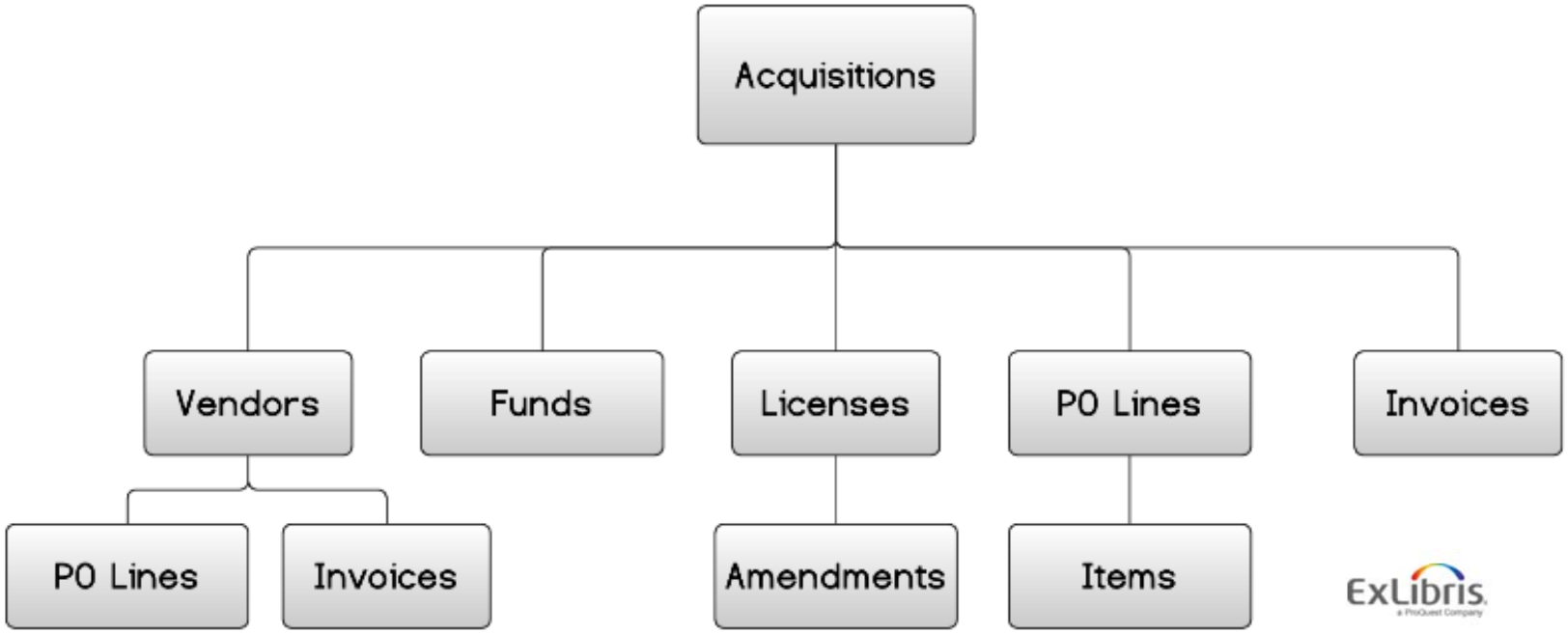
GOBI and E-book Central API integration with Alma

