

## ACQUISITIONS AND EDIFACT

### Introduction

In May 2010, the Library at Buckinghamshire New University (Bucks) embarked on an ambitious project to overhaul its acquisitions workflow by automating processes and introducing shelf-ready supply<sup>1</sup>. This was a symptomatic response to a reduction in staff,

1 Roker, B. & Williams, C., 'Achieving more with less: acquisitions in hard times', *SCONUL Focus* 52, 2011, pp 34-38

campus consolidation, budgetary constraints and an outdated acquisitions workflow that needed to catch up with a changed workplace. This is a very familiar scenario that many higher education institutions have had to face. As we investigated shelf-ready acquisitions and looked at acquisitions developments achieved by other higher education institutions, we realised that the options available to achieve our goal and deliver improvements were many and that we would need to make decisions on which course to take.

### 9xx versus EDIFACT

We began by looking at 9xx ordering which is a US-based standard. This ordering method allows libraries to create orders on a vendor's website which are then loaded into the library management system by the 9xx ordering programs with the order data embedded in the MARC record. It's a tried and trusted method of placing orders supported by the major UK book suppliers. However, it's not an Electronic Data Interchange (EDI) standard. We knew that 9xx ordering would streamline our workflow and deliver improvements but the cost of purchasing the additional software module from Sirsi Dynix proved prohibitive for us at the time. So we turned our attention to the Electronic Data Interchange for Administration, Commerce and Transport (EDIFACT).

### EDIFACT wins

A visit to Brunel University in August 2010, proved useful in showing us how the quotes method of ordering, supported by the EDIFACT standard, would also enable us to streamline our acquisitions workflow. Most importantly, this could be achieved without needing to purchase additional software as our library management system, Sirsi Dynix's Symphony, already had the reports that would run the EDIFACT messages to manage the communication of bibliographic order data between book suppliers and Bucks. Financial constraints coupled with the need to maximise resources we already had led us to opt for quotes ordering using EDIFACT. With the appointment of our Systems and Research Librarian, Elizabeth Chamberlain, a month earlier, so started a closer look at Sirsi Dynix's EDIFACT user guide and the reports that would need setting up to run behind the scenes to achieve the acquisitions workflow we desperately needed. We had been sending orders via EDI to vendors for more than 7 years but now needed the additional messages for bibliographic order data to flow seamlessly between the vendor website and

our library management system. For the whole process to work, we also partnered Dawson Books and Sirsi Dynix in some developmental work to enable quotes ordering with them using the EDIFACT standard.

#### EDIFACT Reports

So for the past 18 months, we have been running a suite of timed reports in Symphony which turn quotes or proposal orders on the book suppliers' websites into firm orders. Once the proposal orders or quotes are placed on the vendors' bibliographic databases, a file of these is made ready for our EDIFACT reports to pick up. We run the EDIFACT file ftp retrieval and EDIFACT file receiving reports to collect the order files and arrange the proposals by vendor. Then the EDIFACT book quotes report converts the quotes into order data in Symphony giving the orders system-generated order numbers. These orders now have bibliographic data, holding codes, funds, quantities and in-house classmark notifications. We run these 3 reports in quick succession twice daily at 8.20am and 3.25pm. The EDIFACT standard presents all this bibliographic order data in a specific way ready to send back to the vendors as firm orders.

#### LOADED BIB RECORD

020: |a0071411712

100: |aNadel, Barbara A

245: |aBuilding security : handbook for architectural planning and design:|nc2004

250: |a1

260: |aNew York, NY :|bMcGraw-Hill,|c2004

999: |hHWBK7D FORM=LDORDER .ORDR\_ID. |aBNU-2200499  
.VEND\_ID. |aCOUINSEDI .ORDR\_LIBR. |aWYCOMBE .FISCAL\_CYCLE.  
|a2011 .ORDR\_TYPE. |aFIRM .LINE\_ITEM\_BEGIN.

.LINE\_ITEM\_ID. |a164566-1001 .LINE\_TITLEID. |a9780071411714  
.LINE\_VEND\_CURR. |aSTERLING .LINE\_UNIT\_PRICE. |a65.00  
.LINE\_COPIES. |a2 .LINE\_XINFO\_BEGIN. .QLI. |aOA4031347/001/033  
.NOTE. |a\*690.22 NAD\* nis .LINE\_XINFO\_END. .LINE\_ITEM\_END.  
.FUND\_SEGMENT\_BEGIN. .LINE\_FUND\_ID. |aBKSEC  
.LINE\_FUND\_COPIES. |a2 .FUND\_SEGMENT\_END.  
.DIST\_SEGMENT\_BEGIN. .HOLDING\_CODE. |aHWBK7D  
.LINE\_DIST\_COPIES. |a2 .DIST\_SEGMENT\_END.

EDIFACT book quotes report lists all loaded bibliographic records and order data. The standard also supports notes fields so specific information such as special classmark requirements can be sent back to the vendors in the firm EDI order. MARC record and classmark requirements are sent as a Note in the order record to the vendor.

**We run the EDIFACT file transmission report daily at 10pm which picks up all firm orders made ready that day and sends them by EDI to the vendors.**

#### **EDIFACT Book Orders and Beyond**

**Phase 2 of our acquisitions project has seen the automation of invoicing and order responses using the EDIFACT standard. We no longer manually input invoices into Symphony for payment or update order records with status reports. Invoices from vendors are now picked up and loaded into Symphony using the EDIFACT book invoices report. The invoices are then ready for review and then payment. In a similar way, files of order response reports are picked up by the EDIFACT book orders report and display as status reports in the relevant orders. The automatic updating of outstanding orders with their new order status has saved time and manual input.**

**We have one final piece of EDIFACT message work outstanding which will then see the completion of phase 2 and our acquisitions project. We are currently working with our Southern Universities Purchasing Consortium (SUPC) book suppliers to deliver automatic receipt and loading of book orders. We anticipate that this EDIFACT message will save time as we currently manually receipt and load every book and will impact on both our Acquisitions and Cataloguing teams. New acquisitions will arrive with their orders already received on Symphony and with item barcodes loaded.**

#### **Conclusion**

**The success of our acquisitions project to automate our acquisitions workflow and introduce shelf-ready supply has been achieved by a number of inter-related factors. We owe the benefits of our automated processes to the co-operation of our book suppliers, the technical expertise of key individuals at Bucks, Sirsi Dynix and our book suppliers and the combination of the right people being in the right place at the right time and asking each other the right questions. EDIFACT, as the underlying standard, has also enabled us to achieve the tall order of overhauling our entire acquisitions process without needing to invest additional monies. The careful timing and sequence of these EDIFACT reports has enabled us to maximise our technical and human resources at Bucks, which at a time of continuing economic constraint, has been very beneficial.**

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