


William S. Hein & Co., Inc.
INFORMATION SYSTEMS & TECHNOLOGY PROCEDURE

	Title: Guidelines for Voyager EDI Transmission Implementation	
	Author: W.S. Hein IST Department	
	Revised: October 26, 2004	Rev: 2

Overview

This document is designated for customers of William S. Hein & Co. desiring to process EDI transactions from Hein. In this document you will find information necessary for you to successfully setup EDI processing on your *Voyager Library Management System*. In addition, detailed information is provided on fields that are common to both of our systems. Lastly, a section outlining the implementation process is specified in the section titled *Implementation Steps*.

Note: Technical support people in Hein's Information Systems and Technology Department do have a thorough knowledge of EDI processing for the documents in which we are certified, but we do not possess support knowledge for the *Voyager Library Management System*. For more detailed information and technical support for your *Voyager Library Management System*, please consult your Voyager documentation manuals or contact your Voyager Customer Support Representative.


Data Points Required by Voyager to Establish EDI

The following table describes the data points that will be required to successfully establish EDI transmissions with Hein.

Table 1 - Voyager Data Points Table

Voyager Descriptor	Explanation	Comment
Location Envelope Address Code {enter in <i>EDI Connection Profile Maintenance</i> }	A unique code used to identify the library to Hein's system. These codes will use the :ZZ extension which tells the Voyager software that it has been mutually agreed upon between customer and vendor.	Hein will assign this code.
Vendor Envelope Address Code {enter in <i>EDI Connection Profile Maintenance</i> }	A unique code used to identify Hein as the vendor to the Voyager System.	Must be set to: WSHEIN:ZZ
PO Number	The Purchase Order Number supplied by the library.	Must be accurately captured in Hein's system for Match Points to work.
Vendor Title Number	An alphanumeric code for a title. This merely identifies a title in the Hein database.	Must be accurately captured in your Voyager system for Match Points to work properly. Hein uses a six character field; leading zeroes must be keyed (eg. 035660 not 35660)
Agent's Subscription Number (SNA)	A unique identifier assigned by Hein for each subscription.	Not currently used by Hein.
Publisher's Subscription Number (SNP)	A unique identifier assigned by the Publisher for each subscription.	Not currently used by Hein.
ISSN	ISSN	Not currently used by Hein.
Fund	The fund code assigned by the library.	Not currently used by Hein.

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Match Points

Match Points are data fields that will be used to match a unique line on a Hein Invoice to a unique line on your Purchase order. Hein uses PO Number and Vendor Title Number as the match point fields. The combination of these fields must be unique (i.e. you cannot have the same title number more than once on an individual Purchase Order). See the table above for more detailed information on these fields.

Other Considerations

1. EDI files will be placed on our server in a secured FTP directory specific for each customer. Specific instructions will be mailed out with the hard copy of the invoice letting the customer know how to access their EDI file.
2. Each invoice will contain no more than 100 line items. The number of line items was chosen based on the recommendation from Endeavor and requests from current customers using Voyager. The reduced size of each invoice will make it easier to search line items and improve access times within the Voyager software.
3. When an order is placed for a quantity greater than one, the customer has the option to give Hein multiple PO numbers that are associated with the order line. Example: if 2 different PO numbers are used to place an order for a quantity of 3 for the same *Hein Title Number*, both PO numbers and PO quantities must be entered into Hein's system to get the proper match (e.g. PO12345 qty. = 1 and PO98765 qty. = 2)
4. If you have multiple customer accounts set up with Hein, we cannot combine them into one EDI invoice.

Implementation Steps

1. Complete the form *Request for Voyager EDI Transmission*.
2. A representative from Hein will call the person listed as the *Primary Contact* to verify all necessary information is correct on Hein's system.
3. Hein will send you a report listing all current order information on our system. This will include your Purchase Order Number and Hein's Title Number.
4. You will enter Hein's Title Number into your Voyager system (see Voyager Data Points Table above for detailed information on Title Number).
5. Verify the accuracy of all of your Purchase Order Numbers listed on the report. Note any changes, additions or deletions on the report.
6. Return the report to Hein so that we can update the Hein system with your corrections.
7. You must create an *EDI Connection Profile* on your Voyager system. Use the *Location Envelope Address Code* and the *Vendor Envelope Address Code* supplied by Hein (see Voyager Data Points Table above for detailed information on these two fields).
8. You are now ready to receive and process EDI transmissions from Hein. You will continue to receive a paper copy of your invoice along with instructions on how to retrieve your EDI file from Hein's FTP Server.