Biz of Acq -- EDI in DRA and SIRSI: Current Status of Electronic Data Interchange in Both DRA and SIRSI, and Areas for Future Enhancements

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Biz of Acq — EDI in DRA and SIRSI: Current Status of Electronic Data Interchange in Both DRA and SIRSI, and Areas for Future Enhancements

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Abstract
Use of EDI (Electronic Data Interchange) can enhance library operations. Beta testing of EDI with the DRA Classic system at Jackson Library, University of North Carolina at Greensboro, is described: the testing process, problems discovered and solved, and ongoing concerns. EDI is currently in operation at Jackson Library. Workflow advantages and disadvantages are presented. The authors discuss the role of the ILS vendor in setting up EDI operations and highlight current EDI capabilities of selected book and serial vendors.

Keywords
EDI, Electronic Data Interchange, ILS, integrated library system, BISAC, vendor

What is EDI?
EDI (Electronic Data Interchange) is a standard that provides for direct transmission of business data from one computer to another. When used between libraries and vendors, or vendors and publishers, EDI transmits orders, bibliographic records and invoices in a structured electronic format. It allows libraries and vendors to transfer data quickly and easily — when it works the way it ought to work. Two standards are currently used for EDI: the X12 standard, developed by the American National Standards Institute, and the UN/EDIFACT standard developed in Europe. Each standard has mandatory and optional elements. Certain data elements called “match points” instruct the computer where to place data, linking messages sent by one communication partner to another. Possible match points are ISSN or ISBN, purchase order number, invoice number, or price. Match points are generated by the integrated

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<http://www.against-the-grain.com>
library system (ILS) software, or by the book subscription vendor's internal system.

**EDI Use in Libraries**

EDI can be used with firm orders and invoices for monographs, with library approval plan shipments, and with serials orders, invoices, and claims.

Using EDI with firm orders is more efficient than dealing with email orders or orders sent by regular mail. The library can transmit purchase orders for firm orders directly to the vendor, saving time, paper, and postage. With EDI, there is no need for the vendor to re-key the order and payment information from the customer. Being able to accept electronic orders is faster for the vendor and also more accurate than re-keying information. Order fulfillment time is shorter, and that is a definite benefit for both vendor and customer. The library saves the time that would be needed to print, sort and mail paper orders, and the vendor has no need to open mail, identify the customer, add the orders to the string of orders waiting to be entered into the database, and then do data entry. The vendor sees cost savings because order administration, deliveries and payments are all simplified.

**UNCG's Beta Testing of EDI**

Walter Clinton Jackson Library, the University of North Carolina at Greensboro, purchased EDI software and wanted to make use of it with the library's DRA Classic system. Beta tests of EDI procedures began in May 1999. It was expected that tests would continue for six months, by which time the EDI process was expected to be functional. Instead the testing lasted more than a year, with additional problems and testing needs once EDI was in operation. Players included DRA's EDI specialist, two library systems staff, the Head of Acquisitions, Acquisitions Department support staff, and the book supplier's EDI specialist. Getting EDI up and running required a truly orchestrated effort.

With so many players, coordinated testing became a challenge. Everyone involved had a lot to be contacted by email for a week in advance of a test transmission. It was necessary to set up separate EDI test accounts with the book supplier, so that test orders would not be confused with orders on live accounts. Acquisitions support staff had to be ready to use procedures not normally needed in their work routines. After every test, the library needed to report problems to DRA and to the book supplier, await software updates, then coordinate loading the new versions of Acquisitions.exe and so on.

**Technical Requirements in DRA**

Before testing was carried out, the library set up EDI data in the DRA Acquisitions Policy File, and X12 defaults in the Supplier Record.

Directories set up on VAX Alpha and in the Acquisitions Policy File were:

- DRA1:[edi.inbox]
- DRA1:[edi.outbox]
- DRA1:[edi.history]
- DRA1:[edi.log]

The Policy File also included a template for a default fund, location code and quantity (one copy). The Acquisitions module's supplier file also needed to have X12 values filled in. Some of the supplier data necessary for EDI communications was not readily at hand. An example was the library SAN (Standard Address Number), a seven-digit identifier assigned to organizations served by the publishing industry. Jackson Library's SAN had to be obtained from B. Bowker, the U.S. SAN agency, before testing could begin.

