
Basic EDI Overview

- **Product:** Voyager
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Description

Basic Electronic Data Interchange (EDI) Overview

Resolution

Electronic **Data Interchange** is used in Library Acquisitions environments to exchange information about Purchase Orders, Invoices, and Serials Claims with vendors. Libraries may choose to do one or all of these communications processes. Participating vendors may or may not be able to perform all processes.

EDI can help process orders, claims, and invoices with *certified* vendors (see [EDI Certification Process for Vendor Partners](#) for the list of certified vendors).

For each vendor, you will need to configure an EDI profile in the Acquisitions client. If you have more than one account with the vendor you must have a vendor record for each account.

Vendors usually have documentation for set up. You must consult with your vendor to obtain the information required to set up vendor records and connection profiles in Voyager.

Once the details are confirmed with your vendor, and you have set up your vendor record and connection profile, you can immediately begin using EDI.

It is prudent to do tests, first, with your vendor. Test files usually contain just a few records and should be available from your vendor upon request.

You will use FTP to transfer EDI data files to and from the vendor and your Voyager server.

- For incoming EDI, once the file is in place on the server, open Acquisitions, then receive and load the file. Log files report any exceptions.
- For outbound EDI, choose to send POs or claim via EDI and process your outbound messages through Acquisitions. The output file is immediately available for transfer to the vendor.

Once incoming or outgoing EDI files have been processed, you may delete the files from the server and your local PC, according to local best practices.

Additional Information

See the "Electronic Data Interchange" chapter in the [Acquisitions User's Guide](#), which explains EDI setup and processing in Voyager.

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