



Alma Acquisitions APIs for GOBI and eBook Central

Agenda

1

Introduction

2

Setting up a real-time acquisitions workflow with LSP

3

GOBI

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Resources

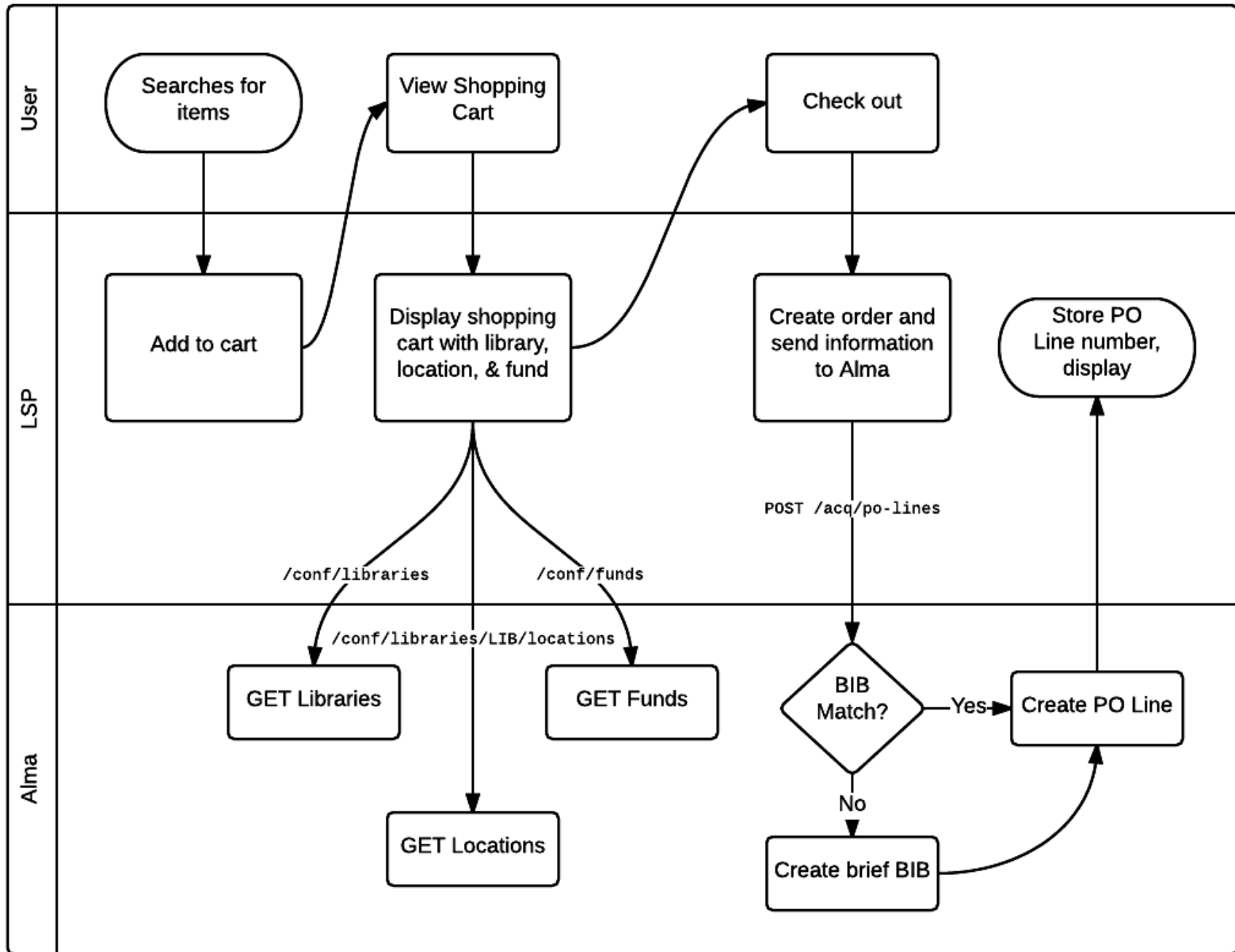
Introduction

- An end-to-end real-time acquisitions workflow combines a Library Service Provider (LSP) with Alma for product selection and ordering
- The vendor reference number is stored as part of the Alma PO line
- Alma PO line number is kept as part of the LSP order details

