

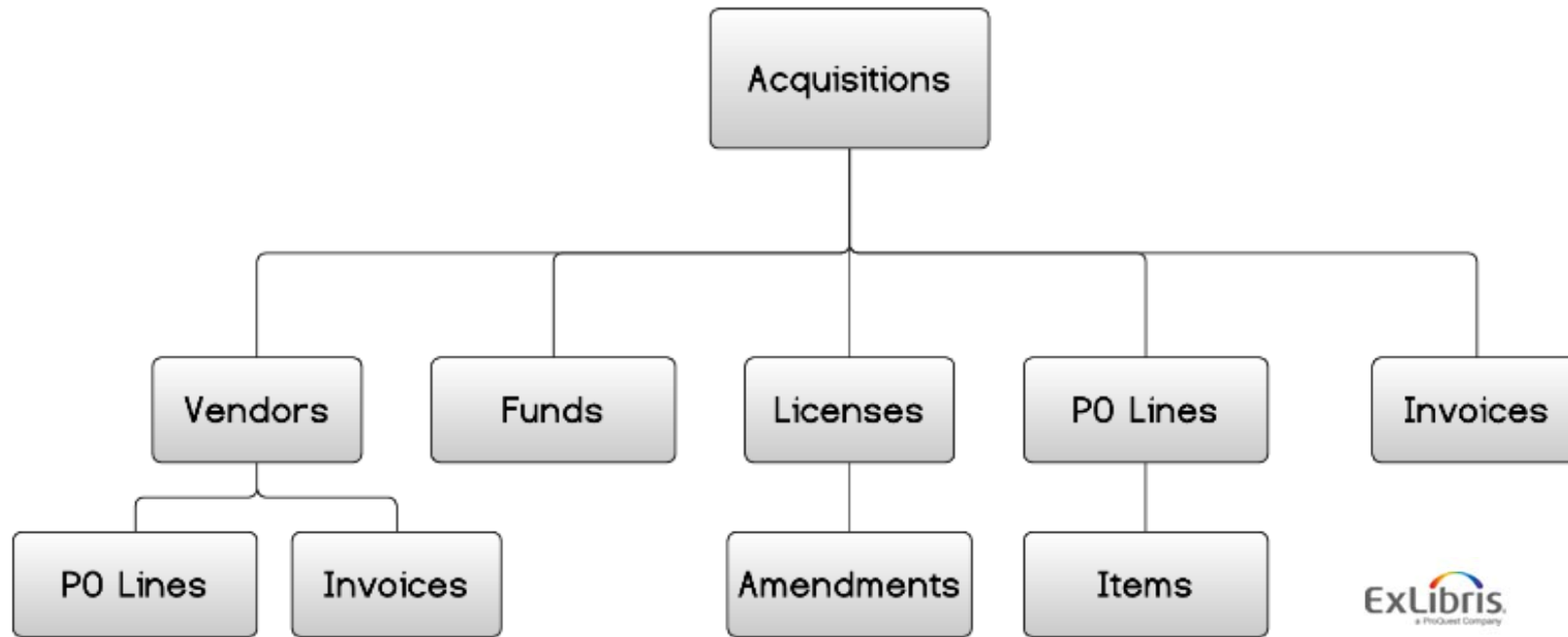


UniSA

# GOBI and E-book Central API integration with Alma

Anthony Abela, Acquisitions Librarian

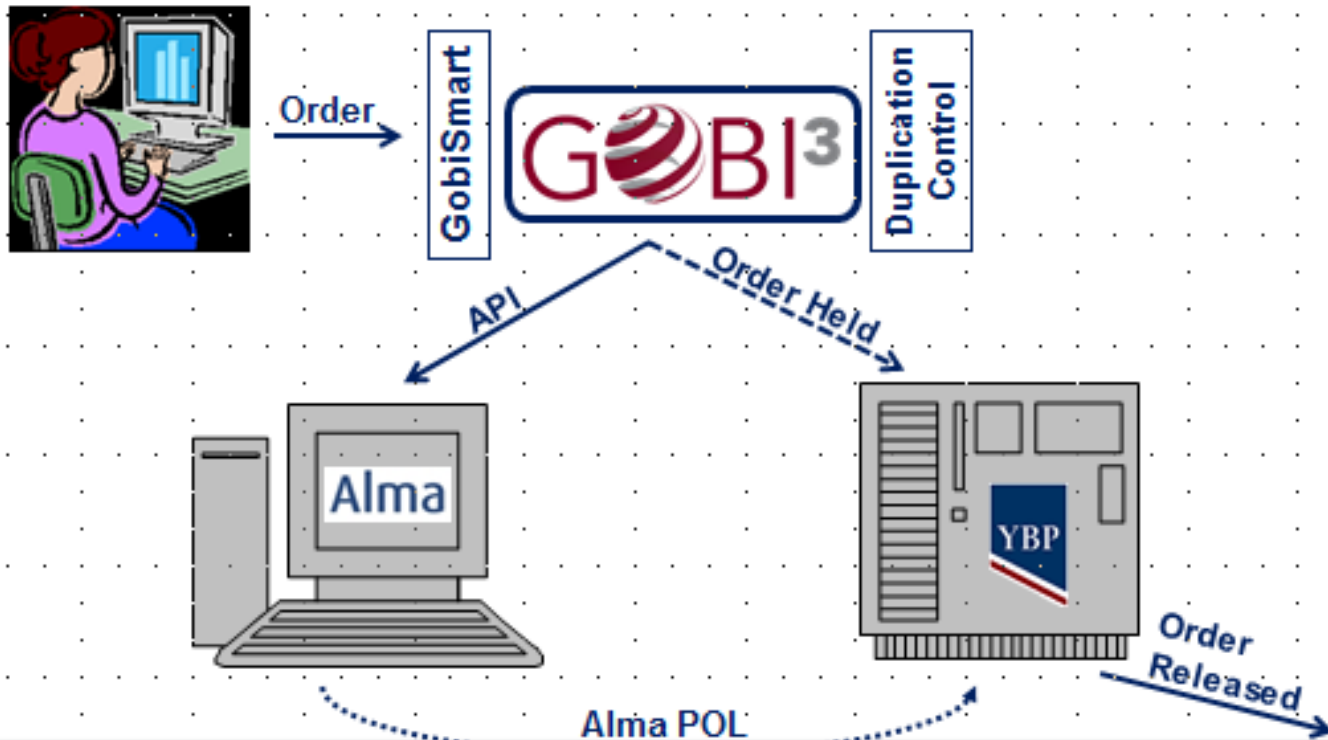
ANZREG 2018





UniSA

# GOBI Real Time Acquisitions (RTA) Service Overview



YBP Library Services  
a Baker & Taylor company



## GOBI Real Time Acquisitions Workflow



GOBI Real Time Acquisitions replaced GOBI orders/EOCRS or GobiExport/EDI ordering.

Real Time Acquisitions is a process that occurs almost simultaneously.

At UniSA this changed the process for point of order but not point of shipment/invoicing



# GOBI Order Details form (customised)

## Order Details

1 item.

**Title:** HISTORY OF THE UNIVERSITY OF CAMBRIDGE; V. III: 1750-1870.  
**Author:** SEARBY, PETER  
**Publish Year:** 1997 **ISBN:** 9780511582202

Please Choose Template: or enter order details below.

Subaccount\*

PO Number

Fund Code\*  
  
↑Choose or Type↓

Library\*

Notes to vendor

eBook Local Notes

Print Local Notes

Collection\*

Reporting Code\*

No Substitutions

Initials\*

Quantity

eBook Purchase Option\*

List Action

- Retain Marked Status on Items in List
- Remove Marked Status on Items in List



# GOBI Order Details

**Title:** DEVELOPING FACULTY IN LIBERAL ARTS COLLEGES: ALIGNING INDIVIDUAL NEEDS AND ORGANIZATIONAL GOALS.

**Author:** BAKER, VICKI L., 1978-

**Pub Year:** 2017

**Series Title:** [AMERICAN CAMPUS.](#)

**Publisher:** RUTGERS UNIVERSITY PRESS

**Series ID:** 74565

**ISBN:** 9780813586830

**Binding:** eBook

**Series Type:** Unnumbered Series

Action	Date	Qty	Descriptor	Subaccount	Fund/ Other	PO#	Initials	Submitted By	Invoice#	Tracking#
