ICEDIS Meeting at NASIG 2012

Putting Claim and Claim Response Messages To Work

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ICEDIS Claim & Claim Response Message

• Structured means of communicating claims for missing, damaged or otherwise incorrectly fulfilled journal issues and responses (cancellations).
• Focus on print, e-access for later discussion
• Replacement for EDIFACT and X12 widely used between Agent and ILS Vendors, but limited take up between Publisher and Agents
• Expressed in XML, within EDItX family of transactional standards.
• Version 0.1 published February 2011
  – http://www.editeur.org/59/ICEDIS/#Claims message
Claim and Claim Answer Scenario

• Sample messages published July 2011
  – Coolweather College: sends claim
    • Missing or damaged issue
  – Apogee Agency: internal checks
    • Publication schedules, subscription period, etc...
  – Pluperfect Publishers: receives claim and responds
    • Replacement sent, premature, out of print will reprint and supply

• Benefits
  – Improve fulfillment / service
  – Reduce manual work / cost
  – Increase accuracy / avoid duplication
Identifying the resource

- Identifiers: ISSN, publisher, agent
- Title Name
- Component – Indicate part of package, collection, or a print + online

```
<Resource>
    <ResourceIdentifier>
        <ResourceIDType>07</ResourceIDType>
        <IDValue>12345678</IDValue>
    </ResourceIdentifier>

    <ResourceTitle>
        <TitleType>01</TitleType>
        <TitleText>Geography of Erewhon: an International Journal</TitleText>
    </ResourceTitle>
    <ResourceForm>JB</ResourceForm>
</Resource>
```
Identifying the issue

- Single Release
  - SICI (Serial Item Contribution Identifier) can be given
  - Enumeration: Six levels of hierarchy
  - Chronology: Serials ONIX Code List 55 Date Format
  - Indexes/supplements: SupplementEnumeration
  - Combined releases: Repeating IncludedRelease

```xml
<Release><ReleaseType>01</ReleaseType>

<ReleaseIdentifier><ReleaseIDType>10</ReleaseIDType>
<IDValue>1234-5678(201010)29:10<>1.0.TX.2-Y</IDValue></ReleaseIdentifier>

<Enumeration><Level1><Unit>Volume</Unit><Number>29</Number></Level1>
<Level2><Unit>Issue</Unit><Number>10</Number></Level2></Enumeration>

<NominalDate><DateFormat>01</DateFormat><Date>201010</Date></NominalDate>
</Release>
```
Claim Reason and Response Codes

• Code lists derived from EDIFACT with updates based on business needs of Working Group members

• Part of Serials ONIX Code List
  List 180 = Claim Reason (8)
  List 181 = Claim Response (39)

• Determine what codes you support and what actionable steps should be taken for each (update publication schedules)

• Important point to review with implementation partners
Key match points

- Customer Identifiers and contact details
  
  `<CustomerIdentifier><CustomerIDType>06</CustomerIDType>  
  <IDValue>4567890123452</IDValue></CustomerIdentifier>`

- Order References: Customer PO, Publisher, Agent
  
  `<OrderReferenceCoded>  
  <ReferenceTypeCode>02</ReferenceTypeCode>  
  <ReferenceNumber>PLU44556</ReferenceNumber></OrderReferenceCoded>`

- Payment references
  
  `<PaymentReferenceCoded><ReferenceTypeCode>03</ReferenceTypeCode>  
  <ReferenceNumber>998877</ReferenceNumber>  
  <ReferenceDateTime>20091125</ReferenceDateTime></PaymentReferenceCoded>`
Getting to work


• Process design
  – Communication protocol for exchange
  – Notifications and alerts
  – Reconciliation: response for each claim sent
  – Managing exceptions
  – Implementation guidelines for partners
  – Promote standards