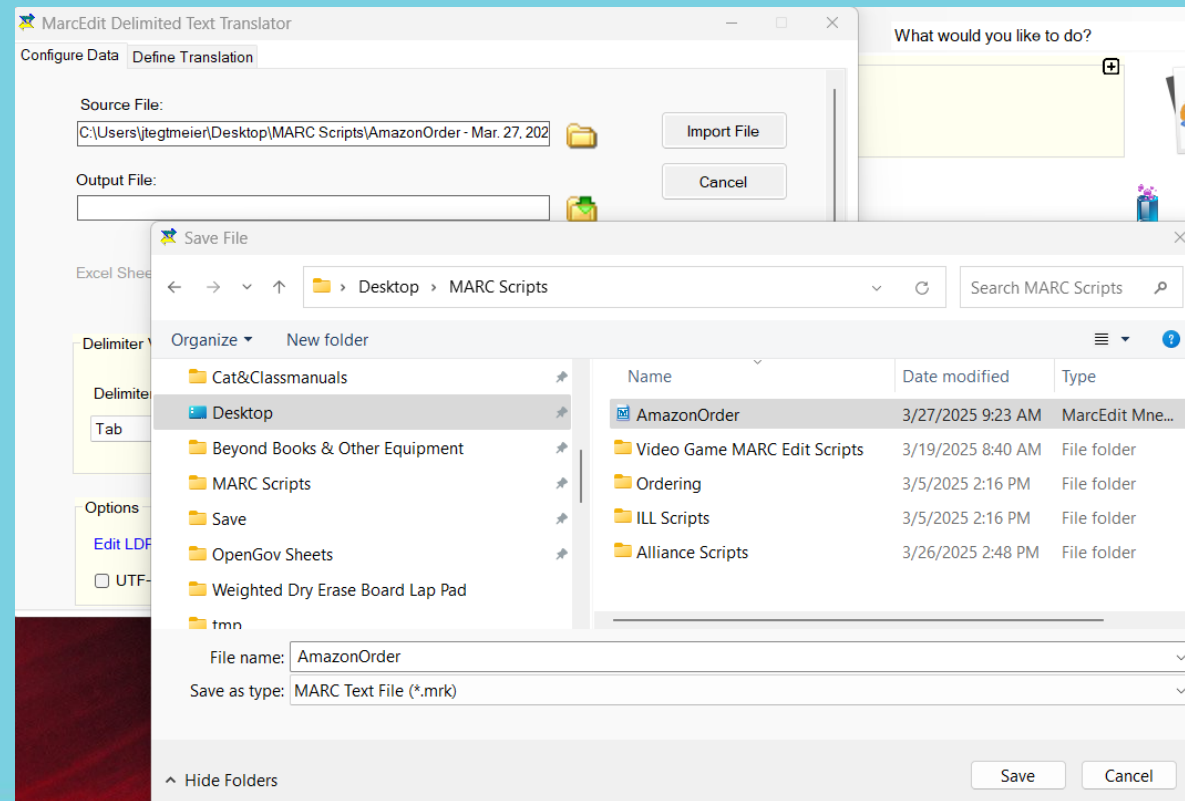
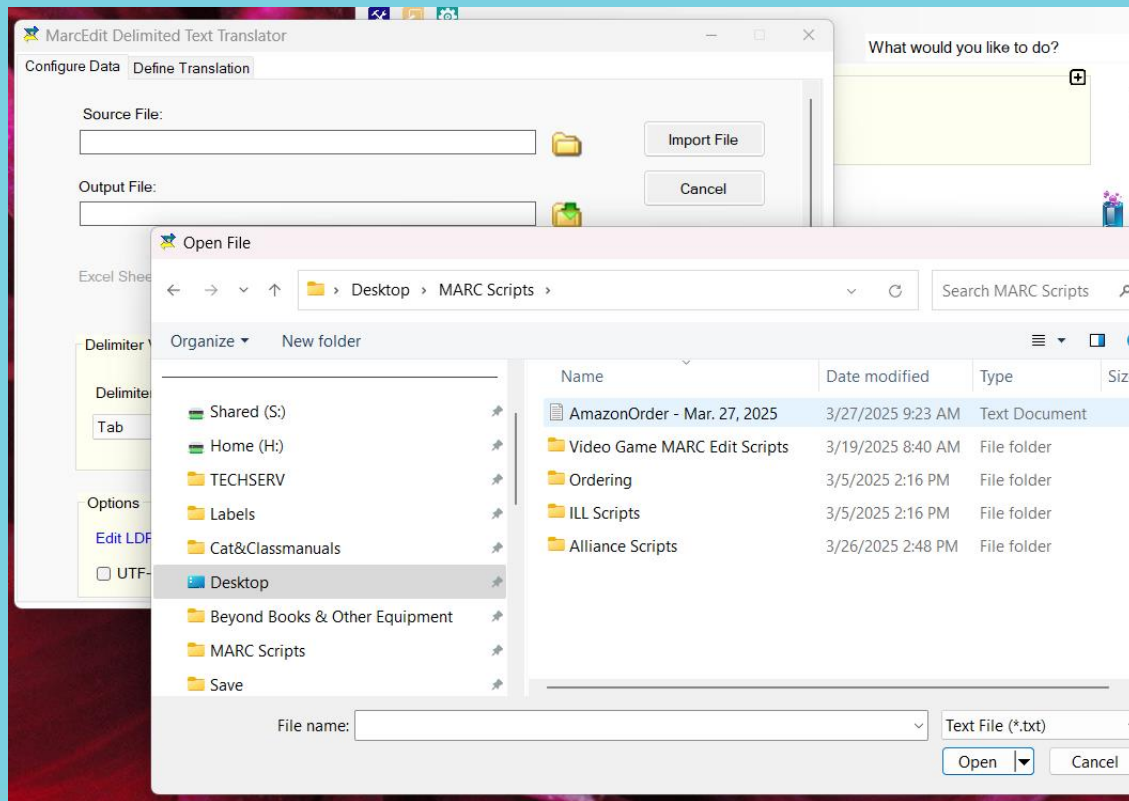
Non-EDI Ordering – MarcEdit