**Problems Identified from Initial Testing**

DRA's implementation of EDI could not work with multiple funds within a purchase order. This presented practical problems because it would be unusual at Jackson Library (or at most other libraries) to place firm orders from one fund only. The library was put into the position of testing EDI without using purchase orders. This meant testing a "reverse order," that is, moving invoice line items using EDI for the library's approval plan books. The vendor placed an EDI invoice with line items on their FTP (file transfer protocol) server. A support staff person at the library "pulled the invoice" into a flat file, translated it, then moved the invoice line items into DRA. It was necessary to link the EDI invoice line items with their prices to bibliographic records before creating an invoice in DRA Acquisitions.

The first step needed to "pull" and translate an invoice is mostly manual. Several problems presented themselves in testing this process. The library needed unique invoice numbers from the vendor, numbers that would not be confused with non-test invoices. Some kind of loader program was needed to provide brief bibliographic records with database control numbers (DBCNs). It was necessary to link the invoice line items manually, one by one, to the bibliographic records. Finally, although the invoice header moved, the line items moved, and the move was ostensibly complete, the DRA messages that appeared were deceptive. "Quantity received" showed as "0." If questioned, it would be difficult to justify expenditures of library funds while the system recorded zero quantities received!

Continued testing of EDI invoices with approval plan shipments yielded more problems. A system message, "record too large for user's buffer," meant making successive changes until a staff member's PC could accept the file sizes received.

There are two modes of transferring files between computers: ASCII and binary, and these control the way the computers communicate. Only the vendor could supply the information for the supplier file X12 defaults.

The library created ordering templates in DRA that did not work with EDI at this stage of testing. The default account in DRA had to be changed from "Debit" to "Deposit," and it persisted after changing itself back.

On one EDI invoice, the supplier coded the amount of tax incorrectly, being off by a decimal point. Then and now, the library continues to receive paper copies of invoices in approval shipments to check the accuracy of the invoices sent electronically.

At last, on August 12, 2000, Jackson Library had its first more-or-less successful transmission of an EDI invoice. The invoice header moved, all the invoice line items moved at once, and all linked with DBCNs onto a DRA invoice. The status message in the system was correct, and the default quantity shown equaled, as it should, "one." The account type remained "deposit" after it was modified. EDI was put into operation in September 2000 with approval plan shipments and invoices.

**EDI in Operation at UNCG**

Using EDI to receive and pay for shipments of approval books has streamlined the workflow. These basic steps are followed:

- The vendor, YBP, transfers brief bibliographic records for books in an approval shipment directly to the library's server using FTP.
- A staff person in the Acquisition Department downloads these bibliographic records to the library's DRA system as one file.
- The brief records are later overlayed by the Cataloging Department with higher-level records downloaded from OCLC.
- After the shipment arrives, the same Acquisitions staff person downloads YBP's invoice for the approval books. The invoice, like the bibliographic records, is sent to the library by FTP. Approval books are put on display in Technical Services. They remain on display for a week while subject specialist librarians review them and make the decision to keep or return specific books.
- The library maintains a balance in a YBP deposit account so the invoices received by EDI are not actually forwarded for payment. They are recorded in the DRA system and charged to the balance in the library's deposit account.
- Generally, using EDI saves library staff a considerable amount of tedious and time-consuming data entry. Some title-by-title work still is necessary. For example, there is no need to create a purchase order in DRA for the approval books, but the titles must be searched individually in the library's database so no duplicate copies are added to the collection.
- Because of the way DRA works and since there is no purchase order in the system, all EDI invoice line items must be individually linked to the bibliographic records in the database. Then an invoice can be created in DRA. The line items are moved using the DRA "move all" command, and then the invoice is approved and paid in the system.
- The most noticeable advantage of using EDI at Jackson Library has been the saving of staff time. The vendor's brief bibliographic records are sent directly from YBP's system and continued on page 80.
BORN & LIVED: I was born and raised in northwest Indiana (about 20 miles from downtown Chicago). I lived in Bloomington, Indiana, for five years while in and out of college. Later I lived for awhile in Williamsburg, Virginia, then Ann Arbor, Michigan, before settling in Baltimore, Maryland.