Descriptive Flow

1. User searches for items and places them in the LSP shopping cart (or equivalent)
2. User verifies owning library, fund codes and other relevant information
3. At checkout, LSP sends shopping cart data to Alma using the **Create PO line API**
4. Alma validates the received PO line information (see **PO line object**)
5. Alma attempts to match the records using standard identifiers; if no match is found, Alma creates a brief bibliographic record for the order
6. Alma responds with the newly created PO line number to the LSP
7. PO line is processed in Alma as other PO lines are processed; if an order requires manual review, Alma sends it to the *In Review* task list

RTA Workflow



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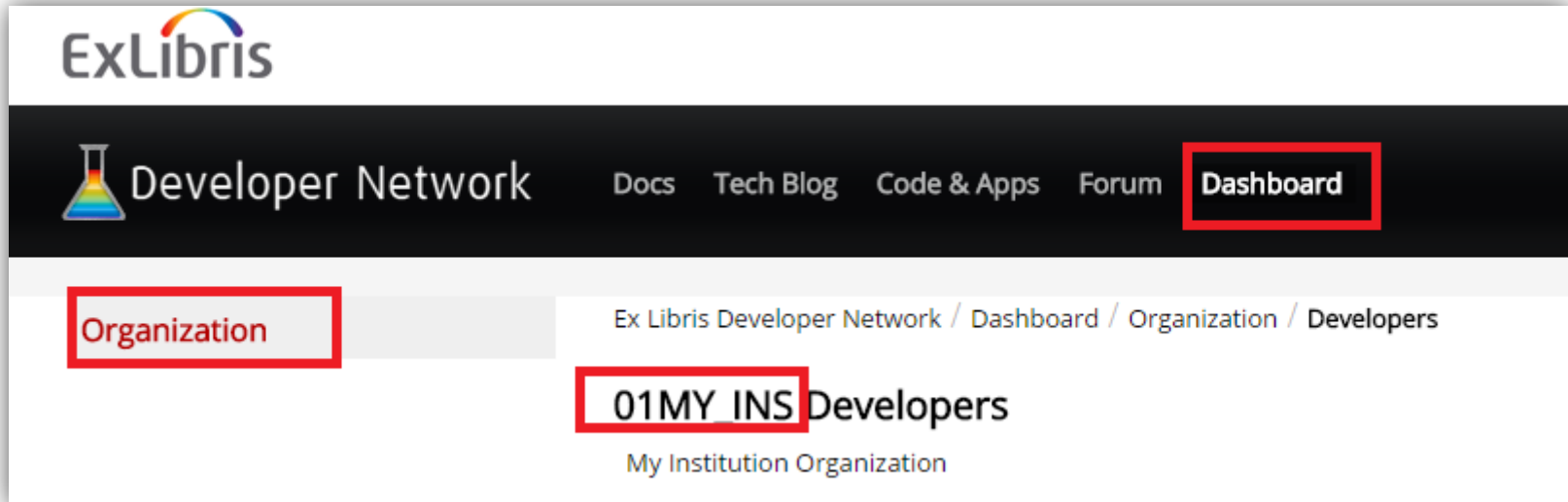
Set-Up: RTA Workflow with LSP

▪ API Key

- An API key should be generated by you and supply to the LSP
- Login to the [Developers Network](#) using your institution's account
 - **Make sure you are connected with your institutional account and not with your personal account**



Set-Up: RTA Workflow with LSP



■ API Key, cont.