Shipped	4/25/2018	1	US EBOOK ORDER/SLIP	1133-41	EAS	POL-41918/NR			<a href="#">547920</a>	
<a href="#">Order</a>	4/23/2018	1	US EBOOK ORDER/SLIP	1133-41	EAS	POL-41918/NR	GS	GS		

[- close -](#)

Non-returnable/non-cancelable alert overridden.

**YBP Order Key:** 99976409736

**Notes to vendor:**

**Library:** IRT

**eBook Local Notes:** Place hold or notify Alistair McCulloch (mcculla).

**Print Local Notes:**

**Collection:** TSBOO

**Reporting Code:** LB

**Supplier:** JSTOR

**Purchase option:** Unlimited User Access

**Title:** ABSOLUTE POWER: HOW THE POPE BECAME THE MOST INFLUENTIAL MAN IN THE WORLD.

**Author:** COLLINS, PAUL

**Pub Year:** 2018

**ISBN:** 9781610398602

**Binding:** Cloth

Action	Date	Qty	Descriptor	Subaccount	Fund/ Other	PO#	Initials	Submitted By	Invoice#	Tracking#
Shipped	5/4/2018	1	US FIRM	1133-10	EAS	POL-41946			<a href="#">561145</a>	<a href="#">6428387383</a>
<a href="#">Order</a>	4/23/2018	1	US FIRM	1133-10	EAS	POL-41946	GS	GS		

[- close -](#)

**YBP Order Key:** 99976429822

**Notes to vendor:**

**Library:** ML

**eBook Local Notes:**

**Print Local Notes:** Notify boywergj BPR Greg Bowyer Pickup from ML

**Collection:** MLMAIN

**Reporting Code:** BK

**Supplier:** HACHETTE BOOK GROUP

**Purchase option:**



# GOBI PO Line Summary Screen in Alma

Purchase Order Line Details

Save as template Replace (only) Vendor Change Bib Reference Change vendor Cancel line Relink Back Save

Absolute power : how the pope became the most influential man in the world / Paul Collins., New York ; PublicAff...