EARLY LIFE: I was a brat, hopelessly spoiled by parents, grandparents, aunts, and uncles. During my pre-K years, I endlessly asked "Why?" and became infamous in my neighborhood for my absolutely incessant question-asking, along with the numerous "pretty little dresses" I ruined making "rub-ties" with a little boy down the block. Later I read voraciously, played softball, hung out at the beach or the pool, and at the library, where the librarians knew me by name. I was "book-smart," had grandiose dreams, and incredible wanderlust, while lacking in all common sense. I did not want to grow up and be a librarian, because my mother told me that's what I should grow up and be.

FAMILY: I have a four-year-old son, and a husband who lives with his girlfriend. I have a large, closet-sized extended family in the Chicago area that I don't get to see nearly enough.


FIRST JOB: During my high school years, I did semi-volunteer work in a convalescent home feeding elderly people who couldn't feed themselves. So, I stopped wanting to be a doctor and started not knowing what I wanted to be. Sometime after that, the need for money lead me to become a full-time fast-food worker. Finally I listened to my mother and decided to become a librarian.

PROFESSIONAL CAREER AND ACTIVITIES: My first library position was as a graduate assistant working with Slavic language approval plans at Indiana University. My first librarian position was working on a grant at the Center for Research Libraries cataloging foreign language newspapers. Later I cataloged historical newspapers on grant at the College of William and Mary, and was a Serials Cataloger at the University of Michigan. While working with serials, I was active in NASIG and served four years on its Electronic Communication Committee. Currently I'm the Acquisitions Librarian at the University of Maryland, Baltimore County. I edit the "Biz of Acq" column in Against the Grain, and serve on the University of Maryland and Affiliated Institution's Serials/Acquisitions Small Working Group for the consortial implementation of the Ex Libris integrated library system.

IN MY SPARE TIME: LIKE TO: Most of my time is used up with work, raising my son, and improving my 100-year old house by painting, dry walling, refinishing floors, etc. I dream a lot of what I will do when I have spare time again. I would like to spend more time with nature, more time listening to music, more time gardening, and maybe even someday doing volunteer work with children or the elderly. I also occasionally dream of finding and buying antique furniture in poor condition and refinishing it. I do occasionally find time to read and float in my pool.

FAVORITE BOOKS: Ifs Robert Heinlein's Time Enough for Love, although I'm a bit reluctant to admit it publicly, given the amount of incest in it. It's composed of a serious of stories, and as a whole, the book is about things like the will to live, happiness, love, and social mores. While Science Fiction isn't my favorite genre, in this case Heinlein uses science fiction to challenge how we think about ourselves, and in my mind, to question the interrelationship between logic and emotions and how society values them.

PET PEEVES/WHAT MAKES ME MAD: Closed-mindedness. When people can only see one side of an issue. When people see everything as either black or white. When people can't get out of the little programs running in their heads to see or understand something different or new. And the worst: When I do those things myself!

PHILOSOPHY: Figure out what works and do it. Feelings come, feeling go.

MOST MEANINGFUL CAREER ACHIEVEMENT: I've done all kinds of things I'm really proud of, but ultimately, I think it's the times I've been really good at motivating people that have been most meaningful, whether it's "planting" an idea and just letting it grow, or recognizing a quality, or really listening and building a consensus based on what I've heard, or even simply pushing for more or better work. Nothing meaningful I've done could have been done without the other people who worked on it or toward it.

GOAL: I HOPE TO ACHIEVE FIVE YEARS FROM NOW: I would like to be involved in creating a library portal that is as easy, as natural, as useful, and as popular as Amazon.com, and I would like to make it integrated with campus information and classroom software so that users could seamlessly and easily use everything we have available for them. This is probably not a realistic goal, and it's not really in my job description as an acquisitions librarian, but it's what I'd really like to do. However, there is some small hope, so wish me luck. If I dream big, maybe I'll achieve big.

WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: Likely someone will invent an ebook that people want to buy and read. Some library vendors might find a way to compete with online consumer vendors like Amazon.com and Barnes & Noble.com in terms of stock and speed of delivery. Maybe a library vendor will partner with an online consumer book dealer, offering specialty library services using the online consumer book dealer's Website and stock of books, giving libraries the best of both worlds. Journals may start to be cut out of the information chain as they become increasingly irrelevant as the package which articles come in. Someone in the industry will likely suffer a catastrophic loss of data due to a hacker or a virus. Oh, and we'll all replace all of our CDs and DVDs with the next thing that comes along.