Anthony Abela, Acquisitions Librarian

ANZREG 2018

UniSA

Alma API



ExLibris
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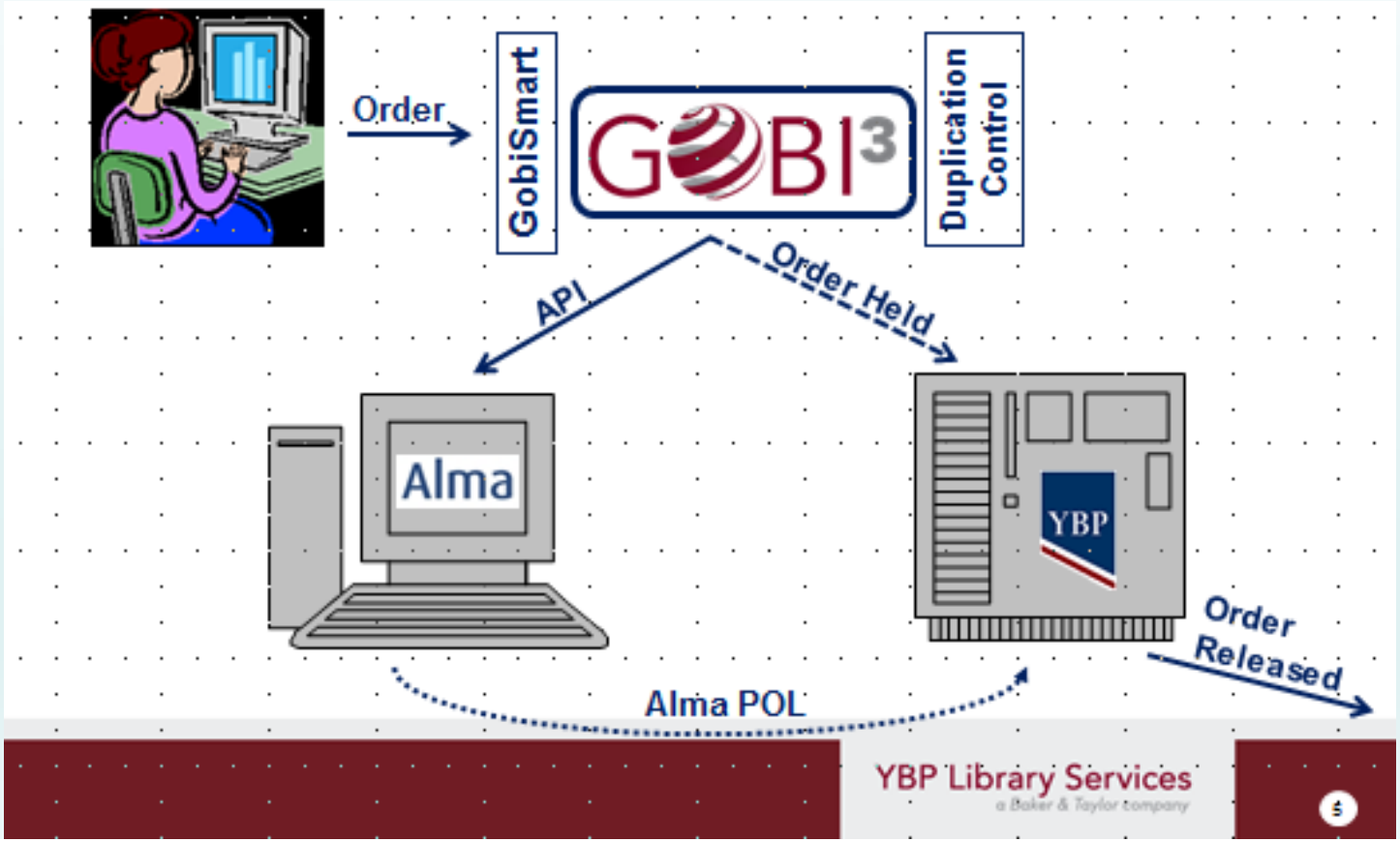
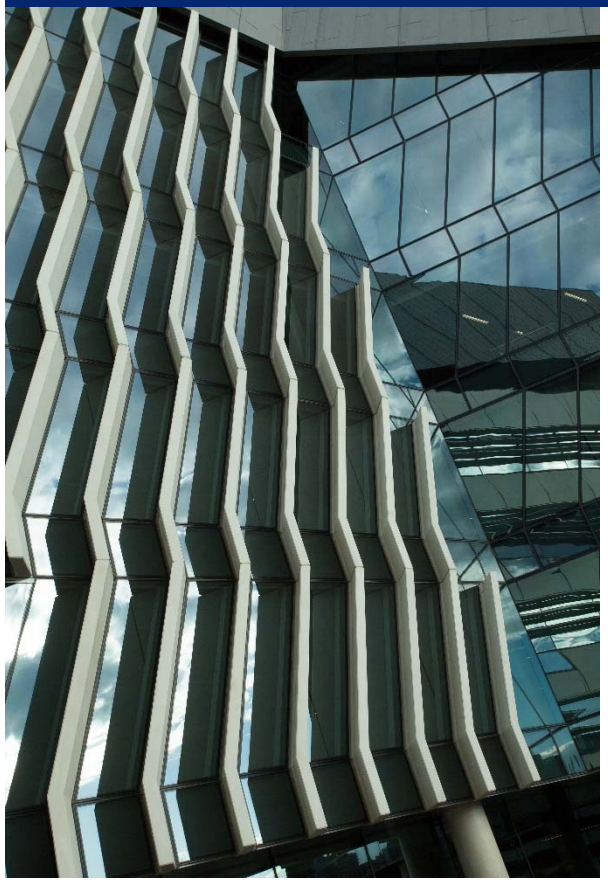
Developer Network