Order Line POL-41946 Order PO-318769 Status Sent (2018-04-24)  
Order line type Physical - One Time PO line owner RTS/ADMIN Sent date 24/04/2018

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History Notes Attachments

Ordered Items

Library	Location	Barcode	Receiving Date	Item Policy
1 Mawson Lakes Library	Mawson Lakes Main	-	-	-

Receiving note Notify boywerj BPR Greg Bowyer Pickup from ML Routing during receiving

Vendor Information

Material supplier \* YBP Library  
Expected receipt after ordering (days) 45

Pricing

List price \* 28.00  
Quantity for pricing \* 1

Funding

Add Fund

#	Fund Name
1 1	EAS Division (FY-2018) (

Purchase Order Line Details

Save as template Reopen Change Bib Reference Relink Back Save

Developing Faculty in Liberal Arts Colleges : Aligning Individual Needs and Organizational Goals., New Brunswick ; Rutgers Univer...

Order Line POL-41918 Order PO-319258 Status Closed (2018-05-02)  
Order line type Electronic Title - One Time PO line owner RTS/ADMIN Sent date 27/04/2018

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History Notes Attachments

1 - 4 of 4 Created by

Created On	Updated On	Updated By	Note
1 23/04/2018	23/04/2018	API, Ex Libris	Purchase option: JSTOR - Unlimited User Access
2 23/04/2018	23/04/2018	API, Ex Libris	eBook Local Notes: Place hold or notify Alistair McCulloch (mccullaj).
3 23/04/2018	23/04/2018	API, Ex Libris	Invoice GS
4 23/04/2018	23/04/2018	API, Ex Libris	Subaccount: 1133-41



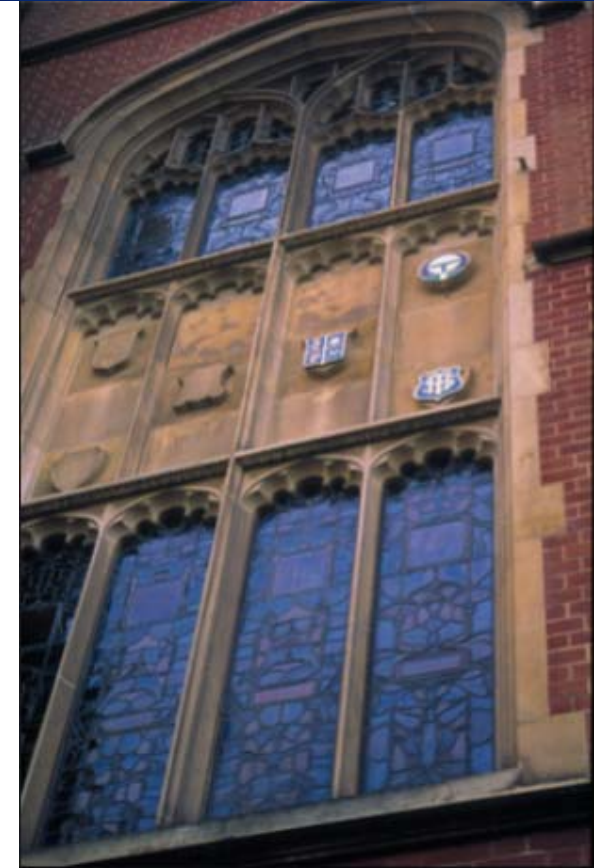
# Alma Bibliographic Records

## ROUTLEDGE HISTORY OF DISABILITY

MMS ID	9916193711001831	Suppress from publishing	No	Export to WorldCat	Don't publish
Export to Libraries Australia	Don't publish	Brief level	01	Record format	marc21
Originating system	NEW_ORDER_API	Originating system ID	9916193711001831	Originating system version	-

MARC **BIBFRAME**

LDR nam a22 i 4500  
001 9916193711001831  
007 cr#cn#nnn|||||  
008 s xx o 000 0 eng d  
020 \_\_la 9781315198781  
035 \_\_la (OCoLC)1012259067  
040 \_\_la SUSA |b eng |e rda |c SUSA  
082 04 |2 23  
245 \_\_la ROUTLEDGE HISTORY OF DISABILITY  
260 \_\_la LONDON |b ROUTLEDGE |c 2018  
264 \_4 |c ©  
300 \_\_la 1 resource ( pages)  
336 \_\_la text |b txt |2 rdacontent  
337 \_\_la computer |b c |2 rdamedia  
338 \_\_la online resource |b cr |2 rdacarrier  
504 \_\_la Includes bibliographical references (pages) and index.  
700 1\_ |e author.