- Tab Delimited Text to MRK File



Non-EDI Ordering – MarcEdit

- Source File – Newly Saved Text File
- Output File – A MarcEdit Record



Non-EDI Ordering – MarcEdit

- Mapping Fields to MARC

MarcEdit Delimited Text Translator

Configure Data Define Translation

Data Snapshot

Field 0	Field 1	Field 2	Field 3	Field 4	Field 5	Field 6
https://...	Book ...	Book ...		6585	BOOK	
https://...	Large ...	Large ...		6585	LARG...	
...	...	...		6585	...	

Finish Cancel

Settings

Select: Map To: Indicators: Term. Punctuation:

☐ Constant Data ☐ Repeatable Subfield

Arguments

↑ ↓

Non-EDI Ordering – MarcEdit

- Mapping Fields to MARC

Settings

Select:

Field 0

Map To:

856\$u

Indicators:

\\

Term. Punctuation:

☐ Constant Data

☐ Repeatabl Subfield

Add Argument

Arguments

0 856\$u 0

↑

↓

Non-EDI Ordering – MarcEdit

- Our Mapping:

URL	Field 0	856\$u
Title	1	245\$a
Author	2	100\$a
Additional Author	3	700\$a
Fund	4	947\$f*
Material Type	5	590\$a
Edition	6	250\$a
Year	7	246\$c
Collection Code	8	947\$h*
Quantity	9	947\$q*
Price (no \$)	10	947\$p*
ISBN	11	020\$a
UPC	12	024\$a
ASIN	13	028\$a
Patron Barcode	14	947\$n*
Hold Location	15	947\$n*
CDL Date/Initials and Additional Notes	16	947\$n*

Arguments

0 856\$u 0
1 245\$a 0
2 100\$a 0
3 700\$a 0
4 *947\$f 0

☐ Save Template [Auto Generate](#)

☒ Sort Fields [Load Template](#)