- Define an application with the name "Integration with LSP"
- Add "Acquisition" API to the application, with read/write plan for your **production** environment
- Add "Configuration" API to the application, with read only plan for your **production** environment

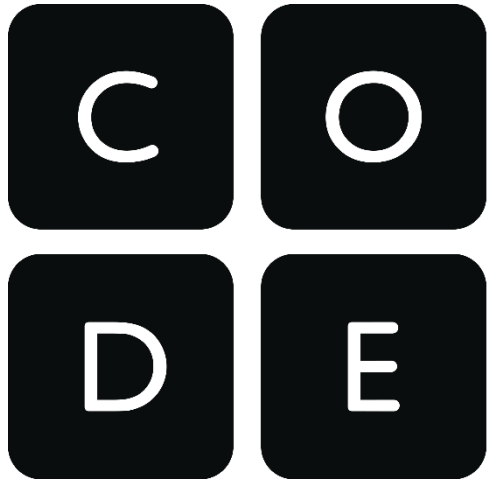
Set-Up: RTA Workflow with LSP

- Copy the API key of the application (this is the API key that will be used as part of the LSP API calls in order to identify your institution)
- Vendor code and Vendor account code
 - information regarding the vendor record in Alma representing the LSP
- Owning Library code(s)
 - this is the library to which the created PO line will be assigned
 - you will need to supply a list of possible library codes to LSP

Set-Up: RTA Workflow with LSP



- Location code(s)
 - Location(s) in which the related item(s) will be created
 - Relevant only for physical material



- Fund code(s)
 - Fund(s) to which payment will be assigned

RTA Configuration in Alma

- MD Editor template
 - ensure that a default metadata template is configured
 - MD Editor > template > choose > click properties > check as default
- Decide about the matching rules that you want to apply

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GOBI General Considerations

- **!!! YBP does not have a testing environment, hence the API key must be defined for your Alma production environment**
- Several configurations must be adjusted with your YBP services when planning to implement the GOBI API
- Some of these functions overlap, so changes will vary depending on the service choices you use



GOBI General Considerations

- Of particular note, if your institution uses YBP's EOCR, EOCR+, EDI or cataloging services, and the OCLC-YBP Cataloging Partners services, adjustments to your YBP "Tech Specs" are required
- For OCLC-YBP Cataloging Partners services, you will need to update settings in WCM to work with Alma and your revised YBP spec
- YBP's Shelf Ready services may be used independently of the GOBI API as they are separate functions and one does not replace or exclude the other

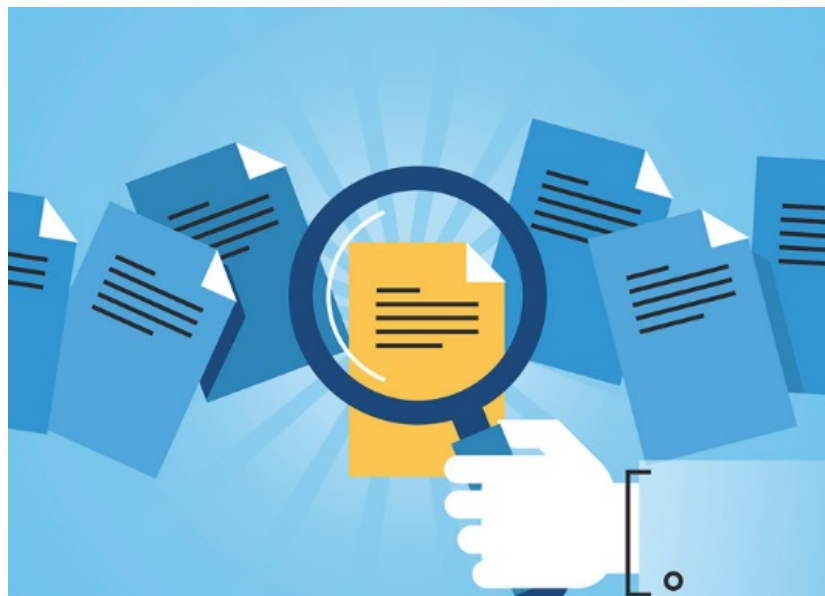
GOBI General Considerations

- GOBI API will likely replace the YBP's EOCR service, as the API provides greater efficiency for the ordering process
- Integration with YBP
 - the vendor account representing YBP should be defined with 0% discount



Preparing the GOBI API

- Work with your YBP account manager as part of the set-up process



- You will be asked to gather and deliver information:
 - List of Alma fund codes
 - List of Alma libraries and locations
 - List of Alma reporting codes

Preparing the GOBI API

- There will be numerous questions to answer, some of which are shown below:



- Are you planning to receive Alma-compatible EDI invoices?
- Are you migrating open orders from Millennium/Sierra to Alma?
- What is your shut-down date for Sierra/Millennium?
- What is your go-live date for Alma?
- Do you plan to continue shelf-ready or other specific YBP services?