GOBI Real Time Acquisitions (RTA) Service Overview



GOBI Real Time Acquisitions Workflow

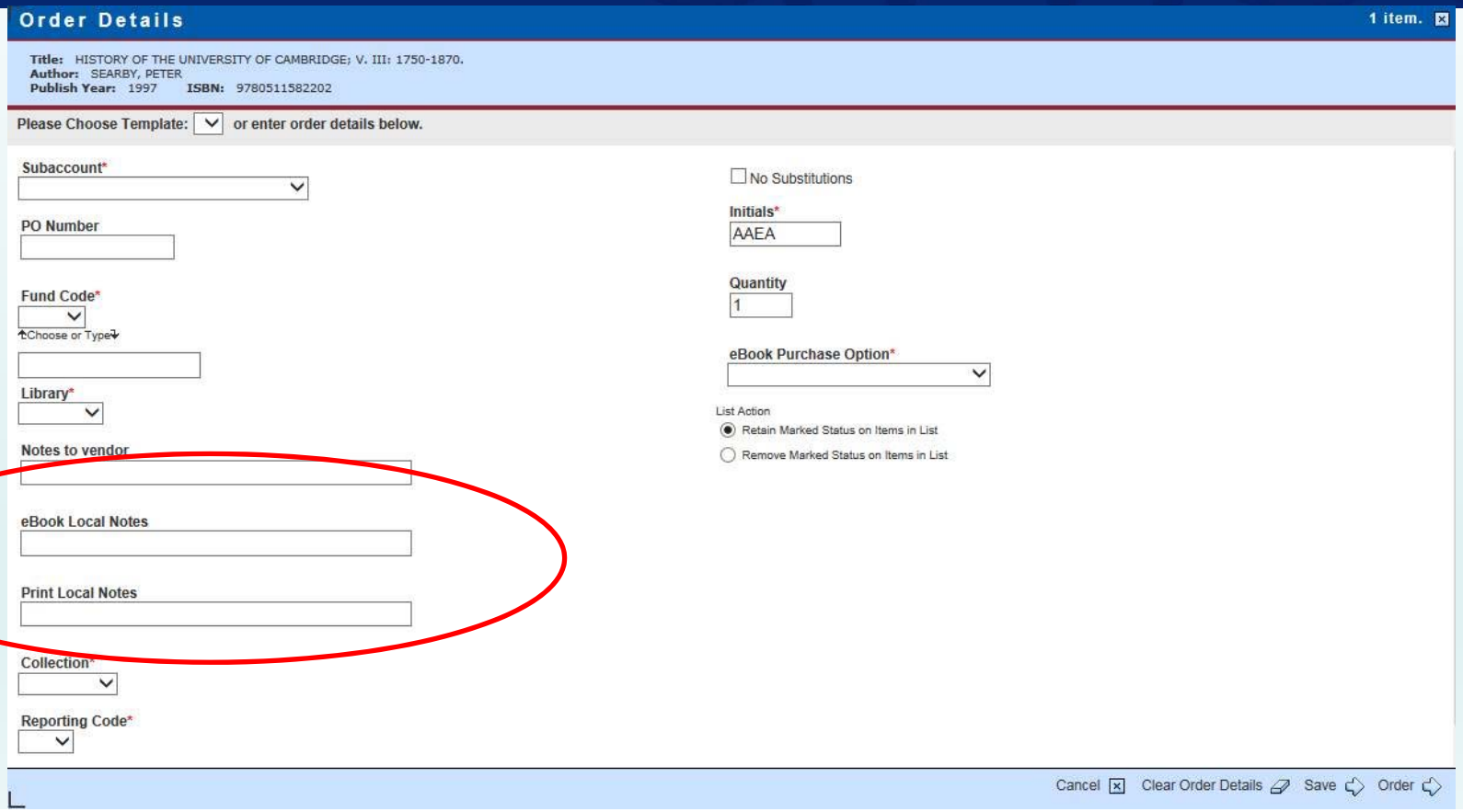


GOBI Real Time Acquisitions replaced GOBI orders/EOCRS or GobiExport/EDI ordering.

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)



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			547920	