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downloaded in large batches with minimal manual intervention. Invoices are processed more quickly with EDI than if they had to be keyed in, even with the item-by-item linking of line items with bibliographic records that is necessary in DRA.

Cooperating to make the EDI process workable and putting the process into practice has created a close link between YBP and the library. Creating customer loyalty of that kind surely would help to make EDI attractive to any vendor.

Testing EDI Purchase Orders

At Jackson Library, using EDI with the YBP approval plan but not with firm orders or with serials means that the library is making only partial use of the EDI software it purchased.

After a software rewrite in 2001 that allowed use of multiple funds, Jackson Library began another series of tests with the goal of using EDI with firm orders for monographs. Again, the library first needed to clarify with the vendor, YBP, which accounts would be used for which kinds of EDI orders. It was found that only one account could be set up at a time in the DRA supplier records. Due to information missing from the supplier record, the initial transmissions failed.

The steps necessary to placing an EDI purchase order are as follows:

Create a regular purchase order in DRA

Match points are the ISBN numbers, vendor ID and library ID (SAN)

When ready to place the order, select the EDI option from the "PO Place & Print" screen

An automated FTP process translates the flat file to a purchase order file, runs the FTP commands, verifies the file transfer, and updates the purchase order screen.

This process, for some reason, is fully automated while "pulling" an EDI invoice is not.

Results of Purchase Order Testing

The library carried out EDI tests with a handful of firm orders. All of the funds added to the DRA Acquisitions Policy file were worked and allowed various funds on one purchase order. Matching occurred on the ISBNs. Transmission was instantaneous to the vendor, and the order status was quickly updated and accurate in DRA.

No manual linking of invoice line items to bibliographic records was necessary, and this seemed to promise that EDI would be an even greater timesaver with firm orders than it is with approval shipments.

Unfortunately, there was a show stopper. The library staff who create purchase orders and place orders often need to add notes to the purchase orders. They create such notes as these:

Notify requester when book arrives
Notify Reference when book arrives
Hold book for requester
Prepay (a note added in the PO header screen)
Rush order
Rush invoice (refers to payments made to small booksellers)
One copy to Reference/one copy to Stacks (when more than one copy of a title is ordered)
Bill Special Collections
Ship to Special Collections

Without these notes for firm orders, books would not be purchased.
be properly routed for processing. However, when the Acquisitions staff received EDI purchase orders in the DMA system, they found that it would be necessary to look at the purchase orders two levels past the initial purchase order header screen to find and read any notes. DRA was not willing to develop the software further, although the library offered some fairly uncomplicated solutions.

EDI purchase orders were never put into operation at Jackson Library. No testing was done on how well EDI purchase orders would work in conjunction with DRA invoices for firm orders. Without using EDI on more than a test basis for firm orders, it was impossible to tell if the process would save time and costs for the library.

Disadvantages and Barriers to the Use of EDI

EDI is still used more extensively by businesses than by libraries. It takes just as much work to set up EDI procedures for a small or medium-sized library as it does to set up EDI for a large chain that would use it for many thousands of transactions a year.

The amount of change necessary to internal routines and procedures when EDI is first used in a library may be a barrier. Library support staff have been asked to change many of their procedures in the last few years, and they may see a move to EDI just one change too many.

Libraries interested in using EDI may be discouraged by their book vendors’ inability to support them. Purchasing EDI software is expensive for a vendor, and it will not be considered unless the vendor expects a volume of business sufficient to justify the expense. Using EDI will never be practical with every type of order. For example, we could not use it with an order to a small dealer for one out-of-print book. This means that there will always be multiple procedures for acquisitions staff to follow, and EDI will be one procedure among many. Furthermore, parts of the EDI process may never be entirely automated, and manual intervention will be necessary at one or more stages of the process. For example, DRA planned to automate the purchase order acknowledgement procedure, but that did not happen during testing with YBP. YBP sent email acknowledgements of purchase orders instead, but email acknowledgement is less desirable than EDI acknowledgement since ordinary email does not interface with the DMA system.

Libraries that have not purchased EDI software may be discouraged by the prospect that standards are changing. XML (Extensible Markup Language) is a newer format for the exchange of business data, and it may replace the X12 and EDIFACT standards libraries and their vendors are using now.

