

## NAAUG 5<sup>th</sup> Annual Meeting

### Notes from the EDI Topical Discussion held Monday, June 14<sup>th</sup>, 2004

#### Match points for serials invoicing through EDI

- The question was raised as to which match point(s) were being used in ALEPH for serials invoicing
- Iowa mentioned that they had found that the serials vendor reference number was the primary match point in 14.2, which became problematic (the order number was the secondary match point) – to solve the problem, the vendor reference numbers were then stripped from the invoices so that only the order number would be available as a match point
- Another institution (TN?) reported that in 15.5 the invoicing seemed to work with the inclusion of the vendor reference number
- Ya'aqov Ziso of Ex Libris stated that the acquisitions order number is now the first priority match point

#### Successful vendor list?

- A question was asked if there was a list of all of the vendors that were successfully exchanging EDI messages with ALEPH customers as well as the types of messages that were being exchanged – no formal list was available, but the following vendors were mentioned by attendees; Swets, Harrassowitz, Ebsco, Ingram, and YBP
- Ya'aqov Ziso also mentioned that he has a list of 12 first tier vendors that Ex Libris and its customers wanted to do EDI business with

#### Mailing list?

- An inquiry was made as to whether or not an EDI discussion list existed – Christine Moulen of MIT stated that a list had been created by Michael Kaplan of Ex Libris following an informal exchange between some customers, vendors, and Ex Libris, but that there had not been much activity on it – the listserv is hosted by Ex Libris and you can contact Michael Kaplan ([michael@exlibris-usa.com](mailto:michael@exlibris-usa.com)) if you are interested in being added to the mailing list

#### EDI working group

- Janet Hulm of the University of Iowa mentioned that the NAAUG Steering Committee had requested that an EDI working group should be formed that could meet with some vendors and Ex Libris at the next ALA Midwinter meeting
- Kim Maxwell of MIT stated that a similar endeavor had already taken place in Chicago back in the fall of 2000

#### EDI in version 16.02

- A question arose as to how EDI worked in version 16

- Ya'aqov Ziso stated that the following functionalities were tested and are currently working; orders, order changes, cancellation of orders, receiving and sending serials invoices, claims for monographs and serials, and monograph invoicing – he said he would send this information to the NAAUG list

#### Reports from institutions

- Harvard is currently trying to work on EDI orders in version 16 – they mentioned problems with file names that were too long
- South Dakota Library Network is currently trying to work with the vendor Ingram
- Mankato(?) has been running test invoices from Ebsco – they have been getting errors with ISSN numbers - they have also had invoices that failed to load when there were more than 1000 line items, which proved to be a good stress test
- The University of Tennessee is on 15.5 and working with serials invoicing with Swets but not Harrassowitz

#### Various

- Ya'aqov Ziso noted that a PRB is going to be created that will be used both by the US and Israel offices instead of separate ones
- Ya'aqov Ziso also asked what should the priority be for EDI functions; invoicing, ordering or claiming

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