Discover how to notify a vendor of various workflows by sending them an EDIFACT message using email or secure FTP in WorldShare Acquisitions.

Overview

When completing certain actions in WorldShare Acquisitions you can notify the vendor by sending them an EDIFACT message using secure FTP (SFTP or FTPS) or email.

- Vendors may prefer to receive EDIFACT messages via secure FTP as it can decrease order processing times.
- EDIFACT orders 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 messaging method. You have to:

- Configure settings for every vendor you plan on notifying.
- Access [OCLC Service Configuration](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Vendors/Configure_EDIFACT_messages_for...) in order to configure EDIFACT messages using email. For information on creating an account, see Signing In.

Once your settings are configured, you can send an EDIFACT message to a vendor when taking the following actions:

- [Placing an order](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Vendors/Configure_EDIFACT_messages_for...)
- [Making an order item claim](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Vendors/Configure_EDIFACT_messages_for...)
- [Making a serial issues claim](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Vendors/Configure_EDIFACT_messages_for...)

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](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Vendors/Configure_EDIFACT_messages_for...).
Step 2: Configure your vendor

The following workflow applies to sending EDIFACT messages via both email and secure FTP. Steps that only apply to one 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 messages 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 in the upper right corner.
5. In the vendor record, click the Acquisitions Settings accordion.
   a. In the Specific Notification Settings fields, set the following:
      ▪ For secure FTP messages:
         1. In the Action list, select the type of EDIFACT messages you would like to set up with your vendor.
            ▪ Ordering
            ▪ Claiming order item(s)
            ▪ 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 messages:
         1. In the Action list, select the type of EDIFACT messages you would like to set up with your vendor.
            ▪ Ordering
            ▪ Claiming order item(s)
            ▪ 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 Identifiers accordion.</td>
</tr>
<tr>
<td></td>
<td>2. In the SAN field, enter the vendor identifier.</td>
</tr>
<tr>
<td>GLN or ISIL</td>
<td>1. Click the Identifiers accordion.</td>
</tr>
<tr>
<td></td>
<td>2. In the Additional Identifiers Type list, select GLN Global Number or ISIL International Standard for Libraries.</td>
</tr>
<tr>
<td></td>
<td>3. In the Value field, enter the vendor identifier.</td>
</tr>
<tr>
<td>Local Vendor ID</td>
<td>The Local Vendor Number is assigned by the system. To view your vendor number, click the Local Identifiers accordion.</td>
</tr>
<tr>
<td>Vendor-supplied ID or Library-supplied ID</td>
<td>Enter the identifier in the text field that appears on the right.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>IDENTIFIER TYPE</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAN, GLN, or ISIL</td>
<td>See Step 3: Add library identifiers in OCLC Service Configuration.</td>
</tr>
<tr>
<td>WorldCat Registry ID</td>
<td>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 &gt; Identifiers.</td>
</tr>
<tr>
<td>Vendor-supplied ID or Library-supplied ID</td>
<td>Enter the identifier in the text field that appears on the right.</td>
</tr>
</tbody>
</table>

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 using EDIFACT messages.

**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.