Order	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 (mccullaj).
Print Local Notes:
Collection: TSBOO
Reporting Code: EB
Supplier: JSTOR
Purchase option: Unlimited User Access

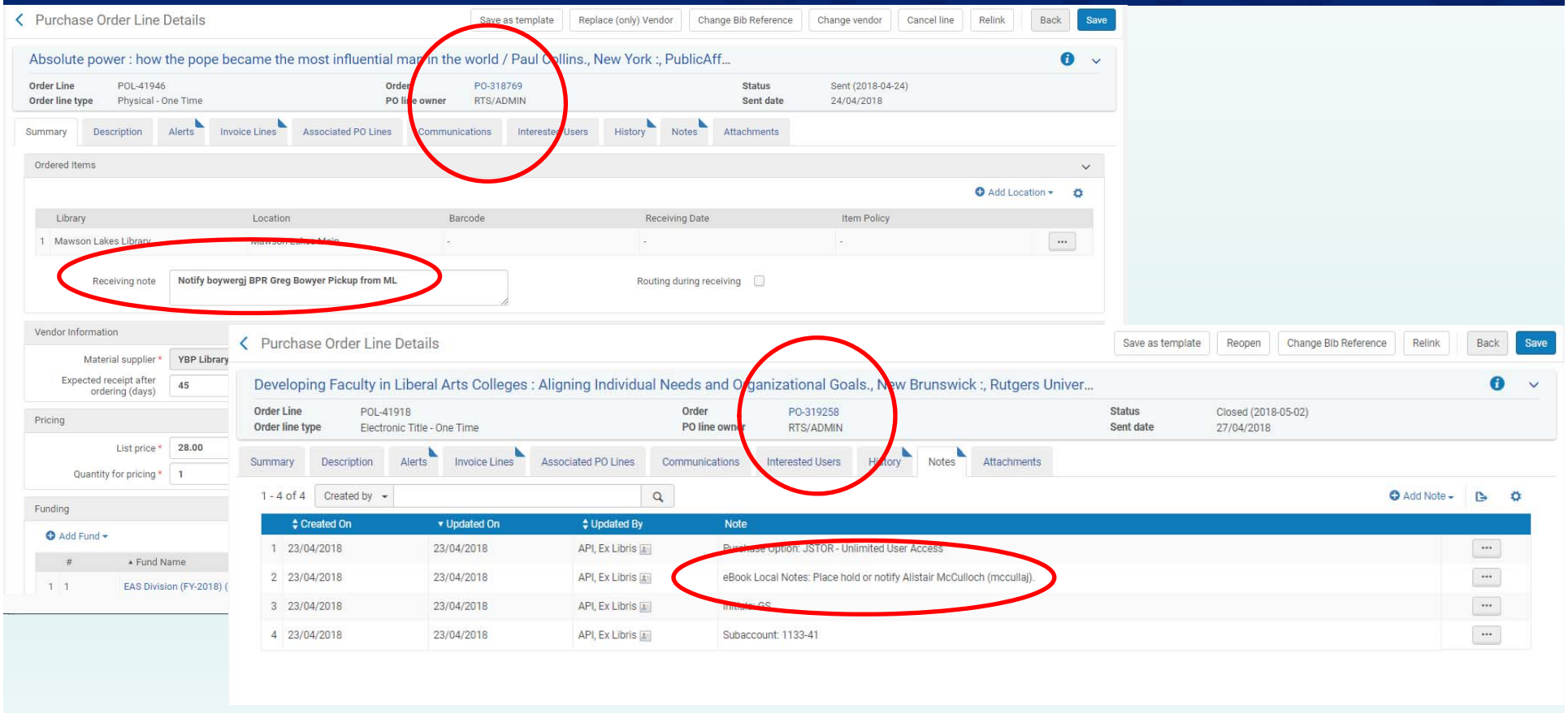
Title: ABSOLUTE POWER: HOW THE POPE BECAME THE MOST INFLUENTIAL MAN IN THE WORLD.
Author: COLLINS, PAUL
Pub Year: 2018
ISBN: 9781610398602
Binding: Cloth