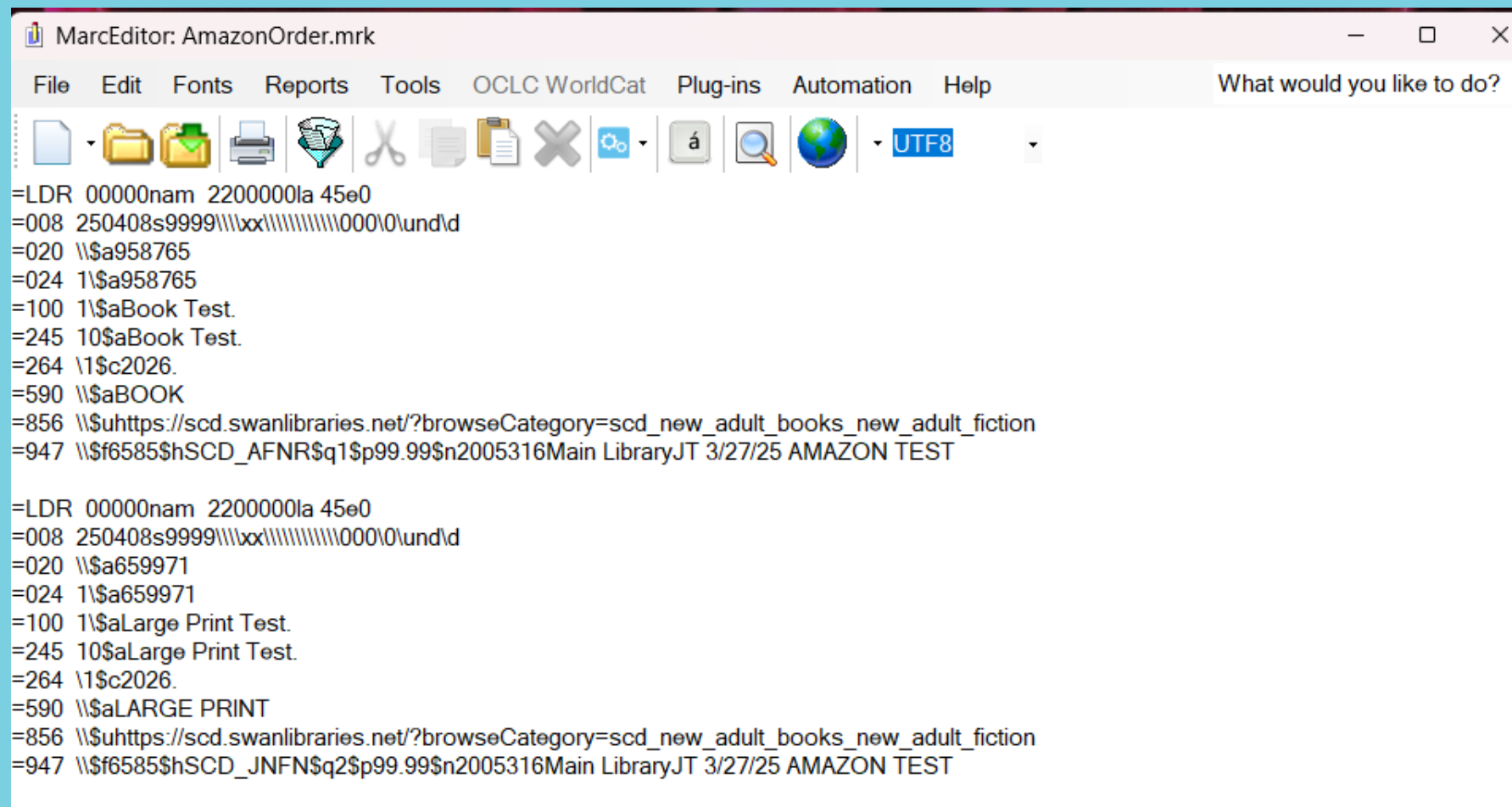
14 *947\$n 0
15 *947\$n 0

☐ Save

Edit Item
Delete Items
Join Items

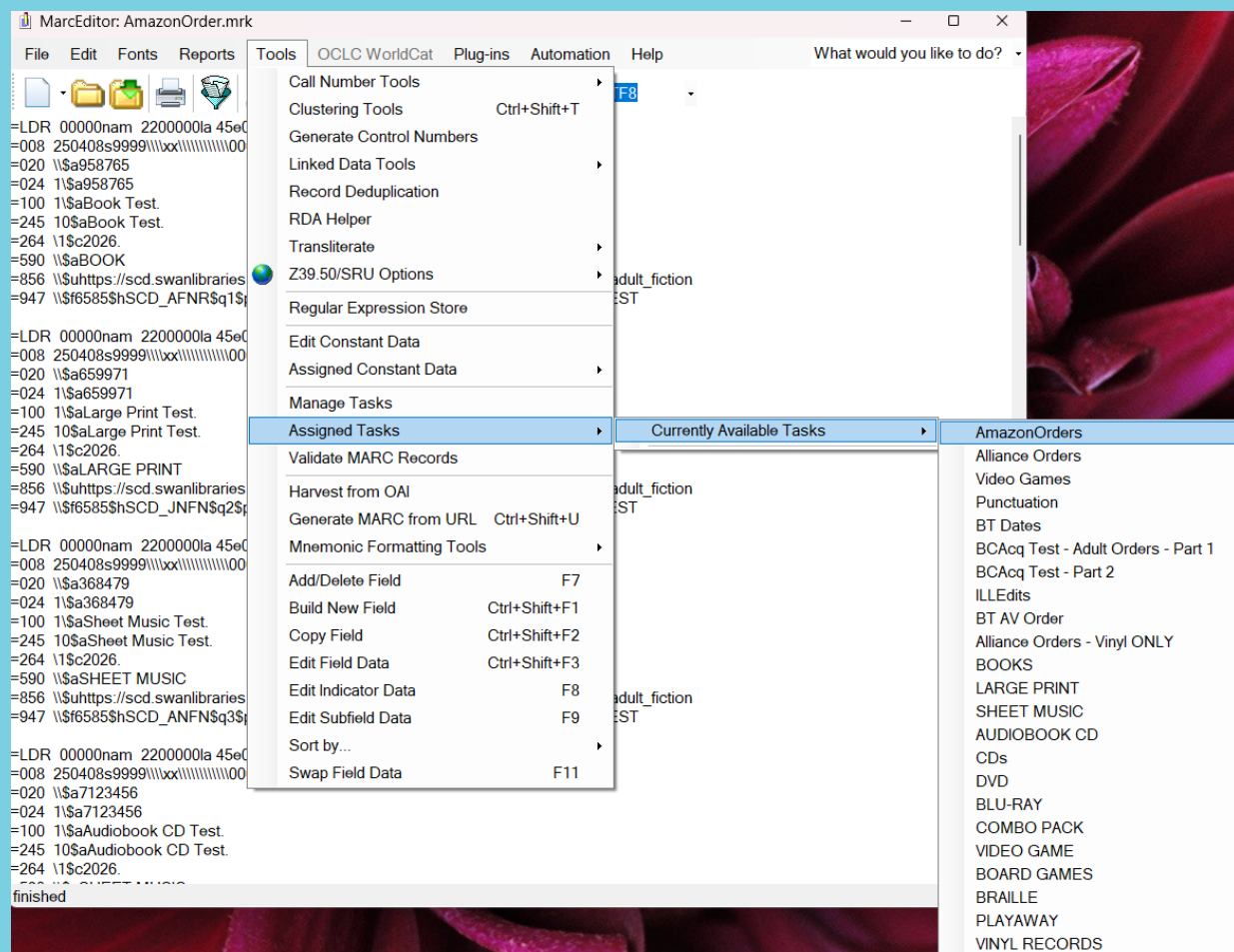
☐ Save Template

Non-EDI Ordering – MarcEdit



Non-EDI Ordering – MarcEdit

- On-Order Tasks



Non-EDI Ordering – MarcEdit

Edit Task List

Task List Name:
AmazonOrders

Description:

☒ Override Broker Action (not recommended)

Tasks:

ADD	099	\\\$aon order sc	100	
ADD	977	\\\$aPRE-CAT	100	
TASK_LIST		BOOKS	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macros\tasksfile-	
TASK_LIST		LARGE PRINT	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macro	
TASK_LIST		SHEET MUSIC	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macro	
TASK_LIST		AUDIOBOOK CD	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macro	
TASK_LIST		CDs	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macros\tasksfile-	
TASK_LIST		DVD	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macros\tasksfile-	
TASK_LIST		BLU-RAY	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macros\tasksfile-	
TASK_LIST		COMBO PACK	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macro	
TASK_LIST		VIDEO GAME	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macro	
TASK_LIST		BOARD GAMES	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macro	
TASK_LIST		BRaille	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macros\tasksfile-	
TASK_LIST		PLAYAWAY	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macro	
EDITFIELD	856	\$u	0	\$zClick Here for Additional Information\$u
SET005	\\			
TASK_LIST		Punctuation	C:\Users\jtegtmeier\AppData\Roaming\marcedit75\macro	
SORTBY	ALL	True	True	

Actions:

Save

Debug

Close

Edit Task List

Task List Name:
BOOKS

Description:

☐ Override Broker Action (not recommended)

Tasks:

ADD	300	\\\$apages. 106	=590	\\\$aBOOK
ADD	336	\\\$atext\$btxt\$2rdacontent	106	=590 \\\$aBOOK
ADD	337	\\\$aunmediated\$bnc\$2rdamedia	106	=590 \\\$aBOOK
ADD	338	\\\$avolume\$bnc\$2rdacarrier	106	=590 \\\$aBOOK

Edit Task List

Task List Name:
COMBO PACK

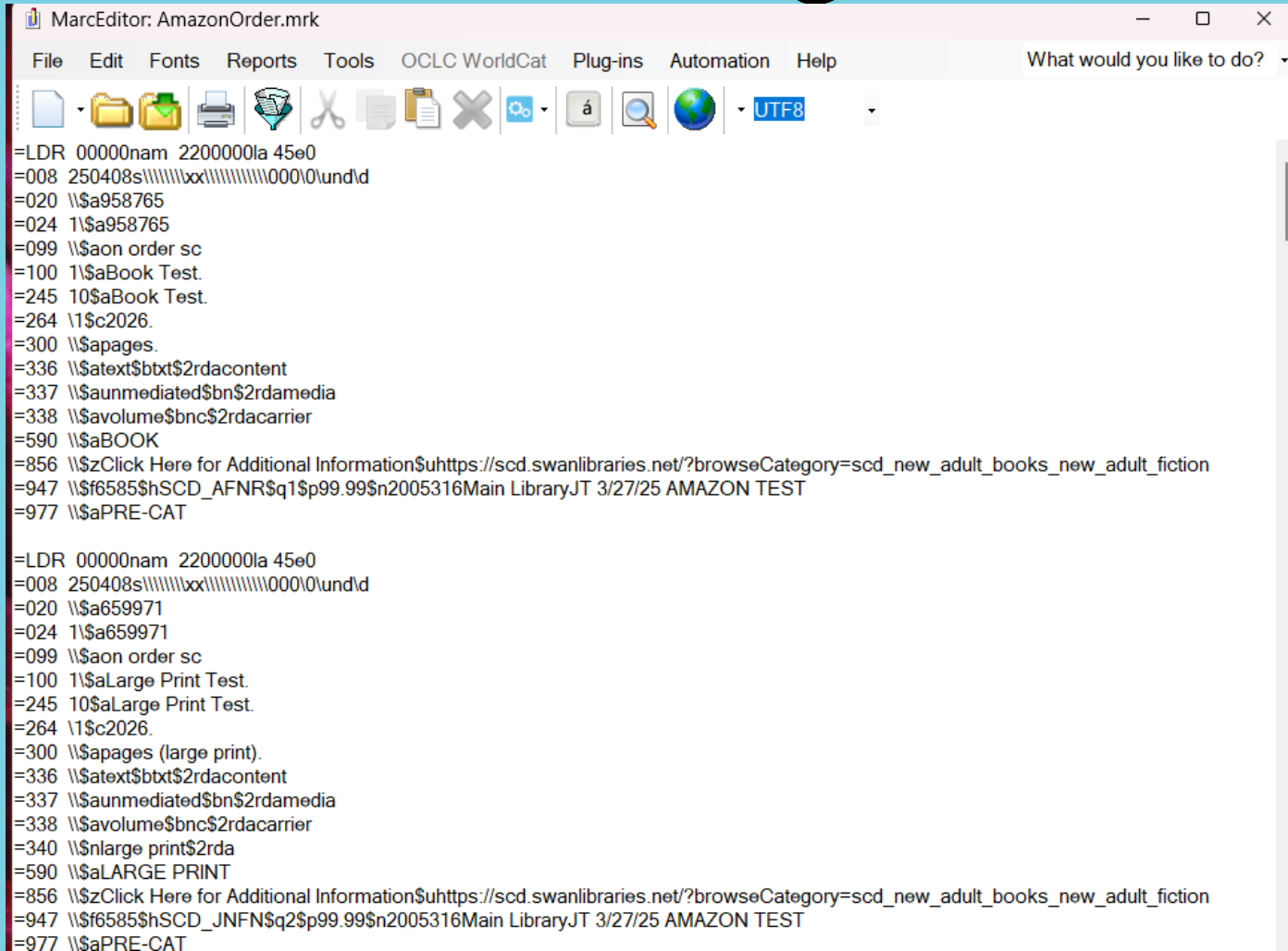
Description:

☐ Override Broker Action (not recommended)

Tasks:

ADD	007	\\wdc 106	=590	\\\$aCOMBO PACK
ADD	250	\\\$aBlu-Ray + DVD Combo Pack.	106	=590 \\\$aCOMBO PACK
ADD	500	\\\$aBlu-Ray + DVD Combo Pack.	106	=590 \\\$aCOMBO PACK
ADD	300	\\\$avideodiscs :\$bsound, color ;\$c4 3/4 in.	106	=590 \\\$aCOMBO PACK
ADD	336	\\\$atwo-dimensional moving image\$btdi\$2rdacontent	106	=590 \\\$aCOMBO PACK
ADD	337	\\\$avideo\$bvd\$2rdamedia	106	=590 \\\$aCOMBO PACK
ADD	338	\\\$avideodisc\$bvd\$2rdacarrier	106	=590 \\\$aCOMBO PACK
ADD	340	\\\$b4 3/4 in.\$2rda	106	=590 \\\$aCOMBO PACK
ADD	344	\\\$adigital\$boptical\$2rda	106	=590 \\\$aCOMBO PACK
ADD	345	\\\$b24 fps\$2rda	106	=590 \\\$aCOMBO PACK
ADD	347	\\\$avideo file\$bBlu-ray\$2rda	106	=590 \\\$aCOMBO PACK
ADD	347	\\\$avideo file\$bDVD video\$2rda	106	=590 \\\$aCOMBO PACK
ADD	538	\\\$aBlu-ray, DVD.	106	=590 \\\$aCOMBO PACK