# Alma RTA Order Lines

IRT Acquisitions Department



Order Lines - review - unassigned (11)

Tasks requiring your attention

Orders - review (2)

Order Lines with claims (338)

Order Lines - waiting for renewal (221)

Requests - Digitization - need approval (1)

Borrowing requests - New - with no partner - unassigned (22)

Borrowing requests returned by patron - unassigned (4)



Order lines ▾ All ▾ Q Advanced ▾

← Purchase Order Lines in Review (1 - 8 of 8) Cancel

Assigned to Me  Unassigned  Assigned to Others

All ▾ Q ↗ ⚙

▼ Vendor: YBP Library Services Ⓞ

1		<b>BAD NEWS., LONDON, ROUTLEDGE, 2009, 9780203092637, EISBN</b> MMS ID: 9916193709901831 Type: Electronic Title - One Time PO line owner: RTS/ADMIN Standard number: 9780203092637 Order: - Order Line: POL-42323 / (In Review)	<b>Total price:</b> 198.00 USD <b>Funds:</b> EAS Division (100.0%) (FY-2018) <b>Vendor/Account:</b> YBP Library Services / Ebook individual 1133-41 <b>Vendor reference ID:</b> 99976614399 <b>Expected activation:</b> -	<b>License status:</b> - <b>Activation status:</b> Not Activated E-Resource The bib record is brief	<span>Edit</span> <span>Order Now</span> <span>⋮</span>
2		<b>COMPLETE GUIDE TO BUSINESS RISK MANAGEMENT., FARNHAM, GOWER, 2015, 9781315614915, EISBN</b> MMS ID: 9916193609001831 Type: Electronic Title - One Time PO line owner: RTS/ADMIN Standard number: 9781315614915 Order: - Order Line: POL-42312 / (In Review)	<b>Total price:</b> 220.00 USD <b>Funds:</b> IEE Division (100.0%) (FY-2018) <b>Vendor/Account:</b> YBP Library Services / Ebook individual 1133-41 <b>Vendor reference ID:</b> 99976613938 <b>Expected activation:</b> -	<b>License status:</b> - <b>Activation status:</b> Not Activated E-Resource The bib record is brief	<span>Edit</span> <span>Order Now</span> <span>⋮</span>



# Set up work: Library

## YBP-Ex Libris GOBI-Alma API Setup Information

**Date:** 29-Oct-2014  
**Library:** Univ of South Australia  
**Base account:** 1133  
**API Key:** [redacted] 828

### Alma Data

Subaccount	Subaccount description	US or UK	PO line owner (code)	Vendor code	Account code
1133-10	Firm Orders	US	IRT/ADMIN/ILL	YBP	1133-10
1133-13	Dust Jacket Orders	US	IRT/ADMIN/ILL	YBP	1133-13
1133-14	Rush Orders	US	IRT/ADMIN/ILL	YBP	1133-14
1133-19	Bypass Orders	US	IRT/ADMIN/ILL	YBP	1133-19
1133-40	eBook Packages	US	IRT/ADMIN/ILL	YBP	1133-40
1133-41	eBook Orders	US	IRT/ADMIN/ILL	YBP	1133-41
1133-60	Firm Orders	UK	IRT/ADMIN/ILL	YBPUK	1133-60
1133-63	Dust Jacket Orders	UK	IRT/ADMIN/ILL	YBPUK	1133-63
1133-66	Priority Orders	UK	IRT/ADMIN/ILL	YBPUK	1133-66
1133-76	Bypass Orders	UK	IRT/ADMIN/ILL	YBPUK	1133-76

### Alma API: Local Data Mapping from GOBI to API

**Date:** 29-Oct-2014    **Base Acct:** 1133  
**Requested by:** Ann-Marie    **Library:** Univ of South Australia

GOBI Field	Displayed?	GobiSmart Label	Alma API Field	Notes
Location	Yes	Library	Library	
Local Data 1	Yes	Vendor Code	Do Not Output	[can be removed from GOBI screen, since it will be defaulted in the API setup data]
Local Data 2	Yes	Local Notes	Receiving Note	
Local Data 3	Yes	Collection	Shelving Location	
Local Data 4	Yes	Reporting Code	Reporting Code	
Subaccount	Yes	Subaccount	Notes (repeatable)	
Purchase Option	Yes	Purchase Option	Notes (repeatable)	

Please use our existing location and library codes as specified in GobiSmart

Please use our existing fund codes and reporting codes as specified in GobiSmart



# Set up work: YBP

YBP and library fill out API Worksheet

Document in Library Technical Specifications

Implement

API data mappings based on the GobiSmart fields and available Ex Libris API fields

The screenshot shows the INCA web application interface. The main heading is "YBP Setup: API Data Mappings". Below this, there is a "GobiSmart Mappings" section with a table of field mappings. The table has three columns: "GobiSmart Field", "GobiSmart Custom Label", and "ILS Field".

