Functional Specifications

New Feature Summary
This document contains specifications for writing interfaces for managing acquisitions provider (AKA vendor) records in Evergreen using the Angular framework.

Overview
Current behavior
The existing staff interfaces for managing providers are legacy ones written using the Dojo framework and embedded via iframes. The primary interface, reached via /eg/staff/admin/acq/conify/provider, shows a grid of providers that can be filtered by org unit. From this grid, the user can create a new provider, edit an existing provider, or delete one or more providers. The interface for creating or editing a provider allows one to edit the following:

- base provider record (acq.provider)
- provider addresses (acq.provider_address)
- provider contacts (acq.provider_contact)
- provider contact addresses (acq.provider_contact_address)
- holding subfield mappings (acq.provider_holding_subfield_map)
- provider line item attribute definitions (acq.lineitem_provider_attr_definition)

The provider page also includes a tab with a filterable grid of invoices associated with the provider.

Development Plan
User interface
Staff user interface details
The new provider interface will have the following routes:

/eg2/$LOCALE/staff/acq/provider (for provider search)
/eg2/$LOCALE/staff/acq/provider/$ID (for accessing/linking to a specific provider)
/eg2/$LOCALE/staff/acq/provider/$ID/details (for accessing/linking to a specific provider and display the provider details tab)
The provider search page (staff/acq/provider) will be linked to from the Acquisitions menu in the navigation bar as well as from the Acquisitions Administration landing page.

The provider search/landing page will have a similar design to the patron management page and include the following UI elements:

- A summary pane on the left side displaying several attributes of the selected provider record
- A search form with a grid underneath allowing the user to search for providers
- A set of tabs for various components of the provider record that are active when a provider record is selected
- A modal for creating a provider record

As a result of work planned for Sprint 0, all grids in the Providers interfaces will have click-to-sort and allow sorting across the full dataset.

**Summary Pane**

The summary pane will not be displayed if no provider has been selected yet. However, similar to the patron summary pane, space will be reserved on the left hand side.

The summary pane will display the following elements:

- Provider name
- Provider code
- Provider owning library
- Provider ID
- Currency
- Primary Contact

If a provider is selected, the provider name and code will be displayed in the upper left corner, and will always be displayed even if the summary pane is collapses.

The summary pane will also include an indication of whether the provider is active or not.

The summary pane will have a control for expanding or collapsing itself from display.

The summary pane will include a button for deleting the provider. This button will be active only if there are no invoices or purchase orders associated with the provider. If the user clicks the button, a confirmation modal will be displayed requiring the user to confirm the deletion.
Search Form
The search form will be displayed when going to the providers search page. It will not be displayed by default when going directly to a particular provider, but a Provider Search button will be available to display the search form.

The provider search form will include the following fields:

- Name
- Code
- Owning Library
- Contact name
- Email
- Phone
- Currency
- Active

The checkbox for selecting active providers will be checked by default.

The provider search form will also include buttons for running the search and clearing the form.

The results of a search will be displayed in a grid. This grid will include column filtering as specified in Sprint 0. The provider name will be hyperlinked; clicking on it will select that provider, change the route to acq/provider/$ID, and hide the search form.

The grid will include an action to provider rows selected by the user. If the user invokes this action, a confirmation modal will be displayed requiring confirmation; it will also indicate whether any of the providers cannot be deleted due to being linked to purchase orders or invoices.

The grid will also include an action for creating a new provider record. Clicking it will invoke the provider creation modal described below.

Provider Record Tabs
The following tabs will be displayed but will not be active unless a provider is selected.

- Provider
- Addresses
- Contacts
- Attribute Definitions
- Holdings Definitions
- EDI
- Invoices
- POs

Users will have the ability to set a specific tab to be the default view when they open a Provider record.

The Provider tab will include the columns in the core provider record as editable fields and include Save, Cancel, and Delete buttons.
The Addresses tab will display a filterable grid of addresses and give the user the option to add, edit, and delete addresses.

The Contacts tab will display a filterable grid of contacts and associated contact addresses and give the user the option to add, edit, and delete contacts and contact addresses. Saving a contact and marking it as primary will, if another contact exists that is marked as primary, present a modal asking the user to confirm the change of primary contact.

The Attribute Definitions tab will display a grid of provider attribute definitions and give the user the option to add, edit, and delete attribute definition rows.

The Holdings Definitions tab will display a grid of MARC holdings subfield definitions and give the user the option to add, edit, and delete holdings subfield definitions. Above the grid will be a text input and a save button for updating the MARC tag itself.

The EDI tab will display a grid of EDI accounts associated with the provider. It will give the user the option to add, edit, and delete EDI account definitions. The grid will include an action to set a given EDI account as the default (i.e., active one); only one EDI account can be set as active at a time. The data entry form for an EDI account will include tooltips explaining the purpose of each field. The EDI tab will also include a button to view EDI messages associated with the provider; clicking this button will open a new window linking to the Dojo EDI Messages page (an Angular interface for viewing EDI messages will be written in Sprint 7).