Terminology

YBP Order Key functions as unique identifier for each *order placed* and is *integral to EDI invoicing*; aka YBP Order Number, GOBI Order Key, and GOBI Order Number

YBP Order Key (aka YBP or GOBI Order Key or #) is referred to in OCLC's WCM as the Vendor Order Number, and in Alma as the Vendor Reference Number

YBP Order Key functions as a separate element from the YBP/GOBI UID (apparently, a point of confusion for many)

GOBI UID (aka YBP UID, aka GOBI/YBP Title ID) is the unique manifestation-level number assigned to each GOBI *title*.

This means that hardback and paperback editions have different GOBI UID numbers; this element is *not pertinent* to EDI invoicing

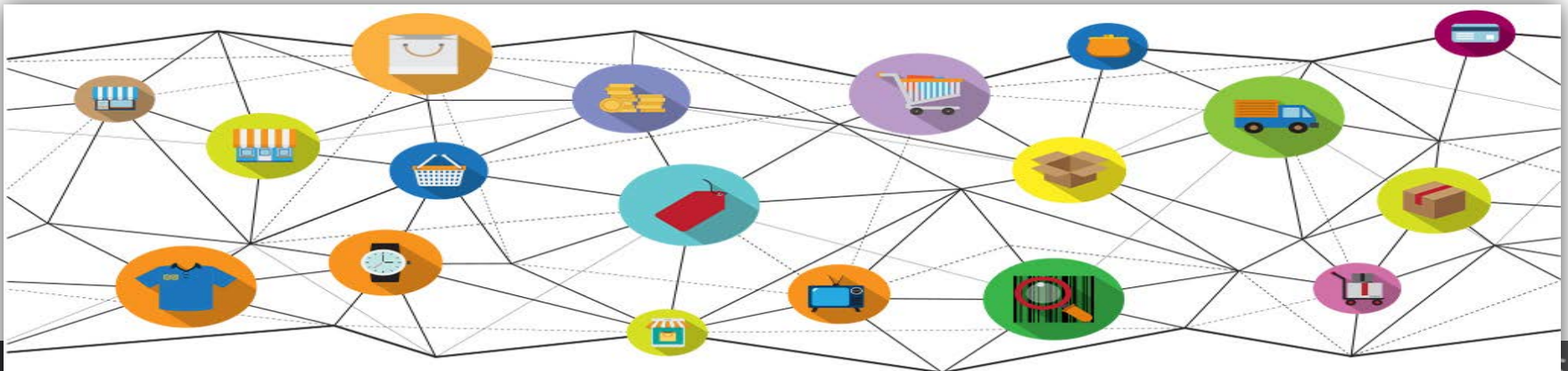


Mapping Considerations

- Alma POLs are returned to YBP in the API process for FIRM orders and serves as the link between GOBI API orders and correlating EDI invoices (if choosing EDI invoicing)
- *For non-GOBI API orders* such as approvals, EDI invoicing is enabled by mapping the YBP/GOBI Order Key/Number *via* WCM (where it is called the Vendor Order Number) which is mapped *via* your Alma New Order Import Profile to the Alma Vendor Reference Number field
- **Reminder: GOBI Order Key → WCM Vendor Order Number → Alma Vendor Reference Number**

Mapping Considerations

- YBP outputs the GOBI UID to the 035 \$b, specifically mapping it there to avoid confusion between that number and typical OCLC entries in the 035 \$a
- In case of an existing 035 (which there should be in most cases), a separate 035 field will be created
- YBP/GOBI UID is provided in the 035 \$b as an *additional* match point, if needed



