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Let's Get Technical — EDI: Understanding the Benefits of EDI and Tips for a Successful Implementation

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Column Editor's Note: In this month's column, the benefits of EDI or Electronic Data Interchange are described. **Carol Seiler**, Account Services Manager at **EBSCO** and her colleague **Anne Campbell**, outline the advantages to moving to EDI as well as helpful tips for implementation. — **SM & AM**

What is Electronic Data Interchange?

Electronic Data Interchange (commonly called "EDI") has been around since the 1970s. EDI is the computer-to-computer exchange of business documents in a standard electronic format between business partners. It was developed to electronically communicate information between systems, primarily business documents such as invoices or orders. In the 1980s, the United Nations developed EDIFACT (Electronic Data Interchange for Administration, Commerce and Transport). As computer to computer communication became more normalized, Extensible Markup Language (XML) standards merged with EDIFACT to become what libraries use to electronically (and often automatically) transmit and map invoices, claims, and orders to various Integrated Library Systems (ILS).

ILS began in the 1970s, as librarians expanded on sharing electronic cataloging records. Many libraries started with homegrown systems whilst the industry started to develop commercial systems. As the commercial systems grew, so did the demand for more automation.

In the 1990s, EDI started being utilized in other industries — the practice became popular between book stores and publishers. **EDiTEUR** (<https://www.editeur.org/>) is the international group coordinating the development of the standards infrastructure for electronic commerce in the book, eBook and serials sectors. **EDiTEUR** was established as a membership organization in 1991 and went global in 1994. Working on behalf of libraries, publishers, aggregators and agents, they provide global standards for many types of bibliographic, e-commerce, publishing, and rights management.

Librarians, always on the lookout for useful technology, began to investigate and invest in EDI technology in their ILS. Various vendors such as **Faxon** (now defunct), **Harrassowitz, Blackwell** (now defunct), and **EBSCO** worked with ILS companies developing EDI to allow libraries to electronically transmit orders and claims to the vendor and download invoices from the vendor into the ILS.

Benefits of EDI

Librarians quickly found that downloading an invoice and posting electronically to their ILS alleviated overworked staff, saved time and increased accuracy of the data. Reports and details on cost could be generated with minimal work. Transmitting orders and claims via EDI to the vendor also reduced human error and accelerated the process.

The road to successful EDI is relatively short, given the benefit. However, each ILS has slightly different requirements and functionality with regards to EDI. The key to all, for success, is exact match on the linking data. Computers are literal in their work — a variation or oddity can create an error. This means for success, the ILS and the vendor must have a specific match point and it must match exactly.

The standards that exist today for the library, book and serials market are thorough and extensive. Libraries who

invest in understanding and configuring their system to transmit business documents with vendors reap the rewards of efficiency and automation.

Most ILS vendors actively promote their EDI functionality and encourage customers to use it as they know the value and time-savings associated with electronic transactions. In addition, book and serials vendors also invest in architecture, expertise and technical services to ensure their customers are taking full advantage of the automation.

The Setup of EDI Transactions

Below is a list of criteria a library should expect to encounter when working with their book or serial vendor to setup EDI transactions.

Accurate explanation of the EDI service: An "Introduction Guide" to their technical and EDI Services should be provided. These guides should provide a high-level overview of the service and include basic details that can be shared with non-technical staff to provide an overview of the service and its value.

Clear on-boarding instructions: This is a more detailed explanation of the steps that must be completed for setup. This may resemble a "task list." The value of this document is to identify the appropriate contact from the library who should participate in the project and what tasks must be completed for each step.

Setting expectations: Not all vendors support every individual service for your ILS. Knowing this in advance will alleviate unintended delay and disappointment during testing and setup. It's hard for the library to know every question to ask in advance, especially if you're moving to a brand-new system. Keep in mind, your vendor has supported many customers with various scenarios and had to field many questions. Vendors are usually aware of what they do and do not support. Ask your vendor if any enhancements are planned and/or scheduled for a specific service and how you will benefit from it.

Efficient timing and accuracy: Communication of deadlines is key. When libraries migrate from one system to another, there's a significant amount of setup that must be complete before the "go live" date. For example, if a library expects to load an EDI Renewal Invoice for serials by a specific date, that date should be clearly communicated, and all parties and efforts must work toward the goal of meeting that date.

Partnerships in trouble-shooting and escalation: It's difficult to be in between two vendors when trying to troubleshoot. Don't hesitate to ask for a dual-vendor meeting to review an issue that remains unresolved. Talking through an issue with representation from the library and each vendor usually results in quicker resolution. Sometimes it's difficult to know why you're receiving an error. Is it an ILS or a vendor issue? Everyone working together can usually result in a quicker resolution.

Testing: The key to a successful "go live" date is successful testing. Test, test and test again.

Ongoing support: Know who to contact when you have a question or receive an error in your system. When you encounter an issue, vendor technical support staff love screenshots and as much detail as you can provide. The more detail you provide up front when requesting support, the faster the issue can be resolved.



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Additional Considerations:

- Are you moving to a new system?
 - Check with your new vendor to see what support is offered; check with your old vendor to see what can be exported and transferred to the new system
 - Ask for references or post on a list serv for contacts, contact others who have successfully loaded EDI into the new system.
 - See if you can transfer your existing records into the new system and use the same established match point (each ILS can have a different location for the match point, consult your ILS and vendor as to the match point in the ILS).
- What detail do you want to load?
 - Speak with the vendors to see what information will load via EDI.
- Do you have enough time?
 - Establishing the EDI link can take time, speak with the vendor about the time requirements to establish and test the EDI loading.
- Are you experiencing issues in loading EDI?
 - Capture screen shots and send these to the vendor. Often, they can help troubleshoot the setup or where something may be amiss.

Get Involved

Everyone can make a difference and have input and insight into updating current standards and designing new standards to meet the ever-evolving changes in the library industry. Consider serving as a member on a national or international standards committee. Check out organizational websites like **NISO** and **EDItEUR** (to name a few) to learn more. Membership is not required to attend webinars, join a mailing list or read the latest news and events, but don't hesitate to consider joining an interest group when it covers a topic of interest or expertise. Collaborating with colleagues and vendors on these committees is both valuable and imperative to shape the future of standards in the library industry.

Final Thoughts

Clear communication is key in ensuring the success of EDI. Schedule telephone conferences, online meetings, or in person visits with the vendor. Exchange detail and screenshots to demonstrate and note the progress and process. Pull in representatives from each team, library and vendors, to work together to establish the need, determine the best match point, and test the connection and load until successful (and perhaps once or twice after a successful load to ensure all aspects are covered and captured).

Each partner has the expertise in each system. Librarians know the library workflow and needs; the ILS vendor knows what can and cannot be automatically loaded into their system; the book and serials vendors know what information can be extracted and sent (or received) in their systems. Working together, across the library/vendor divide, ensures the success of establishing EDI in each library.

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