On 12 March 2003 Eric Thronson sent a posting headed “XML Library Orders Document” to the discussion list AUTOACQ, on behalf of the Internet Commerce Committee of BISAC, the Book Industry Standards Committee. At ALA Midwinter 2003, the Internet Commerce Committee was given the responsibility of developing XML standards for EDI transactions for both library and retail uses. Thronson wrote referring to a preliminary committee document titled “XML Order Functionality.” He said:

“There are many standards (X12, EDIFACT, BISAC, etc.) of EDI out there already and multiple flavors of each. We tried to design this document so that it incorporates all of the functionality of every other standard, plus a whole lot of stuff that the others can’t do. For this and other reasons that I won’t go into right now, we expect the XML documents to gradually supplant the existing standards.”

Software vendors are providing XML extensions to their products. XML “profiles” are created for non-PC devices that can access the Internet, like PDAs, cellphones, and even televisions. (Kennedy 76). Libraries could purchase and operate XML software locally, or they could lease a system through an ASP, an Application Service Provider. With an ASP offering, the modules of a library management system would work through Web interfaces. No software would be loaded locally other than the Web browsers. Many software companies find this a good way to protect their software from piracy, and they are able to make more money by licensing than by selling their software.

EDI vs. Email Ordering or Vendor Online System Ordering

Even in this digital age, libraries spend a great deal of time doing paperwork. EDI is working for many book and serials vendors and their library customers, but libraries still make heavy use of email, faxes and hard copy purchase orders and invoices.

Currently, firm orders that Jackson Library places with YBP are sent using the email function available in DMA Acquisitions. No paper purchase orders or print-outs are needed. The Acquisitions staff find this method easy and efficient, although placing EDI firm orders would also be simple. The staff would choose a different menu item number to send the purchase order, rather than choosing the DRA email function. As described above, however, the problems with EDI and firm orders were with receiving rather than ordering.

One Acquisitions staff member has preferred to use YBP’s Web-based customer interface, GOBI, to place firm orders with YBP. An advantage she found in using GOBI was that any of the library’s YBP account numbers could be entered in an online order. In contrast, with EDI ordering in the DMA system, it is impossible to set up more than one designated account at a time. Currently, a DMA deposit account for approval plan purchases is the default account for EDI. The order template has been set up this way in the DMA supplier file. If the library placed firm orders by EDI and changed them to another account, the template would have to be changed first or the staff person would have to type in a new account number in each purchase order she entered.

Both email ordering and ordering by way of the vendor’s Web-based system are supplemented at Jackson Library with telephone orders, orders sent by fax or regular mail, and orders (usually for out-of-print books) placed by ordinary email messages to vendors.

When the staff use DRA email, or mail print-outs of DRA purchase orders, the orders have been created in the DRA system. When they place orders by phone, or via regular email, the order data must also be keyed into DRA. That, of course, is a duplication of effort.

Role of the Book Supplier in Setting Up EDI Operations

Libraries planning to implement EDI need help and cooperation from both their ILS vendor and their book and serials vendors. The kind of help that is needed goes beyond queries of the kind that can be answered at the usual Help Desk. Because Jackson Library worked closely with YBP in setting up EDI, we asked for input from Ann-Marie Breaux of YBP on the kind of support she provides for libraries working with a variety of ILS vendors. Breaux now works full-time with testing and implementing new technical capabilities, making sure that YBP and an ILS vendor’s electronic systems are in sync.

In a personal email message dated 11 March 2003, Breaux outlined the steps YBP follows in setting up services with a new system.

“We first figure out our primary contact at the systems vendor (not as straightforward as it might sound!). Then we get written specifications from the integrated library system vendor. We look for specific things. How are multiple subaccounts handled? Can the library transmit fund codes? How about notes to vendor? Can they send an order that does not contain an ISBN? How will the orders be transmitted? What does the library need to understand about setting up the service on their end? Etc. If possible, we try to get the system vendor to send us a sample file or two, so that we can work out the worst of the kinks before involving a customer.

“Then we look for a suitable customer to partner with for testing. We generally like a large, but not-too-complicated customer, with a capable acquisitions and systems staff, which has patience for what can be a drawn-out testing process. We’ll sometimes work with the ILS vendor to identify a mutual customer who is also a beta site for the ILS vendor. Other times, we just scan our customer list to find suitable test partners and approach them. And sometimes a test partner will appear when a customer approaches us about developing support for a new service.

“Then we start trying to exchange files with the customer. Usually, when developing a new service, it takes many back and forths [sic] until all 3 parties (YBP, the customer, the system vendor) are satisfied.”