GobiSmart Field	GobiSmart Custom Label	ILS Field
PO Number	P.O. Number	- None -
Fund Code	Fund code	Fund Code
Initials	Initials	Notes (multiples allowed)
Order Notes 1	Instructions to YBP	Vendor Note
Local Data 1	Library	Library
Local Data 2	Location	Shelving Location
Local Data 3	Internal Order Note	Receiving Note
Subaccount	Subaccount	Notes (multiples allowed)
Purchase Option	Purchase Option	Notes (multiples allowed)



# Alma Developers

## Real-time Acquisitions: General Overview

Tamar Fuches on January 5th, 2015

CODE & APPS ALMA REAL-TIME-ACQUISITIONS

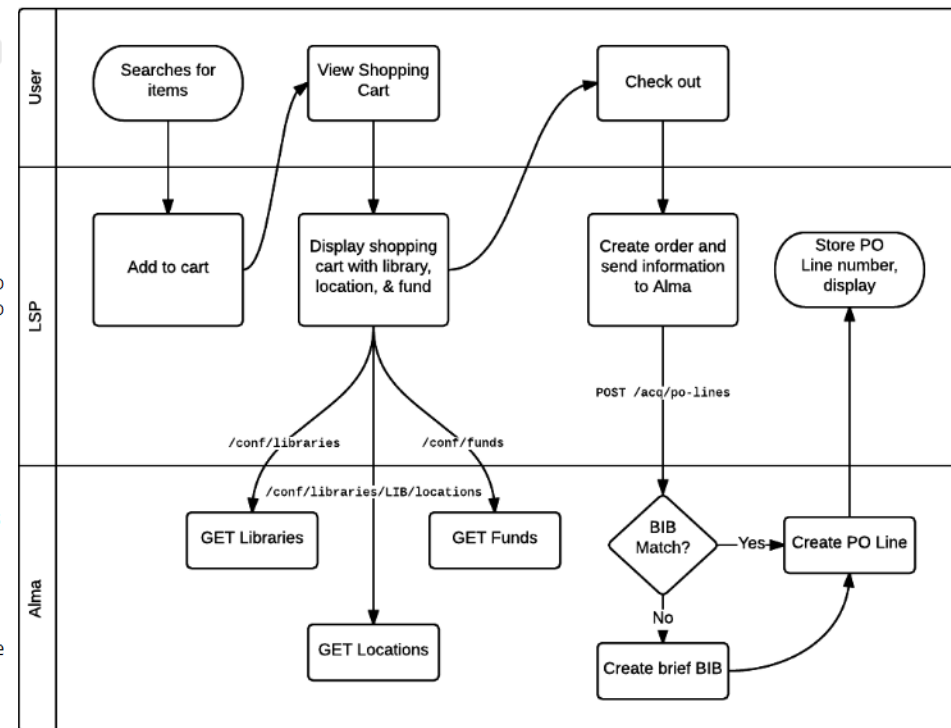
- [Real Time Acquisition General Overview](#)
- [Instructions for Institutions](#)
- [Instructions for vendors](#)
- [General overview of ExLibris APIs methodology](#)
- [Related blogs](#)

Real-time acquisitions is an integration between ExLibris Alma and Academic Library Service Providers, to streamline acquisitions workflows. It incorporates standard ordering and loading technologies with APIs to speed the availability of resources, increase the efficiency of integrating records, and enhance data enrichment.

### Workflow

- The user searches for items in the vendor's system, and places them in the shopping cart (or equivalent).
  - The user verifies owning library, fund codes and other relevant information.
  - At checkout, the vendor sends the shopping cart data to Alma using the [Create PO line API](#).
  - Alma validates the received PO line information (see [PO line object](#))
  - Alma *attempts to match* the bibliographic data using standard identifiers. If no match is found, Alma creates a brief bibliographic record for the order.
  - Alma responds with the newly created PO line number to the vendor.
  - The 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.
- The **vendor reference number** is kept as part of the Alma PO line. **Alma PO line number** is kept as part of the vendor order details.

The following flow chart represents the workflow.