The Invoices tab will display a filterable grid of invoices associated with the provider. By the default the grid will include the following columns:

- Vendor Invoice ID
- Receiver
- Shipper
- Complete?
- Invoice Date
- Invoice Type
- Note
- Payment Auth
- Payment Method
- Receive Method

The grid will have default filter conditions so that only active invoices are displayed by default.

The Vendor Invoice ID column will include hyperlinks that will open new windows/tabs to the Dojo invoice page. This will be replaced with the Angular invoice page in a later sprint.

The Purchase Orders tab will display a filterable grid of purchase orders associated with the provider.

By the default the grid will include the following columns:

- PO Name
The grid will have default filter conditions so that only active purchase orders are displayed by default.

The PO Name column will include hyperlinks that will open new windows/tabs to the Dojo invoice page. This will be replaced with the Angular invoice page in a later sprint.

Provider Creation Modal
The provider creation modal will allow the user to create a new provider. Only the base acq.provider fields will be included in this modal:

- Active (and the checkbox will be ticked by default)
- Provider Name
- Provider Code
- Currency
- Default Claim Policy
- Default # Copies
- EDI Default
- Owner
- URL
- SAN
- Prepayment Required

The modal will include Save and Cancel buttons. If the user saves a new provider, the route will change to acq/provider/$ID and the summary pane and Provider tab updated. A toast will also be displayed upon creation of the provider. If the provider cannot be created, an error message will be displayed and the user returned to the creation modal and given an opportunity to fix any problems with the data entry. Fields that are required will be marked as such in the form using standard form validity checking found elsewhere in the web staff client.

Other User Interface Details
The legacy provider management interface (/eg/staff/admin/acq/conify/provider) will be removed. The legacy URL route for a specific provider record will not be changed to a redirect to point to the new interface on the assumption that few if any users would have maintained bookmarks.

Similarly, the legacy Dojo EDI Accounts interface (/eg/staff/admin/acq/conify/edi_account) will be removed as well.

The legacy Dojo purchase order and line item table interfaces include links to the related provider record; these will be updated to point to the new Angular provider interface.

Workflow changes
No significant workflow changes are expected as a result of this sprint; the provider interfaces will simply be replaced with Angular versions.

**Settings & permissions**
No additional permissions will be created as a result of this sprint. Each new grid adding during this sprint will have a new workstation setting for saving grid configuration.

**Public catalog details**
The sprint makes no changes to the public catalog.

**Implementation Areas**

**Database**
This sprint makes no changes to database structure.

**Business Logic**
No changes to Evergreen APIs are expected; existing APIs and PCRUD APIs will be used for fetching and modifying provider data.

**Ancillary details**

**Identification of non-ordinary seed data**
No additional seed data is expected to be created for this sprint.

**Identification of any potential upgrade deviations**
No special upgrade considerations are expected as a result of this sprint.

**Security Consideration Planning**
This development introduces no special security concerns and maintains existing patterns of permission and authentication.

**Quality Assurance Planning**

**Performance Implications or Concerns**
There are no particular performance concerns associated with this work.

**Recommended Unit and Regression Testing**
Angular unit tests will be written for the new and updated components.

**Recommended Compliance and Accessibility Testing**
We will develop new features in accordance with existing OPAC WCAG compliance, and will test usability in desktop versions of Chrome and Firefox.

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Mockups

Mockups are for illustrative purposes only and details may change in the implementation at the discretion of developers.

Providers – Main Grid
New Provider

[Image of a screen showing a new provider dialog box with fields for Active, Provider Name, Provider Code, Currency, Default Claim Policy, Default # Copies, EDI Default, Owner, URL, SAN, and Prepayment Required. The dialog box has options to save or cancel.]
Provider Details

Initech (IT)

Provider | Addresses | Contacts | Attribute Definitions | Holdings Definitions | EDI | Invoices | POs
---|---|---|---|---|---|---|---
Initech | | | | | | | |

Active: Yes
Provider Name: Initech
Provider Code: IT
Provider ID: 4
Currency: USD
Default Claim Policy: 1
Default # Copies: 1
EDI Default: 

Owner: BR1
HQ Phone:
Primary Contact: Peter Gibbons
Phone:
Fax:
Email:
URL:
SAN: 1234567
Prepayment Required: 

Save | Cancel | Delete

Can set default view of tabs

Populates from Provider Contact
## Provider Address

### Initech (IT)

<table>
<thead>
<tr>
<th>Provider</th>
<th>Addresses</th>
<th>Contacts</th>
<th>Attribute Definitions</th>
<th>Holdings Definitions</th>
<th>EDI</th>
<th>Invoices</th>
<th>POs</th>
</tr>
</thead>
</table>

### New Provider Address

<table>
<thead>
<tr>
<th>#</th>
<th>Address Type</th>
<th>Street 1</th>
<th>City</th>
<th>State</th>
<th>Country</th>
<th>Post Code</th>
<th>Valid?</th>
<th>Primary?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Billing</td>
<td>112 Main Street</td>
<td>Boring</td>
<td>MD</td>
<td>USA</td>
<td>35813</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Columns:**
- Address Type
- Provider
- Street 1
- Street 2
- City
- County
- State
- Country
- Post Code
- Fax
- Valid?
- Primary?