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			561145	6428387383
Order	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



Alma Bibliographic Records

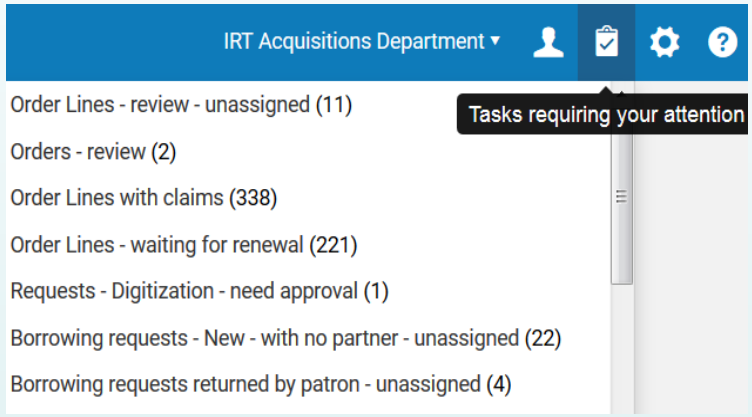
ROUTLEDGE HISTORY OF DISABILITY

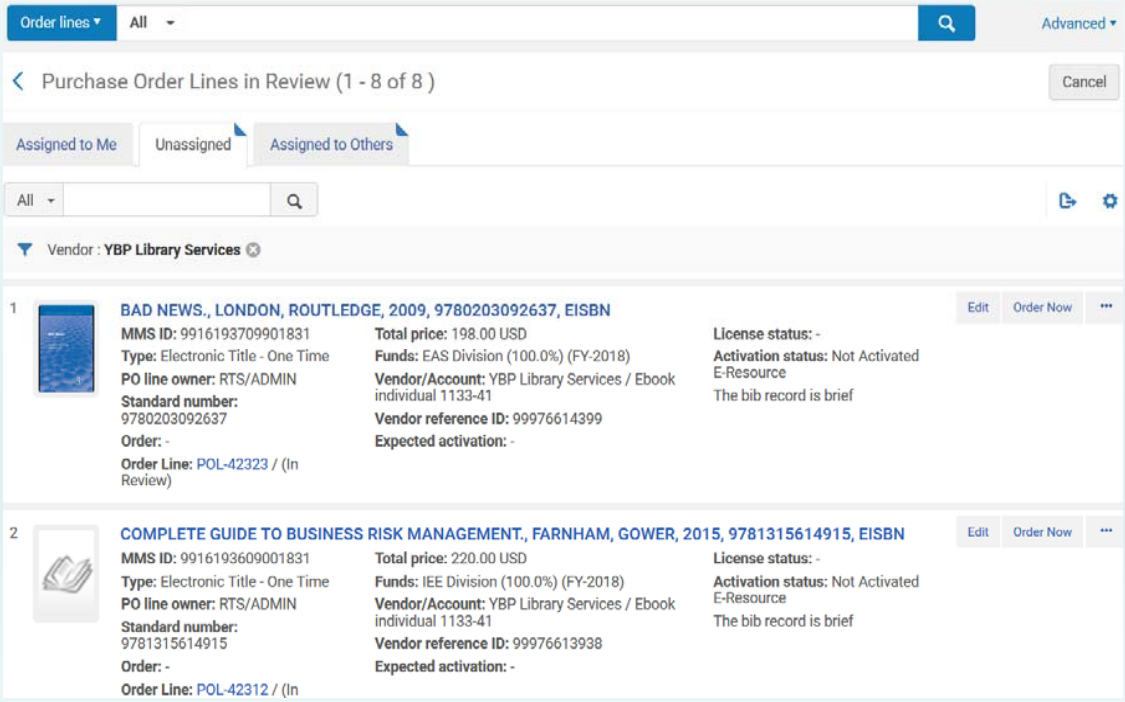
MMS ID	9916193711001831	**Suppress from publishing**	No	**Export to WorldCat**	Don't publish
Export to Libraries Australia	Don't publish	**Brief level**	01	**Record format**	marc21
Originating system	NEW_ORDER_API	**Originating system ID**	9916193711001831	**Originating system version**	-