How it Works

GOBI 3 Search Results

www.gobi3.com/hx/falcon.ashx?location=basicsearchrun&container=11928281&type=BusyPod&groupdescription=basicsearchsubmit.post.BusyPod&groupid=aef285fa438e427da4d1bff95e1972ee

Keyword: 978-1844657117

Search

Spotlight Lists | Search | Notifications | Folders | Reports | Options | Library | Links

Sort | Filter OFF

Search Result: 3

Add to Cart | GobiExpress | Rush | Request DDA

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Binding

eBook (2) x

Cloth (1) x

Publication Year

2013 (3) x

US Profiled Date

UK Profiled Date

LC Classification

US Price

100.01 USD to 200 USD (6) x

200.01 USD to 500 USD (2) x

UK Price

eBook Supplier

Imprint Type

Content Level

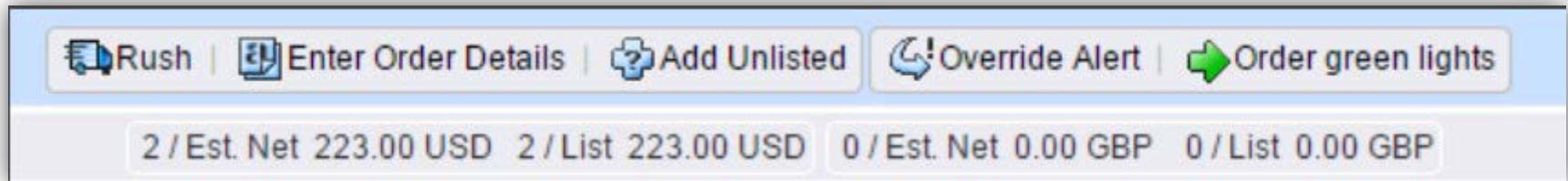
Select Profiling Level

Format

<p>Title: HANDBOOK OF CONTEMPORARY ANIMISM</p> <p>Editor: GRAHAM HARVEY</p> <p>Publisher: ACUMEN</p> <p>LC Class: GN471.H36 2013</p> <p>Language: English</p> <p>US List: 140.00 USD</p> <p>Also Available From: YBP MARKETPLACE</p> <p>UK List: 90.00 GBP</p> <p>Library Note: Add...</p>	<p>Content Level: ADV-AC</p> <p>US Status: Orders accepted</p> <p>UK Status: In Stock</p>	<p>Pub Year: 2013</p> <p>YBP Select: Research-Recommended</p> <p>alternate editions (1P/2E)</p>	<p>ISBN: 9781844657117</p> <p>Binding: Cloth</p>																																			
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<p style="text-align: center;">NON-RETURN/NO-CANCEL YBP</p> <table border="1"> <thead> <tr> <th>Supplier</th> <th>Purchase Option</th> <th>Library DDA</th> <th>List Price</th> <th>Status</th> <th>Library Availability</th> <th>Preview</th> </tr> </thead> <tbody> <tr> <td>+ EBL</td> <td>3 User</td> <td></td> <td>175.00 USD</td> <td>Available</td> <td>Yes</td> <td>Preview</td> </tr> <tr> <td>+ EBL</td> <td>Non-Linear Lending™</td> <td></td> <td>210.00 USD</td> <td>Available</td> <td>Yes</td> <td>Preview</td> </tr> <tr> <td>+ EBSCOhost</td> <td>1 User</td> <td></td> <td>140.00 USD</td> <td>Available</td> <td>Yes</td> <td>Preview</td> </tr> <tr> <td>+ EBSCOhost</td> <td>2 User</td> <td></td> <td>175.00 USD</td> <td>Available</td> <td>Yes</td> <td>Preview</td> </tr> </tbody> </table> <p>Library Note: Add...</p> <p>alternate editions (1P/2E)</p>				Supplier	Purchase Option	Library DDA	List Price	Status	Library Availability	Preview	+ EBL	3 User		175.00 USD	Available	Yes	Preview	+ EBL	Non-Linear Lending™		210.00 USD	Available	Yes	Preview	+ EBSCOhost	1 User		140.00 USD	Available	Yes	Preview	+ EBSCOhost	2 User		175.00 USD	Available	Yes	Preview
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How it Works