<https://developers.exlibrisgroup.com/blog/Real-time-Acquisitions>



## Limitations

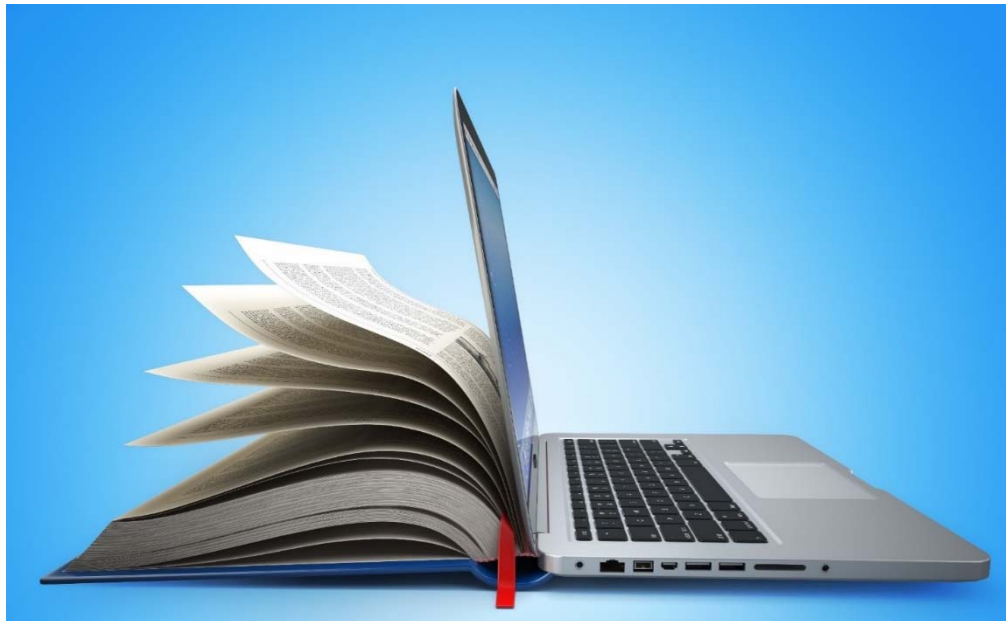
Brief bib data only

Matches to ISBN only

Ebook orders not matched to the Alma Community Zone records



## Future Enhancements



Distinguish P and E for matching purposes

Handling/Matching on other control numbers

Allow for manual selection by library where there are multiple matches

Real-time duplication check against Alma when ordering in GOBI



## EOD and EDI integrations: Alma, PDA and ProQuest ebook Central

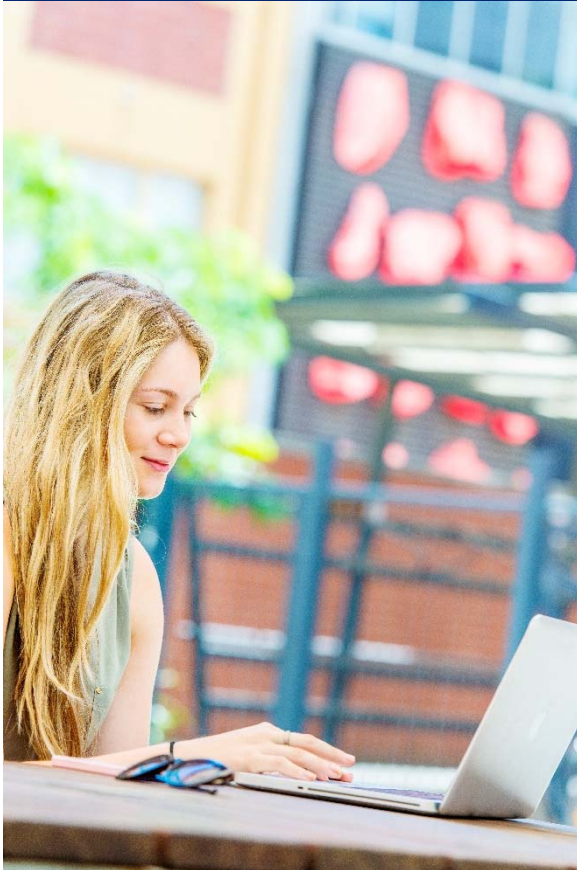
Before EOD & EDI integrations the Library:

- Manually loaded MARC records
- Manually created orders
- Manually created invoices





## EOD integrations: Alma and ProQuest



2015 UniSA EBL (Ebook Library) PDA

ProQuest can supply EOD files through Alma

ProQuest can't offer EDI invoices: in development





# EOD: Library Set Up

## 1 ProQuest Ebook Central (ProQuest PDA)

Portfolio List (64583)

**Type:** Selective package

**Services:** Full Text (Available from: 04/04/2018)

**Linking Level:** Book

**Creation Date:** 2015-06-10 12:52:15

**Modification Date:** 2018-04-06 08:51:17

[Other details](#)

- Build PDA profile parameters with vendor
- Set up PDA in Alma via Manage PDA profiles
- Create PDA local electronic collection
- Create PDA Repository and Order Import profiles

[< Import Profiles](#)

Monitor Imports

Back

Institution

1 - 2 of 2

ID	Sta	Profile name	Profile description	Profile Type	Contributed by	
1	23355503710001831	Acti ProQuest PDA Repository	ProQuest PDA Import Repository as part o...	PDA Repository	-	...
2	23355503720001831	Acti ProQuest PDA New Order	Import ProQuest EOD as part of PDA	PDA New Order	-	...



