ELECTRONIC DATA INTERCHANGE:

Help or Hindrance?

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What is EDI?

- Electronic Data Interchange
  - “The transfer of structured data, by agreed message standards, from one computer application to another by electronic means with a minimum of human intervention.”
  - “the direct communication of trading messages between computer systems, using national and international telecommunications networks.”
  - “paperless trade”
EDI technical requirements:

- Standards
  - .X12
  - EDI FACT
- “Match” Points
  - Standard number
  - Order number
  - Vendor reference number
- “Trading Partners”
  - Library
  - Supplier
- Software
  - Loader
- Data Transmission
  - Internet
Uses of EDI:

- Processing invoices (debits and credits)
- Processing orders and order acknowledgement
- Processing claims and claims responses
- Journal dispatch data
- Pricing and bibliographic data
Benefits of EDI:

- Improves Efficiency
- Reduces Errors
- Reduces repetitive tasks
- Increases speed and accuracy of communications
- Enables data sharing
- Modifies Workflow
- Reduces delivery times
- Improves service
ALEPH at USMAI:

- Version 15.2
- 16 independent libraries
  - 1 ADM
  - 1 BIB
  - 16 ordering units
- Migrated from 3 different systems
  - Invoices handled:
    - Manually
    - Via tape load
    - By EDI
- Working with serials invoices
  - Three vendors:
    - EBSCO
    - Harrassowitz
    - Swets
Getting ready:

- Establish working relationships with vendors
- Start process well in advance
- Understand terminology
  - Order number; Title number
- Update records
  - Order number & subscription ID
  - Budgets and encumbrances
ML9204200003
Vendor Ref RB6478300AB443323670
ISSN 0953-8186
Title INTERNATIONAL JOURNAL OF REFUGEE LAW /IJRL/ ALL EXCEPT UK
Amount 300.44
Budget
Note Coverage period: Jan 01, 2001 - Dec 31, 2001

ERROR ERROR: Unable to determine matching order: (order number) ML9204200003 (vendor ref) RB6478300AB443323670
Vender Reference Number in Aleph was RB6478300AB443323753
## Updating information:

<table>
<thead>
<tr>
<th>Title</th>
<th>ISSN</th>
<th>Type of Publication</th>
<th>Frequency</th>
<th>Customer Code</th>
<th>Library Order No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archiv des Öffentlichen Rechts</td>
<td>0003-8911</td>
<td>print journal</td>
<td>quarterly</td>
<td>BALTI-LAW</td>
<td>MLA2275000003</td>
</tr>
<tr>
<td>Archiv für die Civilistische Praxis</td>
<td>0003-8997</td>
<td>print journal</td>
<td>every 2 months</td>
<td>BALTI-LAW</td>
<td>MLCNV0007257</td>
</tr>
<tr>
<td>Asia Pacific Journal on Human Rights and the Law</td>
<td>1388-1906</td>
<td>print journal</td>
<td>semi-annual</td>
<td>BALTI-LAW</td>
<td>MLCNV0000311</td>
</tr>
<tr>
<td>Auckland University Law Review</td>
<td>0067-0510</td>
<td>print journal</td>
<td>annual</td>
<td>BALTI-LAW</td>
<td>MLCNV0006416</td>
</tr>
<tr>
<td>Australian Law Journal</td>
<td>0004-9611</td>
<td>print journal</td>
<td>monthly</td>
<td>BALTI-LAW</td>
<td>MLCNV0007231</td>
</tr>
</tbody>
</table>
Ex Libris Loader:

Service charges not added automatically

Invoices do not balance

Testing in live database not available

Reports are poor
USMAI Loader:

- Line item added for service charge
- Invoices balance
- Testing in a “live” environment
- Preload reports
Testing:

- Initially
  - Check data elements
  - Modify incoming data file

- Ongoing
  - Load in report mode
  - Verify Aleph data
Notification:

From: EBSCO ILS-EDI Services <ILSEDIServices@EXCHANGE.EBSCO.COM>
To: Yalan Qi - Univ of Maryland Thurgood Marshall Law Lib
<edinv@itd.umd.edu>
Sent: Mon, 10 May 2004 12:06:32 -0400 (EDT)
Subject: EBSCO Invoice File

The EBSCO Subscription Services invoice information that you requested in ALEPH 500 EDIFACT format is now available for pickup via the INTERNET. In order to do an FTP file transfer via the INTERNET, you will need our Node Name, your USERID, and a password as follows:

NODE NAME: FTP.EBSCO.COM
USERID: ALE0005
PASSWORD: EBSCOINT
FILENAME: R051004.T105658.INV

TRANSFER TYPE IS ASCII
NOTE: PLEASE BE AWARE THAT YOUR FILES WILL BE AVAILABLE FOR PICKUP FOR 30 DAYS FROM THE DATE OF THIS EMAIL ONLY.

A file summary is included below for your reference:

<table>
<thead>
<tr>
<th>Trans Date</th>
<th>Account #</th>
<th>Invoice #</th>
<th>Invoice Date</th>
<th># Line Items</th>
<th>Total Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>20040510</td>
<td>RB6478300</td>
<td>7568898</td>
<td>04292004</td>
<td>2</td>
<td>757.22</td>
</tr>
</tbody>
</table>

Total Number of Line Items and Total Amount = 2 757.22
Going live:

Line item details

Service charge
Help or Hindrance?

- **Cons:**
  - Requires significant development effort
  - Time consuming preparations
  - Effort is front loaded
  - Not all processes can be handled by EDI
  - Ongoing maintenance required

- **Pros:**
  - Speeds up processing
  - Streamlines workflow
  - Reduces likelihood of errors
  - Avoids rekeying data
  - Frees staff to attend to more complex tasks and resolve problems
  - Improves communication between trading partners
What’s next:

- EDI invoicing with more vendors
- Additional types of EDI transactions
- Ever larger percentage of transactions will be handled by EDI
- Libraries have to continue to lobby for EDI with their trading partners
Very Selected References:


- Boissy, Robert W. “Elements of Style for Next Generation Serials Electronic Data Interchange.” *Serials Librarian*, v. 38, no. ½, 2000, p. 69+


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- EDItEUR – [www.editeur.org](http://www.editeur.org)

- ICEDIS (International Committee on EDI for Serials) – [www.icedis.org](http://www.icedis.org)