- When everything is “good to go” in GOBI, the *Green Lights* option to order appears



- **ORDER ACKNOWLEDGEMENT** activates the API

ORDER ACKNOWLEDGEMENT

Title: PARENTAL INCARCERATION AND THE FAMILY: PSYCHOLOGICAL AND SOCIAL EFFECTS OF IMPRISONMENT

Author: ARDITTI, JOYCE A

Publisher: NEW YORK UNIVERSITY PRESS

LC Class: HV8886.U5A73 2012

Content Level: ADV-AC

Language: English

How it Works

- A brief Bib record is added to Alma

Privacy's Blueprint: The Battle to Control the Design of New Technologies i v

MMS ID	99210741500521	Suppress from publishing	Yes	Export to WorldCat	Publish Bibliographic re...
Export to Libraries Australia	Don't publish	Brief level	02	Record format	marc21
Originating system	-	Originating system ID	99210741500521	Originating system version	-

MARC **BIBFRAME**

LDR	00398naa a2200133 u 4500
001	99210741500521
005	20180525101450.0
008	180525s2014 xx r 000 0 eng d
020	__ a 0674976002
035	__ a (OCoLC)0674976002
245	__ a Privacy's Blueprint: The Battle to Control the Design of New Technologies

How it Works

- POL created in Alma by GOBI with status of Auto Packaging



Privacy's Blueprint: The Battle to Control the Design of New Technologies, 2014, 0674976002, ISBN

MMS ID: 99210741500521

Assigned to: -

Type: Print Book - One Time

PO line owner: Science Library

Standard number: 0674976002

Order: -

Order Line: POL-7926 / (Auto Packaging)

Copies: Science Library - Science Stacks (1)

Total price: 35.00 USD

Funds: M: Science (100.0%) (2017/06/30 - 2018/06/29)

Vendor/Account: Yankee Book Peddler / Yankee Book Peddler
YANKEE

Vendor reference ID: -

Expected delivery: -

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Ebook Central General Considerations

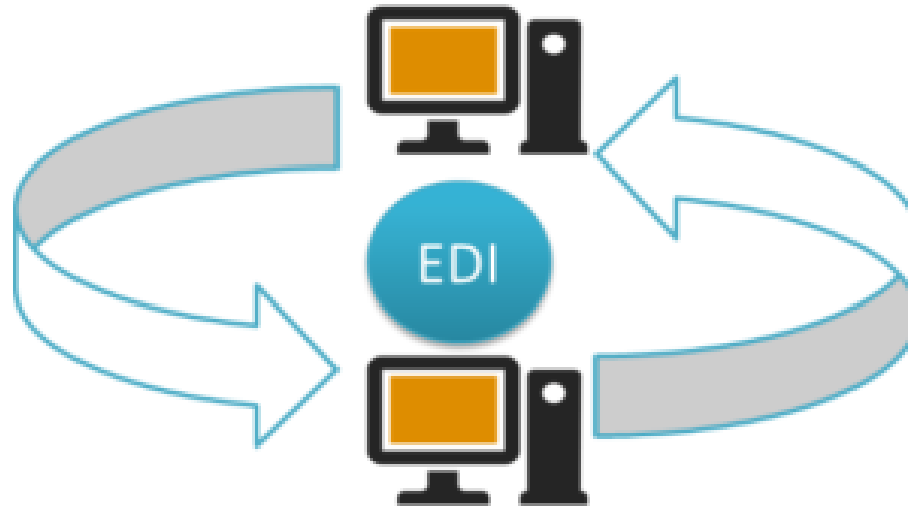
- Ebook Central and Alma are integrated using EOD, EDI and, when necessary, an additional bibliographic import profile
- Three types of records are managed with the integration:
 - Financial (order creation)
 - Bibliographic (record creation)
 - Inventory (electronic portfolio creation)