Non-EDI Ordering – MarcEdit

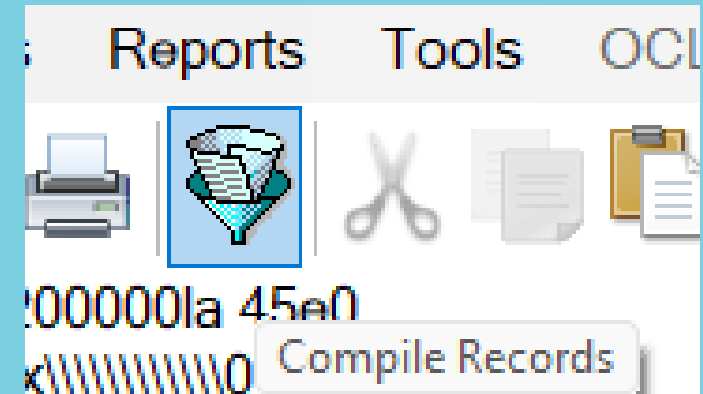


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MarcEditor: AmazonOrder.mrk
File Edit Fonts Reports Tools OCLC WorldCat Plug-ins Automation Help What would you like to do?
=
=LDR 00000nam 2200000la 45e0
=008 250408s|||||xx|||||000\0\undld
=020 \a958765
=024 1\958765
=099 \aon order sc
=100 1\Book Test.
=245 10Book Test.
=264 1c2026.
=300 \pages.
=336 \text$txt$2rdacontent
=337 \aunmediated$bn$2rdamedia
=338 \avolume$bnc$2rdacarrier
=590 \BOOK
=856 \zClick Here for Additional Information$uhttps://scd.swanlibraries.net/?browseCategory=scd_new_adult_books_new_adult_fiction
=947 \f6585$hSCD_AFNR$q1$p99.99n2005316Main LibraryJT 3/27/25 AMAZON TEST
=977 \aPRE-CAT

