Discover how to use the EDI protocol to automatically email orders in OLIB Acquisitions.

Overview

OLIB acquisitions can be used for the automatic emailing of orders using the EDI protocol. Once enabled, the workflow is slightly different from other orders that go from Pre-Order to Outstanding: with EDI they progress from Pre-Order to Authorised. The background process then moves the status on to Outstanding once the order is sent. The following lists the configuration necessary, however Technical assistance may be required from OCLC Support to ensure correct set up.

From OLIB 9 Service Pack 8 OLIB calls a PL/SQL package for the EDI processing. This replaces the EDI Driver server process, that used to be enabled in System Admin> Server Process Config.

EDI details on the Supplier record

EDI is enabled on a supplier-by-supplier basis. Enter the following settings in the supplier record to enable EDI transmission:

- **Email Address for Orders** - Enter the email address to which EDI orders should be sent. Your supplier will provide this address, e.g. olib@dawsonbooks.co.uk.
  
  Note: EDI Email Address is no longer used for this data. Once OLIB 9 Service Pack 8 is installed, check that the email address is correctly set in Email Address for Orders.

- **EDI** - This is a Yes/No flag. If it is set to Yes, any orders which are authorised against this supplier will be transmitted to the supplier via email using the EDI protocol.

- **Email Address for Claims** - This field is not yet implemented.

- **Email Address for Orders** - Enter the email address to which any email correspondence should be sent from the supplier relating to orders transmitted via EDI. Any replies from the supplier or error reports from any email system will be directed to this email address. This can be an individual or group email address, e.g. acquisitions@myorg.org.uk.

- **EDI CC Address / EDI BCC Address** - Enter an email address in these fields if you would like a library member of staff to receive email copies of orders sent.

- **EDI Email Subject** - Enter the text which the system should include on the Subject line of any orders emailed to the supplier using the EDI protocol. Your supplier will supply this information to you. This is a mandatory field. The email EDI message will not be sent to the supplier if the supplier’s EDI Email Subject field is not completed. If the supplier does not have a recommended text for emailed EDI orders, it is recommended that you enter OLIB EDI Order or similar as the EDI Email Subject.

- **EDI Party ID Code** - Enter the unique code agreed between the library and the supplier. This is a required data element in an EDI order. Refer directly to the supplier to ascertain what to enter in this field. If you have more than one location, see below.

https://help.oclc.org/Library_Management/OLIB/Acquisitions/Set_up_Acquisitions/EDI_set_up

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Location specific EDI party ID codes

If you have multiple locations, you can enter different party ID codes for each Location for the same Supplier. This allows the same supplier to be aware that the orders are from different Locations and should be delivered to those Locations. If the User who is placing the order has a location specific party ID code then that is used when placing the order; if they do not then the above default EDI Party ID Code is used.

1. In Acquisitions Reference Data> Suppliers/Publishers find the relevant Supplier.
2. Use the drop-down list to select the relevant Location.
3. In Party ID Code enter the unique code agreed between the library location and the supplier. Click >> to add it and display in the fields below.
4. Repeat for any other Locations and save the details.

If in future you need to remove a location's party ID code, tick the box of the Location and Party ID code displayed, and from Actions select Delete location-specific setting.

ArtEmail address

Set the ARTEmail Prefix if required for British Library ordering:

1. Go to System Administration> Miscellaneous Defaults.
2. Enter the value in ARTEmail Prefix and save the changes.

When this is not set, OLIB sends ‘XXXXX’ as the Sender ID in the Header-UNB-Sender ID field.

Delivery address details

This address information is connected to the logged in User who is to place the orders. An Address Type of O must be associated with that User's Location, or with that User's own User record. If the address of Type O exists in the User's own User record, this takes precedence over the one in the Location record; if the O type address does NOT exist in the User's record, the one in the User's Location record will be used instead.

Set an address of type O in User record

1. Go to the User record of the user placing EDI orders.
2. In modify mode, in Address click Add.
3. This delivery address must have an Address Type of O. The EDI order message includes the data entered in the House Name, Street, PO Box, District, Postal Town, Country and Postcode fields of the delivery address.
4. Save the address details.
5. Set the Location field on the logged in user record to be the location to which the items are to be delivered.
Set an address of type O in User's Location record

1. In Locations find the Location of the User who will place EDI orders.
2. Check that in the Location Details, there is an Address of type O for Order which is where new stock is to be delivered.
3. If not, modify record to create a new address of type O or alternatively change an existing address to type O (in modify mode, tick the Addresses box and in Actions select Change address type.

ISO currency codes

The Edifact standard, around which OLIB's EDI facility has been modelled, stipulates that ISO currency codes should be used when specifying the currency in an EDI message. In OLIB, the currency record's Key ID is included as the currency code in an EDI message. You should therefore ensure that the default currency for an EDI supplier in OLIB is one of the currencies which has an ISO currency code in the Key ID field, e.g. Pound Sterling, Key ID GBP.

1. In the Suppliers domain, access the Edifact supplier record.
2. In the Details page select the relevant Currency from the drop-down list.

If you do not set a default currency for your suppliers, the currency will have to be set when entering the order. Again, you should ensure that you use a currency with an ISO code in the Key ID field.

Order processing

Once enabled, the operation of EDI orders is almost identical to non-EDI orders. You can also re-transmit the order if it fails on the first attempt.

View EDI messages