

EDI

Evergreen is capable of EDI ordering and invoicing with vendors who offer it. EDI (Electronic Data Interchange) is the transfer of data from one computer system to another by standardized message formatting, without the need for human intervention. ([Source](#))

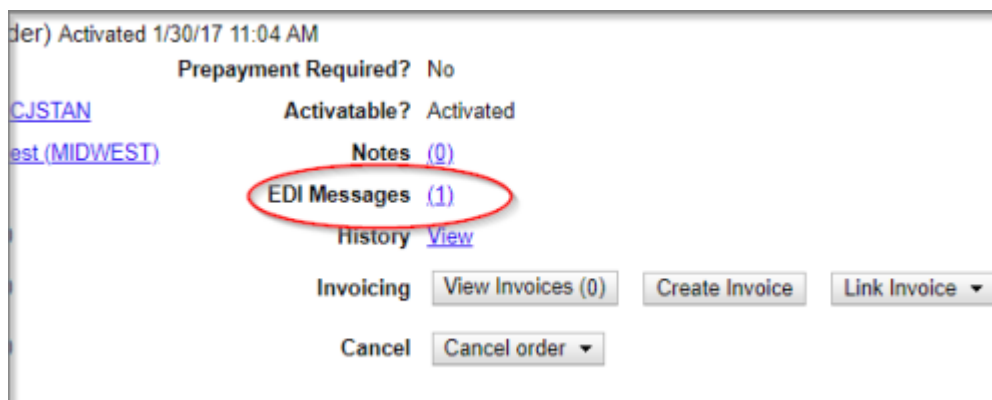
How EDI works with Evergreen

When you activate a purchase order that uses a provider who has been set up to use EDI, your order is bundled together and flagged. Every 30 minutes, an action-trigger process runs and prepares these orders to be pushed to the vendor's FTP site. A process called "the pusher" looks for these flagged orders and sends them to the vendor's waiting FTP site where the vendor grabs the order and it is officially "on order" with the vendor. Once the order has been pushed out to the vendor's FTP server, Evergreen creates an ORDERS message that is attached to the PO.

Three times a day, Evergreen runs another process called the "fetcher," which reaches out to the vendor's FTP server to see if there are any waiting messages. If there are, the fetcher downloads these messages in Evergreen and attaches them to the applicable POs. These include either ORDERS or INVOICES messages.

EDI Messages

EDI Messages are a part of the purchase order. The easiest place to locate them is in an individual purchase order, in the purchase order header.



You can also see all of your system's EDI messages by going to **Administration→Acquisitions Administration→EDI Messages**.

EDI Messages										
Back Next Filter										
✓ #	Purchase Order	Message Type	Status	Time Created	Time Translated	Time Processed	Time of Error	Error	EDI Account	Filename
1	1761-DC	INVOIC	processed	7/8/18 1:00 AM	7/8/18 1:00 AM				Brodart Unproc w BO WGRL	Out/07
2	1833-LS	INVOIC	processed	7/8/18 1:00 AM	7/8/18 1:00 AM				Brodart Unproc w BO WGRL	Out/07
3	1674-DR	INVOIC	processed	7/8/18 1:00 AM	7/8/18 1:00 AM				Brodart Unproc w BO WGRL	Out/07
4	1724-LS	INVOIC	processed	7/8/18 1:00 AM	7/8/18 1:00 AM				Brodart Unproc w BO	Out/07

Types of Messages

ORDERS

An ORDERS EDI message is created by Evergreen when a purchase order is successfully deposited onto the vendor's FTP server. This message should appear in your purchase order EDI Messages area within an hour or so of activating an order. If not, contact the PINES Acquisitions Specialist for assistance.

EDI Messages (Purchase Order 685)										
Back Next Filter										
✓ #	Message Type	Status	Time Created	Time Translated	Time Processed	Time of Error	Error	EDI Account	Filename	
1	ORDERS	complete	1/30/17 11:30 AM	1/30/17 11:30 AM	1/30/17 11:30 AM			Midwest	In/SKD9aGlxrm	

ORDRSP

An ORDRSP message is the second EDI message that you should receive on an activated purchase order. This message will be received as part of the thrice a-day fetcher grab, so it may not appear until the next day depending on when the vendor generates it.

This message is the confirmation from the vendor that they successfully received your order. It also includes information on the status of your items. If there are any items in your order that are backordered or out of print/unavailable, Evergreen reads this information from the ORDRSP message and appropriately changes the status of those line items to backordered or cancelled.

INVOIC

These are your electronically transmitted invoices. They should be identical to the printed invoices that you receive from your vendor, as they are just an electronic representation of them. These are also attached to their applicable POs, if available. If for some reason you do not find your invoice attached to your PO—but you've received a printed copy from your vendor—from within the correct PO you can [link your invoice to that PO](#).

Raw INVOIC messages can be viewed from within EDI Messages the same as ORDERS and ORDRSP messages, but to actually view the invoice they are accessed via the **View Invoices** button in a purchase order.

15 7:57 AM

Prepayment Required? No

Activatable? Activated

Notes (0)

EDI Messages (116)

History [View](#)

Invoicing [View Invoices \(4\)](#) [Create Invoice](#) [Link Invoice](#) ▼

Reports

If you would like to know when a new EDI invoice has been fetched, there is a pre-made report available. This report can be set to run automatically at any interval you choose (daily is recommended). It should be set to run at 1am or later, as that will pick up things brought in with the previous 11pm fetcher run.

The report is located in **Reports→Shared Folders→PINESAcqadmin→Invoices** and is called “New EDI Invoices.”

Column	Transform	Action	User Params
EDI Message -> Time Created	Date	Greater than or equal to	Relative Date ▼ 1 ▼ Day(s) ago
Organizational Unit -> Organizational Unit ID	Raw Data	In list	<div> FRRLS-TY STATELIB STATELIB-B STATELIB-GDC STATELIB-I Add Del STATELIB </div>
EDI Message -> Message Type	Raw Data	Equals	INVOIC

Output Options

- ☒ Excel Output
- ☐ CSV Output
- ☒ HTML Output
 - ☒ Bar Charts
 - ☐ Line Charts

Recurring Report: ☒

Recurrence Interval: 1 ▼ Day(s) ▼

☐ Run as soon as possible

☒ 2018-07-09 2 AM ▼

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