=LDR 00000nam 2200000la 45e0
=008 250408s|||||xx|||||000\0\undld
=020 \a659971
=024 1\659971
=099 \aon order sc
=100 1\Large Print Test.
=245 10Large Print Test.
=264 1c2026.
=300 \pages (large print).
=336 \text$txt$2rdacontent
=337 \aunmediated$bn$2rdamedia
=338 \avolume$bnc$2rdacarrier
=340 \nlarge print$2rda
=590 \aLARGE PRINT
=856 \zClick Here for Additional Information$uhttps://scd.swanlibraries.net/?browseCategory=scd_new_adult_books_new_adult_fiction
=947 \f6585$hSCD_JNFN$q2$p99.99n2005316Main LibraryJT 3/27/25 AMAZON TEST
=977 \aPRE-CAT

```



Non-EDI Ordering – Order Loading

1. MARC Order Import Wizard
2. biborderload Report
3. Load Flat Order Records

Non-EDI Ordering – Modify Order

- Update PO
- Place holds, verify order, etc.

Modify Order : Modify Order 0402AMAZON25; 2025; SCD; AMAZON

Order Orderlines

Order Basic Info

Date created:	4/2/2025	Date modified:	4/2/2025
Date ready:	4/2/2025	Date mailed:	4/2/2025
Date to claim:	NEVER	Date to cancel:	NEVER
New order ID:	0402AMAZON25		
Order type:	FIRM		
New vendor ID:	AMAZON		

Non-EDI Ordering – Receiving Items

- Add Ordered Items to Catalog Wizard

Non-EDI Ordering – Add Invoice Wizard

- Single Items

Invoiceline

Line:	0001	Link:	Order	
Amount:	14.99	Exchange:	TABLE	Quantity: 1
Order ID:	0402AMAZON25	Orderline:	3	Fiscal cycle: 202
Title:	Twelve Serenades. / Phillip Keveren.			
Acquisitions material type:				

Buttons: Add Invoiceline, Modify Invoiceline, Cancel, Close (b)

Taskbar: Add Invoice *

Non-EDI Ordering – Add Invoice Wizard

- Multiple Items

Add Invoice : Invoice Summary 111-5662785-96338361; AMAZON; SCD

Invoice Invlines

Lines:4; Quantity:4; Total amount:\$69.96;

Line	Quantity	Title	Amount	Link	Linked To	Fisc...	Date...	Part...	Cov...
0001	1	Florence Price: Rediscovered Gems for ...	\$19.99	Order	0402AMAZON25/1	2025	NEVER		
0002	1	Play Piano Again.	\$16.99	Order	0402AMAZON25/4	2025	NEVER		
0003	1	Kindness.	\$14.99	Order	0402AMAZON25/6	2025	NEVER		
0004	1	Bugs & butterflies search & find puzzle.	\$17.99	Order	0402AMAZON25/7	2025	NEVER		

Add Invoice Modify Invoice Add Another Invoice Close

Add Invoice * Pay Invoice * Add Invoice (3) *

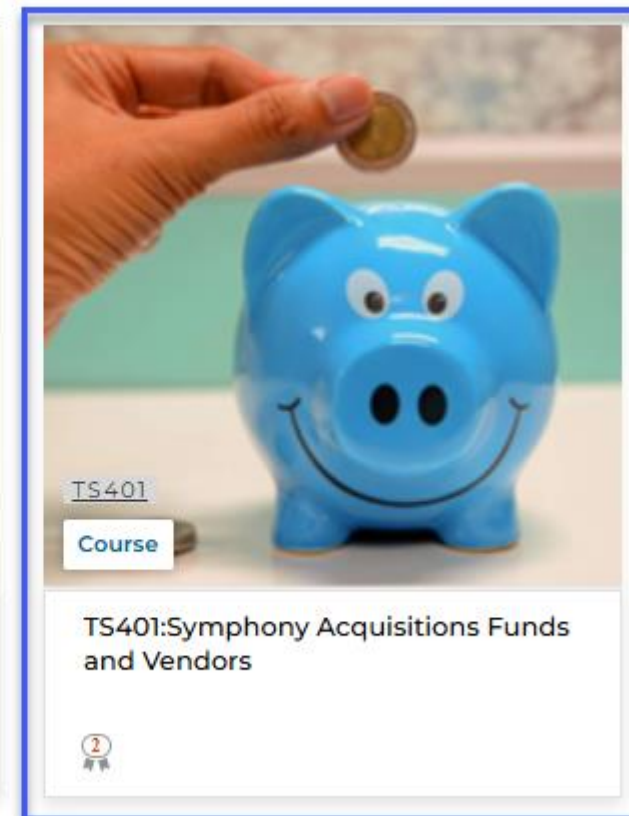
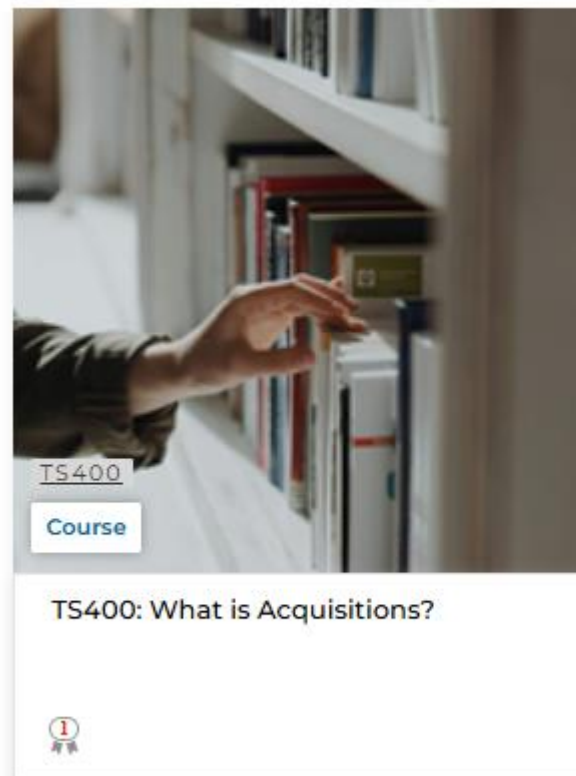
Invoice Selected Orderlines Cancel

INVOICE INVOICE

Add Invoice * Pay Invoice * Add Invoice (2) *

TS401 - "Symphony Acquisitions Funds and Vendors"

Check out our second Acquisitions course to learn all about Symphony funds and vendor records!



Library of Things Visibility Filter in Aspen

- Demo
- Filter based on Item Type
 - [Item Configuration](#) page of the support site
- Downers Grove live currently
- Go live for all SWAN libraries 9/30
 - Submit ticket for early start or to opt out

Update from Cataloging Working Group

Co-Chairs :

Susana Leyva (Downers Grove Public Library)

MaryKellie Marquez (Warrenville Public Library District)

Thank you for attending!

Next meeting: TBA

See you in 2026!