Ebook Central General Considerations

- To achieve integration...
 1. EOD is used to create bibliographic records, inventory and orders
 2. EDI is used to receive invoices from the vendor
 3. Import profiles are used to overlay bibliographic records



Regarding EDI



- EDI is used to receive the invoice for the order which was created using the “New Order” import profile
- Note that it is also possible to create both the order and receive the invoice via EDI
- In this case the “New Order” import profile would not be used

New Order Import Profile

Import Profile Details

Profile Type: New Order Profile name: ProQuest Ebook Central EOD New Order Profile

Profile Details Normalization & Validation Match Profile Set Management Tags Inventory Information PO Line Information Mapping

Profile Details

Profile name * ProQuest Ebook Central EOD New Order Profile

Profile description ProQuest Ebook Central EOD New Order Profile

Originating system * ProQuest Ebook Central

Import Protocol Upload File/s

Physical source format XML

Source format MARC21 Bibliographic

Status Active

File name patterns

Cross walk Yes No

Target format MARC21 Bibliographic

New Order Import Profile

Import Profile Details

Profile Type: New Order Profile name: ProQuest Ebook Central EOD New Order Profile

Profile Details Normalization & Validation **Match Profile** Set Management Tags Inventory Information PO Line Information Mapping

Match Profile

Serial match method: 024 / 035 Match Method
Non Serial match method: 024 / 035 Match Method

Match Actions

Handling method: Automatic Manual
Upon match: Merge Overlay Do Not Import Import New Record

Merge/Overlay

Merge method: Overlay all fields but local

Allow bibliographic record deletion:
Do not Override/merge a record with lower brief version:
Unlink bibliographic records from community zone:
Do not override/ merge record with an older version: Disabled Consider Originating System Ignore Originating System

Merge Records and Combine Inventory for Multi-Match

Merge and Combine: Disabled Manually
Preferred record: Record with the most items
Secondary record: Delete Suppress Keep it
Merge method: Overlay all fields but local
Update holding call number:

New Order Import Profile

Import Profile Details

Profile Type: New Order Profile name: ProQuest Ebook Central EOD New Order Profile

Profile Details Normalization & Validation Match Profile Set Management Tags **Inventory Information** PO Line Information Mapping

Inventory Operations

Electronic Mixed Physical

E-Book Mapping

Delete/deactivate portfolios

Portfolio type Standalone Part of an electronic collection

Material type: Book

Enable proxy: False

Single portfolio Multiple portfolios

Extract access URL from field: 856 subfield: u Indicators to skip (use # for empty indicator):

Extract interface name from field: subfield: Default interface name: ProQuest Ebook Central

Extract internal description note from field: subfield: Default internal description note:

Extract authentication note from field: subfield: Default authentication note:

Extract public note from field: 856 subfield: z Default public note:

Extract available for from field: subfield: Default Available for:

New Order Import Profile

Import Profile Details

Profile Type: New Order Profile name: ProQuest Ebook Central EOD New Order Profile

Profile Details Normalization & Validation Match Profile Set Management Tags Inventory Information **PO Line Information** Mapping

