Guidelines for use of EDItX documents in Danish libraries

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1. Introduction

These guidelines describe the use of EDItX documents to exchange information as orders etc. between libraries and vendors of library materials in Denmark.

These guidelines are part of a series of specifications for technical interoperability between libraries and between libraries and partners called "danZIG specifications". The danZIG is a committee representing library system vendors, library technical interoperability consultants and national library services supplemented by libraries representatives put together by Danish Agency for Libraries and Media and chaired by the agency. The purpose of danZIG is to advise the governmental agency Danish Agency for Libraries and Media, which have the responsibility for the published specifications.

The target group for these specifications is vendors to Danish libraries and people interested in technical interoperability in the library sector.

In 1998-99 a set of Danish XML schemas was made based on EDItEUR's EDI transactions – the danEDItEUR specifications. Of these schemas only the order was used. Later EDItEUR created EDItX as an XML substitution of the EDI-specifications and danZIG recommended to migrate from danEDItEUR specifications to EDItX.

These guidelines are made by the danZIG working group for purchasing lending materials (danZIG materialeanskaffelsesarbejdsgruppe).

As EDItEUR do not specify a protocol for transport, this is not defined in these guidelines. This issue will be part of future work for danZIG.

2. Scope

The document gives guidelines for using EDItX XML-documents for ordering (elektronisk bestilling) and ship notice (elektronisk følgeseddel).

The EDItX XML-documents offers a variety of ways to create an order and a ship notice. As a rule all options may be used if it is has meaning. The purpose of the guidelines is to clarify and to relate to the Danish environment.

3. State of EDItX schemas

EDItX describes a number of XML documents for use in the book trade.

- STOCK ENQUIRY & RESPONSE / STATUS REPORT
- GENERAL BOOK TRADE ORDER FORMAT
- ORDER RESPONSE / STATUS REPORT
- ORDER STATUS ENQUIRY AND ORDER CANCELATION
- SHIP NOTICE / DESPATCH ADVICE FORMAT FOR GENERAL BOOK TRADE USE
- RETURNS NOTIFICATION / AUTHORIZATION REQUEST
- RETURNS RESPONSE

Two of these exist in a library version:

- BOOK ORDER FORMAT FOR LIBRARY SUPPLY
- SHIP NOTICE / ORDER FULFILMENT FORMAT FOR LIBRARY SUPPLY

The DanZIG working group for library acquisition has commented on these schemas. The working group had seven minor requests for change to the schema. All are provided for in the latest version.

The schemas are published by EDItEUR:

http://www.editeur.org/

4. State of guidelines

This version is based on

- BOOK ORDER FORMAT FOR LIBRARY SUPPLY, version 1.2
- SHIP NOTICE / ORDER FULFILMENT FORMAT FOR LIBRARY SUPPLY, version 1.0.

5. Maintenance

With the variety of options offered, only a small subset has been considered. If problems or questions arise when the standard is implemented, they will be handled in danZIG.

Annex A.

BOOK ORDER FORMAT FOR LIBRARY SUPPLY

A1. General

Even though the format is named "book order" it is used for ordering all kind of materials, books, CD's etc. The only exception is serials.

To get a total view of fields the EDItX document must be examined.

A2. Header

This element contains information of the order as a whole, i.e. order number, date and time, currency, identification of the buyer and the vendor, shipping and billing instructions etc.

OrderTypeCode

The value ApprovalOrder is used for ordering copies for inspection (gennemsynseksemplar).

The general rule is to specify copies for inspection at this level, but it is also possible to specify on copy level (CopyDetail.ProcessingProfileCode).

BuyerParty

The general rule is to use VendorAssignedID.

SellerParty

The general rule is to use BuyerAssignedID.

CataloguingInstructions

The list of values for CatalogingFormatCode includes danMARCISO2709 (danMARC2 wrapped in ISO 2709) and danMARCXML (danMARC2 wrapped in XML - ISO 25577 MarcXchange).

A3. ItemDetail (Line item detail)

This element corresponds to an order line. In each order line the specific article (book, CD etc.) and the number to be delivered is specified.

ProductID

The list of values for ProductIDType includes Proprietary, which may be used to refer to proprietary product numbers schemas.

ReferenceCoded

The list of values for ReferenceTypeCode includes LibraryNewTitleListReference, which may be used to address "bibliotekskatalogiseret materiale" (seddelfortegnelsernes afløser), e.g. bkm0824.

A4. CopyDetail (Copy detail)

This element corresponds to a sub line of an order line.

If for example five copies are ordered (ItemDetail.OrderQuantity = 5), they can be divided in subsets (e.g. two and three copies) with the same general properties.

CollectionProfile (Collection profile)

Covers information (profildata) on how a given object is accessed in the library, for example where it is placed and whether or not it may be lend out. The information may serve different purposes, e.g. updating the holdings register, presentation in the OPAC, print on label.

In Denmark the following CollectionCodes are used.

Collection Code	Meaning	Collection description (examples)
10	Filial (branch)	hovedbibliotek, filial, bogbus, depot
20	Hyldeliste	børn, voksen
30	Opstilling	musikafdeling, udlån
40	Delopstilling	billedbøger, musik, x-box, cd
50	Udlånsregel	til udlån, 14 dages udlån
60	Kassationskode	

FundDetail (Fund information)

Is used to specify bookkeeping information (konteringsoplysninger).

To be in consistence with OIO-invoice, it is recommended to use the same value for all sub lines within an order line.

ProcessingInstructionCode (Special processing / servicing instruction)

The following rules apply for assigning copy numbers (materialenumre).

If numbers shall not be assigned:

The library specifies ProcessingInstructionCode = NoAppliedCopyNumber.

If numbers is assigned by the library:

The library specifies ProcessingInstructionCode = AppliedCopyNumber, AppliedCopyNumberFrom or AppliedCopyNumberTo.

The library specifies the actual number or number interval in AppliedCopyNumber.

The supplier returns the same values in the ship notice.

If numbers is assigned by supplier:

The supplier returns the values in the ship notice, using ProcessingInstructionCode = AppliedCopyNumber, AppliedCopyNumberFrom or AppliedCopyNumberTo.

The supplier specifies the actual number or number interval in AppliedCopyNumber in the ship notice.

The library may specify temporary numbers in CopyNumber. If so the supplier must return the same values in CopyNumber in the ship notice.

Annex B

SHIP NOTICE / ORDER FULFILMENT FORMAT FOR LIBRARY SUPPLY

B.1 General

To get a total view of fields the EDItX document must be examined.

B2. Header

This element contains information of the ship notice as a whole, i.e. ship notice number, date and time, currency, identification of the buyer and the vendor, shipping and billing instructions etc.

A general rule is to repeat the information from the order.

B3. ItemDetail (Line item detail)

This element corresponds to a ship notice line.

In each ship notice line the specific article (book, CD etc.) and the number of delivered copies is specified.

A general rule is to repeat the information from the order.

B4. CopyDetail (Copy detail)

This element corresponds to a sub line of a ship notice line.

Generally this section mirrors the corresponding section in the order.

For copy numbers see Annex A.

B5.PackageDetail (Packaging Detail)

This element may be used for information on how the items are packed.

Annex C

Examples

C1. Slim order example

This XML document contains a very rudimentary order.

URL: http://biblstandard.dk/editx/examples/slim_order_example.xml

C2. Beefy order example

This XML document contains a more detailed order.

URL: http://biblstandard.dk/editx/examples/beefy_order_example.xml

C3. Slim ship notice example

This XML document contains a very slim ship notice.

URL: http://biblstandard.dk/editx/examples/slim_ship_notice_example.xml