As of 2003, YBP can process electronic orders in several standards, including BISAC, X12...
and EDIFACT. At Jackson Library, work-arounds have made it possible to do EDI invoicing with YBP in the DRA system. With local library programming, YBP can interface with SIRSI for a number of functions:

- EDI ordering
- generating pre-order records for titles ordered on GOBI
- loading cataloging records into SIRSI from YBP or PromptCat
- loading bibliographic records for approvals to create order records

According to Breaux, YBP is working with SIRSI to support X12 invoicing.

**Book and Serials Suppliers That Support EDI**

EDI provides a standard procedure that can be used with many vendors. However, every book or serials vendor uses its own homegrown system to interface with its customers.

Obviously, not all vendors or integrated library systems can support EDI, and those that do support EDI have implemented it in different ways and to various degrees. Some may be capable of supporting ordering but not invoicing. Some may support the X12 standard but not EDIFACT.

In March 2003 we questioned several book vendors and serials subscription agents, by phone and email, to see if they could provide EDI interfaces with either DRA or SIRSI, for ordering and invoicing.

There was no response at all from one vendor. A sales representative from another said, very glibly, that their capacity to interface with DRA is "under development." Of course, this is just another way of saying that the vendor does not do EDI! An EBSCO sales manager said, "We do EDI invoicing with the ILS [vendors] that can do EDI invoicing." In a personal email message on 6 March 2003, Franklin Book Company's Director of Sales and Marketing reported that his company "has EDI protocols in place that should work with any system using BISAC or EDIFACT interfaces."

The most detailed response came in a telephone conversation on 7 March 2003 with the Director of Product Development for Harrassowitz North American Library Services. This person said that Harrassowitz has had less success in interfacing with DRA and SIRSI than with any other ILS vendors. Apparently only a dozen Harrassowitz library customers are using EDI at all. The libraries of Brigham Young University and Stanford University were cited as praiseworthy examples of EDI functionality. Note that Brigham Young University's library uses a SIRSI system, so it must be possible to overcome the interfacing problems Harrassowitz has experienced with SIRSI.

Harrassowitz does EDI invoicing with three of its library customers, and can support serials claiming and monographic ordering. The company is capable of providing MARC records and X12 invoices. They prefer the EDIFACT standard over the X12 standard, and the contact person described EDIFACT as being "more modern and flexible" as well as being recognized worldwide. Our contact said that EDIFACT reflects ILS vendors' target marketplace, and that any ILS vendor that wants to do business outside of North America needs to adopt EDIFACT.

The Harrassowitz contact described SIRSI as being "on the verge" of providing a full range of EDI services, but added "development has been slow." SIRSI uses the X12 standard, and that makes working with SIRSI less attractive to Harrassowitz. Most Harrassowitz library customers that use EDI have Voyager or Innovative Interfaces (III) systems, and the contact person felt that the Voyager system provided the best EDI functionality. When we briefly described what Jackson Library does with YBP, we were assured that Harrassowitz could provide the same service, even with a DRA or SIRSI system. The Harrassowitz contact said, continued on page 84
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“We piggyback on YBP. What YBP does, Harrassowitz usually does later.”

In a telephone phone conversation on 7 March 2003 with Baker & Taylor Product Support, we learned that Baker & Taylor interfaces with DRA Classic for EDI purchase orders and vendor acknowledgement of orders, but not for invoicing. We were told that SIRSI does not want book vendors to do any further development of EDI functions with DRA Classic, because the DRA Classic system will no longer be supported by SIRSI. Baker & Taylor supports EDI ordering with SIRSI’s Unicorn, but vendor acknowledgement procedures and EDI invoicing still are under development.

An Electronic Services Consultant with Blackwell Books reported by email on 6 March 2003 that Blackwell interfaces with DRA Classic for EDI purchase orders and to receive ANSI X12 EDI orders and to provide ANSI X12 EDI invoices. At that time Blackwell was testing ANSI X12 EDI ordering and invoicing with SIRSI. It was Blackwell’s understanding that SIRSI was not yet offering EDI ordering and invoicing, but would include these features in a general release of their software pending completion of testing with suppliers.

Interestingly, no vendor we contacted mentioned using or testing the newer XML standard for EDI.