**Actions:**
- Delete Selected
- Add New Address
- Edit Address

[https://webby.evergreencatalog.com/eg/staff/acq/provider/4/addresses](https://webby.evergreencatalog.com/eg/staff/acq/provider/4/addresses)
Provider Address – Add/Edit modal
Provider Attribute Definitions

Image of a webpage showing the provider attribute definitions for Initech (IT) with columns for provider, address, contact, attribute definitions, holdings definitions, EDI, invoices, and POs. The interface includes options for provider search and new provider, as well as a table for new attribute definitions with columns for code, description, identifier, remove, and XPath. Instructions are given for actions such as delete selected, add new attribute, and edit attribute.
Provider Holdings Definitions

Initech (IT)

Update MARC Tag: [ ] Save

<table>
<thead>
<tr>
<th>#</th>
<th>MARC Tag</th>
<th>Subfield</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>949</td>
<td>b</td>
<td>barcode</td>
</tr>
<tr>
<td>2</td>
<td>949</td>
<td>n</td>
<td>call_number</td>
</tr>
<tr>
<td>3</td>
<td>949</td>
<td>m</td>
<td>circ_modifier</td>
</tr>
</tbody>
</table>

Columns: as shown
Actions: Delete Selected, Add Holdings Definition, Edit Holdings Definition
Provider Holdings Definitions – Add/Edit modal
# Provider EDI Accounts

## Evergreen Staff Acquisitions

[https://webby.evergreencatalog.com/eg/staff/acq/provider/4/edi_accounts](https://webby.evergreencatalog.com/eg/staff/acq/provider/4/edi_accounts)

### Providers

<table>
<thead>
<tr>
<th>Initech (IT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
</tr>
<tr>
<td>View EDI Messages</td>
</tr>
<tr>
<td>New EDI Account</td>
</tr>
</tbody>
</table>

EDI Messages will link to Dojo EDI Messages page until Sprint 7, when EDI interfaces will be addressed.

<table>
<thead>
<tr>
<th>#</th>
<th>Label</th>
<th>Host</th>
<th>Username</th>
<th>Password</th>
<th>Account</th>
<th>Owner</th>
<th>Last Activity</th>
<th>Path</th>
<th>Incoming Directory</th>
<th>Vendor Account Number</th>
<th>Vendor Assigned Code</th>
<th>EDI Attribute Set</th>
<th>Use EDI Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Columns: as shown

Actions:
- Add New Account
- Edit Account
- Delete Selected
- Set as Default
- View EDI Messages

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equinoxinitiative.org
Provider EDI Accounts – Add/Edit modal

EDI Account

- Label
- Host
- Username
- Password
- Account
- Owner
- Path
- Incoming Directory
- Vendor Account #
- Vendor Assigned Code
- EDI Attribute Set
- Use EDI Attributes

Save  Cancel

https://webby.evergreencatalog.com/eg/staff/acq/provider/4/edi_accounts
### Provider Invoices

**Evergreen Staff Acquisitions**

Get provider invoices via the URL: [https://webby.evergreencatalog.com/eg/staff/acq/provider/4/invoices](https://webby.evergreencatalog.com/eg/staff/acq/provider/4/invoices)

#### Providers

**Initech (IT)**

<table>
<thead>
<tr>
<th>Provider</th>
<th>Addresses</th>
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<th>Attribute Definitions</th>
<th>Holdings Definitions</th>
<th>EDI</th>
<th>Invoices</th>
<th>POs</th>
</tr>
</thead>
</table>

#### Vendor Invoice Details

<table>
<thead>
<tr>
<th>#</th>
<th>Invoice ID</th>
<th>Receiver</th>
<th>Shipper</th>
<th>Complete?</th>
<th>Invoice Date</th>
<th>Invoice Type</th>
<th>Note</th>
<th>Payment Auth</th>
<th>Payment Method</th>
<th>Receive Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td># input</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>3</td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

**Invoice ID is clickable to receive invoice (open in new browser tab)**

**Columns**: as shown

**Actions**: none
Provider POs

![Image of Evergreen Staff Acquisitions interface](https://webbyevergreencatalog.com/eg/staff/acq/provider/4/purchase_orders)

**Providers**

<table>
<thead>
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<th>Invoices</th>
<th>POs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initech (IT)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Table:**

<table>
<thead>
<tr>
<th>#</th>
<th>PO Name</th>
<th>Ordering Agency</th>
<th>Creation Time</th>
<th>Edit Time</th>
<th>State</th>
<th>Cancel Reason</th>
<th>Order Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Text</td>
<td></td>
<td>/ /</td>
<td>/ /</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PO Name will link to Purchase Order (open in new browser tab)
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  - a URI or hyperlink to the Licensed Material to the extent reasonably practicable;
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