Send your vendor an EDIFACT serial issue claim

Overview

When making a serial issue claim in WorldShare Acquisitions, you can notify the vendor of your claim by sending them an EDIFACT serial issue claim message using secure FTP (SFTP or FTPS) or email.

- Vendors may prefer to receive EDIFACT serial issue claims via secure FTP as it can decrease processing times.
- EDIFACT serial issue claims received via email will have the content in the body of the email and as an attachment.

You must follow the instructions below before using either EDIFACT serial issue claiming messaging method. You have to:

- Configure settings for every vendor you plan on notifying.
- Access OCLC Service Configuration in order to configure EDIFACT serial issue claims using email. For information on creating an account, see Signing In.

Step 1: Contact your vendor

Before you begin configuration, you must contact the vendor in order to determine the correct EDIFACT notification settings:

- The vendor will provide what to put in the UNB Vendor Identifier and NAD Vendor Identifier fields.
- The vendor may also have recommendations for how your library should identify itself in the UNB Library Identifier and NAD Library Identifier fields. The vendor may require certain identifier types to be used, or they may provide you with the options they support.
- For secure FTP messages, ask the vendor for their secure FTP information for dropping off messages.
- For email messages, ask the vendor which email contact the message should be sent to.
- It is your library’s responsibility to have a conversation with the vendor about your library identifier. If you hit a roadblock in the process, contact OCLC Support.

Step 2: Configure your vendor

The following workflow applies to sending serial issue claims via both email and secure FTP. Steps that only apply to one order delivery method are identified.
1. On the left navigation, click **Vendors**.
2. Search for the vendor you want to configure for the EDIFACT notification method.
3. From the vendor search results, click the **Vendor Name**.
4. (Secure FTP messages only) In the vendor record, click the **Links & Logins** accordion.
   a. Click **Add New Link**.
   b. Complete the following fields for the secure FTP link.
      - **Link Name** - Enter a **descriptive name** for the link (e.g., FTP account for EDIFACT claims).
      - **URL** - Enter the **URL** of your vendor’s FTP site. The URL must start with sftp:// or ftps://.
      - **Type** - Select **SFTP** or **FTPS** from the drop-down list.
      - **User ID** - Enter the **username** provided by the vendor for the secure FTP account.
      - **Password** - Enter the **password** provided by the vendor for the secure FTP account.
      - **Directory** - Enter the **directory or folder** where EDIFACT serial issue claims should go.
        - **Top-level folders** do not require a beginning slash (e.g. claims not /claims).
        - **Sub-folders** require a slash (e.g., incoming/claim).
   c. Click **Save**.
5. In the vendor record, click the **Acquisitions Settings** accordion.
   a. In the Specific Notification Settings fields, set the following:
      - For secure FTP serial issue claim messages:
        1. In the **Action** list, select **Claiming serial issues**.
        2. In the Delivery Method list, select **FTP (EDIFACT)**.
        3. In the FTP Profile list, select the profile you created in step 1.
      - For email serial issue claim messages:
        1. In the **Action** list, select **Claiming serial issues**.
        2. In the **Contact** list, select your **vendor contact** who will be receiving the email. You can add contacts in the Vendors section of the vendor record.
        3. In the Delivery Method list, select **E-Mail (EDIFACT)**.
        4. Click **Save**.
   b. In the Edifact Notification Settings fields, use the lists to select the type of identifiers provided to you by your vendor. You must select a value for all four fields:
      1. **Depending on what you select for UNB Vendor Identifier and NAD Vendor Identifier, your next steps will vary.**

<table>
<thead>
<tr>
<th>IDENTIFIER TYPE</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAN</td>
<td>1. Click the <strong>Identifiers</strong> accordion.&lt;br&gt;2. In the <strong>SAN</strong> field, enter the <strong>vendor identifier</strong>.</td>
</tr>
</tbody>
</table>
### IDENTIFIER TYPE

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click the Identifiers accordion.</td>
</tr>
<tr>
<td>2. In the Additional Identifiers Type list, select GLN Global Number or ISIL International Standard for Libraries.</td>
</tr>
<tr>
<td>3. In the Value field, enter the vendor identifier.</td>
</tr>
</tbody>
</table>

### Local Vendor ID

The Local Vendor Number is assigned by the system. To view your vendor number, click the Local Identifiers accordion.

### Vendor-supplied ID or Library-supplied ID

Enter the identifier in the text field that appears on the right.

2. Depending on what you select for UNB Library Identifier and NAD Library Identifier, your next steps will vary.

### IDENTIFIER TYPE

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>See Step 3: Add library identifiers in OCLC Service Configuration.</td>
</tr>
</tbody>
</table>

### WorldCat Registry ID

The WorldCat Registry ID is an identifier in the form of a running number which is assigned to all libraries and other cultural institutions within the WorldCat Registry. To view your WorldCat Registry ID, log into OCLC Service Configuration, and click WorldCat Registry > Identifiers.

### Vendor-supplied ID or Library-supplied ID

Enter the identifier in the text field that appears on the right.

6. Click **Save**.

7. If you selected SAN, GLIN, or ISIL for your UNB Library Identifier or NAD Library Identifier, continue to the next step to configure your library identifier. Otherwise you can begin making serial issue claims using EDIFACT messages (see Step 4: Claim serial issues).

### Step 3: Add library identifiers to OCLC Service Configuration

If your UNB Library Identifier or NAD Library Identifier is a SAN, GLN, or ISIL, you must configure your library identification in OCLC Service Configuration.
1. Sign in to Service Configuration.
2. On the left navigation, click **WorldCat Registry > Identifiers**.
3. Select your **Identifier Type** from the list.
4. Enter your **Identifier** in the text field.
5. Click **Add**.
6. Click **Save**.
7. You can begin using the EDIFACT email method.

### Step 4: Claim serial issue(s)

1. Search for missing issues and select the **check boxes** next to the issues you want to claim. See [Search and filter missing serial issues](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Vendors/Send_your_vendor_an_EDIFACT_s...) for details.
2. At the top of the screen, click **Claim**.
3. Select the **Notify vendor about this claim** check box.
4. Click **Continue**.
   - If a single vendor is related to the selected issues, the vendor will be pre-filled for you automatically based on the most recent subscription order item in Acquisitions. Email or printed claims can be used to notify a single vendor.
     - **Note:** If either of the below is missing, you will receive an error message.
       - There must be a valid email address for the vendor if sending by email.
       - If any of the issues do not have a vendor, you will not be able to submit the claim message to the vendor.
   - If multiple vendors are related to the selected issues, this will be indicated in the dialog. Email is the required method for notifying multiple vendors.
     - **Note:** If either of the below is missing, you will receive an error message.
       - There must be a valid email address for every vendor.
       - If any of the issues do not have a vendor, you will not be able to submit the claim message to the vendors.
5. **If you selected FTP (EDIFACT) as the method:**
   a. **(Optional)** Select the **Preview message before sending** check box to view the message before sending it to the vendor.
   b. Select the desired FTP Profile.
   c. **Send Claim**.
6. **If you selected E-Mail (EDIFACT) as the method:**
   a. **(Optional)** Select the **Preview message before sending** check box to view the message before sending it to the vendor.
   b. **Send Claim**.
7. A confirmation message appears and the items have been claimed in the system.