EOD General Parameters

Electronic PO Line type *

Multiple vendors

Vendor Vendor account

PO Line currency

Decimal point location

Acquisition Method

EOD mapping

Additional PO Line Reference field	<input type="text"/>	subfield	<input type="text"/>
Vendor Reference Number field	<input type="text" value="035"/>	subfield	<input type="text" value="a"/>
Vendor Reference Number type field	<input type="text"/>	subfield	<input type="text"/>
List price field	<input type="text" value="980"/>	subfield	<input type="text" value="b"/>
Vendor title number field	<input type="text"/>	subfield	<input type="text"/>
Volume Part Number field	<input type="text"/>	subfield	<input type="text"/>
PO number field	<input type="text"/>	subfield	<input type="text"/>
PO Line Owner field	<input type="text"/>	subfield	<input type="text"/>
Default PO Line owner	<input type="text" value="Main Library"/>		
Map Owner	<input type="checkbox"/>	subfield	<input type="text" value="b"/>
Fund distribution field	<input type="text" value="981"/>		Percent subfield <input type="text"/>
Default fund	<input type="text" value="Information Technology E-reso"/>		
Map funds	<input type="checkbox"/>	subfield	<input type="text" value="d"/>
Reporting code field	<input type="text" value="980"/>		Default <input type="text"/>
Interested users field	<input type="text"/>	subfield	<input type="text"/>
Vendor invoice number field	<input type="text"/>	subfield	<input type="text"/>
Note field	<input type="text" value="985"/>	subfield	<input type="text" value="a"/>
Rush request field	<input type="text"/>	subfield	<input type="text"/>
Receiving note field	<input type="text"/>	subfield	<input type="text"/>
Note to vendor field	<input type="text"/>	subfield	<input type="text"/>
Ordered ISBN/ISSN field	<input type="text"/>	subfield	<input type="text"/>

Do not create electronic activation task

Sample EOD File

```
<datafield tag="020" ind1=" " ind2=" ">
  <subfield code="a">9781137550132</subfield>
  <subfield code="q">(electronic bk.)</subfield>
</datafield>
<datafield tag="020" ind1=" " ind2=" ">
  <subfield code="z">9781137603272</subfield>
</datafield>
<datafield tag="035" ind1=" " ind2=" ">
  <subfield code="a">EBC4716611</subfield>
</datafield>
<datafield tag="035" ind1=" " ind2=" ">
  <subfield code="a">EBL4716611</subfield>
</datafield>
<datafield tag="035" ind1=" " ind2=" ">
  <subfield code="a">(CaPaEBR)ebr11281811</subfield>
</datafield>
<datafield tag="035" ind1=" " ind2=" ">
  <subfield code="a">(MiAaPQ)EBC4716611</subfield>
</datafield>
<datafield tag="856" ind1="4" ind2="0">
  <subfield code="u">http://ebookcentral.proquest.com/lib/uwsau/detail.action?docID=4716611</subfield>
  <subfield code="z">Click Here Please</subfield>
</datafield>
<datafield tag="980" ind1=" " ind2=" ">
  <subfield code="b">10000</subfield>
  <subfield code="d">REPORTING_CODE</subfield>
</datafield>
<datafield tag="981" ind1=" " ind2=" ">
  <subfield code="b">FUND_CODE</subfield>
</datafield>
<datafield tag="985" ind1=" " ind2=" ">
  <subfield code="A">NOTE_FIELD</subfield>
</datafield>
```

Vendor EDI Profile

The screenshot shows a web application interface for 'Vendor Details'. At the top, it displays 'Vendor name ProQuest' and 'Vendor code ProQuest'. Below this is a navigation bar with several tabs: 'Summary', 'Contact Information', 'Contact People', 'EDI Information' (highlighted with a red box), 'Usage Data', 'System Integration', 'Invoices', 'PO Lines', and 'Communication'. Under the 'EDI Information' tab, there is a section titled 'Vendor EDI Attributes'. This section contains several fields: 'EDI code' with the value '7606958', 'EDI type' with a dropdown menu showing '31B - US-SAN', 'EDI naming convention' with a dropdown menu showing 'Standard', and 'EDI vendor format' with a dropdown menu showing 'ProQuest'. Below these fields, there are two checkboxes: 'Incoming' which is checked, and 'Shelf Ready Parameters' which is unchecked.

- Vendor EDI Attributes
 - Vendor code = 7606958 (the ProQuest SAN ID)
 - EDI Type = 31B - US-SAN
 - EDI naming convention = Standard
 - EDI Vendor format = ProQuest
- Incoming
 - Check the box “Incoming”
- Per Organization Unit EDI
 - Vendor code = 7606958 (the ProQuest SAN ID)
 - EDI type: 31B - US-SAN

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- [Developer's Network: RTA Overview](#)
- [Developer's Network: RTA Configuration for Libraries](#)
- [Developer's Network: RTA Configuration for Vendors](#)
- [Developer's Network: Working with APIs](#)



THANK YOU