# PDA Repository Import Profile

## ProQuest PDA Repository

**Profile Type** PDA Repository

Profile Details

Normalization & Validation

Match Profile

Set Management Tags

Inventory Information

### Inventory Operations

**Electronic**

### E-Book Mapping

Delete/deactivate portfolios

**No**

Portfolio type

**Part of an electronic collection**

Electronic Collection

**ProQuest Ebook Central**

Service

**Full Text**

Material type

**Book**

**Single portfolio**

Extract access URL from field

**856**

subfield **u**

Activate resource

**Yes**





# PDA Order Import Profile

## < Import Profile Details

- Profile Details
- Normalization & Validation
- Match Profile
- PO Line Information
- Mapping

Profile Details	
Profile name	ProQuest PDA New Order
Profile description	Import ProQuest EOD as part of PDA
Originating system	Other
Import Protocol	FTP
Physical source format	XML
Source format	MARC21 Bibliographic
Status	Active
File name patterns	eod_*.xml
Cross walk	No

Scheduling	
Files to import	New
Scheduler status	Active
Scheduler	Every day at 05:30
<input type="button" value="Email Notifications"/>	

FTP Information	
Description	-
Server	meta.ebilib.com
Port	21
UserName	unisa
Password	*****
Input directory	eod
Max. Number of Files	1000
Max. file size	1
Size type	GB
Ftp Server Secured	No
FTP Passive Mode	No
<input type="button" value="Test Connection"/>	



# EOD: Match points

Profile Type PDA New Order

Profile Details Normalization & Validation Match Profile

Match Profile

Match by Serial / Non Serial **Yes**

Serial match method **024 / 035 Match Method**

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

001	9915936114401831
005	20151223094214.0
006	m d
007	cr -n-----
008	150629s2013        s       eng d
020	__  a 9781475801088  c 38.99 (UA)
035	__  a EBL1126497

ProQuest PDA New Order

Profile Type PDA New Order

Profile Details Normalization & Validation Match Profile PO Line Information Mapping

EOD General Parameters

Electronic PO Line type	Electronic Title - One Time	Vendor account	Proquest Information and Learning
Vendor	Proquest Information and Learning	Decimal point location	2
PO Line currency	USD	Acquisition Method	Purchase at Vendor System

EOD mapping

Additional PO line reference field	-	subfield	-
Vendor Reference Number field	035	subfield	a
Fund distribution field	981	subfield	b
Vendor invoice number field	980	subfield	f



## EOD: Testing and Implementation



MARC file import tests

EOD file import tests

Accurate matching  
checked

Daily EOD file delivery

EOD implemented in  
Alma Production



## EDI: Library Set Up

EOD in place

Liaise with ProQuest re: Institution /  
Vendor details

Set up EDI details in Alma Vendor  
Account

Test FTP and EOD / EDI Files





# EDI: Alma Vendor Information - ProQuest

Alma ★ » Acquisitions Resources Fulfillment Admin Analytics IRT Acquisitions Department ▼ 👤 📧 ⚙️ ?

< Vendor Details Cancel Save

Proquest Information and Learning i ▼

Vendor code UMI Institution University of South Australia

Summary Contact Information **Contact People** EDI Information Usage Data Invoices PO Lines Communications Attachments

Notes Analytics

Vendor EDI Attributes ▼

EDI code	<input type="text" value="7801297"/>	EDI type *	<input type="text" value="31B - US-SAN"/>	EDI naming convention *	<input type="text" value="Standard"/>	EDI vendor format *	<input type="text" value="Other"/>
Incoming	<input checked="" type="checkbox"/> Incoming <input type="checkbox"/> Shelf Ready	Outgoing	<input type="checkbox"/> POs <input type="checkbox"/> Claims				
Parameters		<input type="checkbox"/> Order Cancellation					

Input Job Parameters ▼

JOB SCHEDULING

Status  Active  Inactive

Schedule  ▼ Run Now



# EDI: Alma Vendor Information - ProQuest

S/FTP connection ▼

Description	FTP Information for EDI of current Vendor		
Max. Number of Files	<input type="text" value="1"/>	Max. file size	<input type="text" value="1"/>
Server *	<input type="text" value="meta.ebib.com"/>	Port *	<input type="text" value="21"/>
Input directory	<input type="text" value="EDI"/>	Output directory	<input type="text" value="orders"/>
Max. file size	<input type="text" value="GB"/>	Allow Navigation	<input checked="" type="checkbox"/>
FTP mode	<input type="text" value="Binary"/>	Send command	<input type="text" value="Append"/>
FTP Passive Mode	<input type="checkbox"/>	<input type="button" value="Test FTP"/>	
Ftp Server Secured	<input type="checkbox"/>	Password	<input type="password" value="....."/>
UserName	<input type="text" value="unisa"/>		





# EDI Testing and System Adjustments

61586453

<b>Unique invoice identifier</b>	254102891440001831	<b>Owner Status</b>	RTS/ADMIN Pending	<b>Vendor</b>	UMI
<b>Approved by</b>	- (-)	<b>Total amount</b>	7,630.64 USD		
<b>Total invoice lines amount</b>	7,630.64 USD				