EDI and SIRSI:
What is Currently Available
Clearly, SIRSI’s EDI capability is at different stages of development with different vendors. In a set of written responses to questions submitted by Jackson Library in June 2002, SIRSI sales representative Mary Miller wrote, “We’re currently testing ‘in-house’ with Blackwell, Yankee [i.e., YBP], Ingram and Brodart. We’re testing all formats where the vendor will support them – meaning, purchase order, purchase order acknowledgement and invoices. EBSCO invoicing is a high priority but has not been tested yet.” In the same document, Miller said that SIRSI was testing what she called the “needed vendors” as libraries set up EDI with their SIRSI systems.

At the SIRSI User Group meeting held in June 2002 as part of the NASIG 2002 Conference, SIRSI representatives Cathy Jones and Chuck Leachman were questioned concerning their company’s work on X12 ordering and claiming. They said that serials claiming with EBSCO was operational. They added that SIRSI was purposely starting out with a few vendors to work out X12 mapping and plans to add others once details are tested, configured and released.

In a live demonstration of SIRSI’s Unicorn to Jackson Library staff at the University of North Carolina at Greensboro on September 8, 2002, Mary Miller pointed out that the vendor files in the system provide for inclusion of X12 addresses. Miller said that development of EDI capabilities was part of SIRSI’s “primary focus.”

A document on SIRSI’s customer Website, “Unicorn 2003 Key Enhancements: Flexible MARC (9XX) Order Loading”, retrieved on 15 November 2002, reported that “orders can either be generated in the typical manner using reports, or an X12 book ordering and invoicing relationship may be developed with the vendor.”

What We Would Like as a Prospective Customer
What would Jackson Library’s “dream” EDI system look like, if we could have it? How would it work?

We would prefer an EDI process with a shorter and more straightforward series of computer commands and responses. Presently, the Approval Plan Coordinator has two and a half types pages listing commands to enter at the various stages of the EDI procedure. This list is the outcome of various work-arounds that were necessary to make EDI function with DRA Classic. At one point the computer responds discouragingly, “System cannot find the file specified.” The staff person’s instructions read “Ignore this and continue.” During the invoice approval stage a window appears with a very cryptic message, “Order records matching location record for 010119 and AKT-0209 not found.” This message appears every time, and it can also be ignored completely.

We would like the vendor to supply full bibliographic records at no additional charge, rather than the brief, non-standard records now received with YBP approval shipments.

We would like to be able to set up more than one account number at a time in supplier files.

We would like EDI software that would allow orders without ISBNs to be transmitted, since not every bibliographic record has an ISBN. When there are several ISBNs in a record, we need to be able to specify the one we want in the order.

We would like an EDI process that would assign DBCNs (database control numbers) to the records we import. It took a work-around to make this possible with DRA Classic.

Conclusion
A librarian in the Serials Department of the American University Library posted the following item to the electronic discussion list SERIALST:

“Sept. 2000 marks the sixth year that I will be keying. BY HAND, the invoice into our otherwise integrated library system. Has any one contacted [this vendor] about their lack of a disk or EDI format for exchanging invoice data? I call them every year and get, ‘We are working on that. Our current system can not do it.’

Now they have a new system that they think will one day be able to handle it. Perhaps those of you who have large accounts with [this vendor] could call your customer service rep and ask when they expect to offer EDI invoicing. Let them know how much you want that ability. Point out that many other vendors have been providing it throughout the 1990s and make sure they pass your questions on to someone higher up.

‘We need more than one squeaky wheel.’

Call today.

Evidently there is a real need in libraries for EDI and its efficiency, but book and serials vendors must have libraries’ EDI needs explained to them. One way to do this is to invite vendors to library conferences and to ILS user group meetings. Another is to question vendors’ customer service representatives and sales representatives about their companies’ EDI capabilities, and to make it clear that their customers will be better served if EDI procedures can be developed and used. Tell vendors that competitive quotes can no longer be evaluated dollar for dollar. Libraries must also consider the cost of dealing with the vendor, and that cost may be significantly higher if the vendor cannot use EDI.

Selected Resources on EDI
Archives of electronic discussion lists:

A vendor’s Website:

A publishing industry site:
The Book Industry Study Group (BISG) Web site is a place to look for information and new developments regarding EDI. The site can be found at http://www.bisg.org/

For an annotated list of additional Web resources see:

Journal articles:

List of Works Cited