- Summary
- Alerts
- Invoice Lines
- History
- Notes
- Attachments

1 - 20 of 50

Status: All Type: All

Line #	Type	Price	Total Price	VAT Note	Status	Description	Funds	Note	PO Line #
1	1	Reg... 183.15 USD	183.15 USD	Approximat... 0.00 included in line Total Price.	In-Rev...	Georgian gothic : medievalist architecture, furniture and interiors, 1730-1840 / Peter N. Lindfield.	PPD Proquest PDAPPD (100.0%) (FY-2018)	Unit price : 183.15 ...	POL-42220 (Waiting for Invoice)/
2	2	Reg... 264.00 USD	264.00 USD	Approximat... 0.00 included in line Total Price.	In-Rev...	Professional leadership for social work practitioners and educators / Anna Fairtlough.	PPD Proquest PDAPPD (100.0%) (FY-2018)	Unit price : 264.00 ...	POL-42258 (Waiting for Invoice)/
				Approximat... 0.00 included		Theorizing digital divides / edited by	PPD Proquest PDAPPD	Unit price :	POL-42244

# EDI Testing and System Adjustments

001	9915936114401831
005	20151223094214.0
006	m d
007	cr -n-----
008	150629s2013      s       eng d
020	__ a 9781475801088  c 38.99 (UA)
035	__ a EBL1126497

001	9916193067101831
005	20180501132609.0
006	m o d
007	cr cnu
008	180212t20172001enka ob 001 0 eng d
020	__ z 9780765806260
020	__ a 9781351309516 (e-book)
035	__ a (MiAaPQ)EBC5219075





## Integrated Alma ProQuest EOD and EDI process

- Repository record loads
- EOD – orders matched to bib records
- Orders approved
- EDI – orders lines matched to invoices
- Invoices approved
- Integrated EOD/EDI = Workflow efficiencies



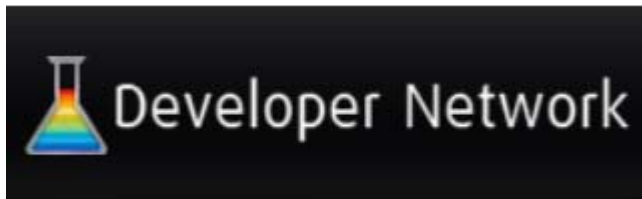


# ProQuest: EOD and EDI Set Up Work





# Alma Developers



Ex Libris Developer Network / Alma / Integrations / EDI

<https://developers.exlibrisgroup.com/alma/integrations/edi>

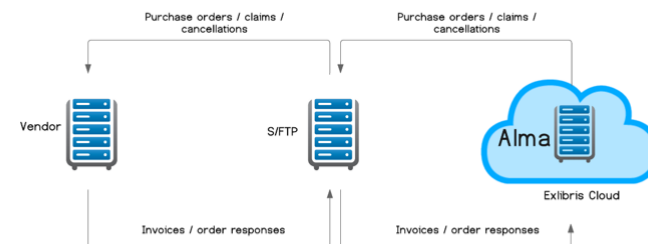
## EDI integration in Alma

Electronic Data Interchange (EDI) is a method of communication between an institution and its vendors. Alma supports the [EDIFACT](#) standard, which is managed by [EDIEUR](#).

The following workflows are supported:

- From Alma to vendor: [Purchase orders, Claims, Cancellations](#)
- From vendor to Alma: [Invoices, Order Responses](#)

The EDI based communication between Alma and the vendor is done using a FTP location in which EDI files are placed and fetched for processing. This is illustrated in the following diagram:



EDI communication has successfully verified with the following vendors:

- Baker & Taylor
- Coutts ([ingramcontent](#))
- Dawson
- EBSCO
- [Harrassowitz](#)
- LM Information Delivery
- Midwest Library Service
- ProQuest [Ebook Central](#)
- [Taldan](#)
- WT Cox Information Services
- YBP

Alma

Home » Alma » Product Documentation » Alma Online Help (English) » Integrations with External Systems » Upload Electronic Holdings from ProQuest Ebook Central

## Upload Electronic Holdings from ProQuest Ebook Central



◀ Upload Electronic Holdings from Elsevier | Setting Up OAI Integration ▶

- Table of contents
- 1. Working with the Alma Ebook Central Integration
- 2. Creating an Ebook Central Integration Profile
- 3. Viewing the Job Report
- 4. Viewing Purchase Order Information



**PERMISSIONS:** To configure an integration profile, you must have the following role:

- General System Administrator

**Important** It is recommended that you test this capability in your sandbox prior to implementing it in your production environment.

## Acknowledgements:

Jenny Quilliam [jenny.quilliam@unisa.edu.au](mailto:jenny.quilliam@unisa.edu.au)

Ann-Marie Breaux [abreaux@ebSCO.com](mailto:abreaux@ebSCO.com)

Vinay Bharadwaj [Vinay.Bharadwaj@proquest.com](mailto:Vinay.Bharadwaj@proquest.com)

Alma Developers <https://developers.exlibrisgroup.com/>

ExLibris Knowledge Center <https://knowledge.exlibrisgroup.com/>

Chris Oaten, photographer of images on Slides 21 and 27