MARC | BIBFRAME

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

Alma RTA Order Lines





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

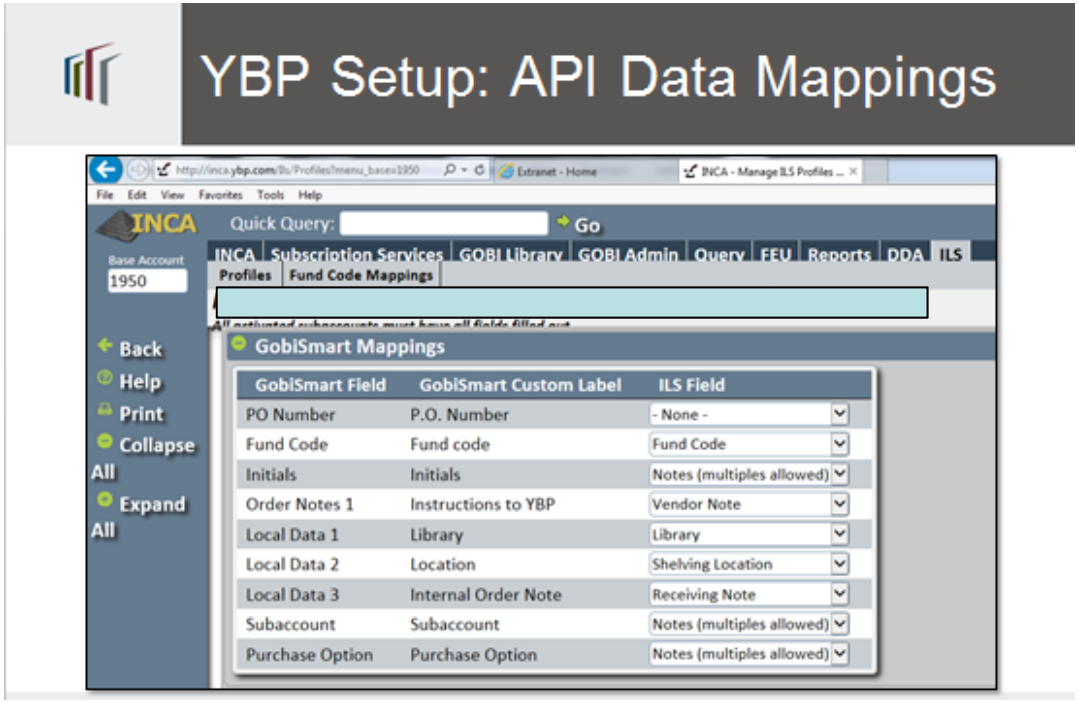
Set up work: YBP

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



UniSA

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

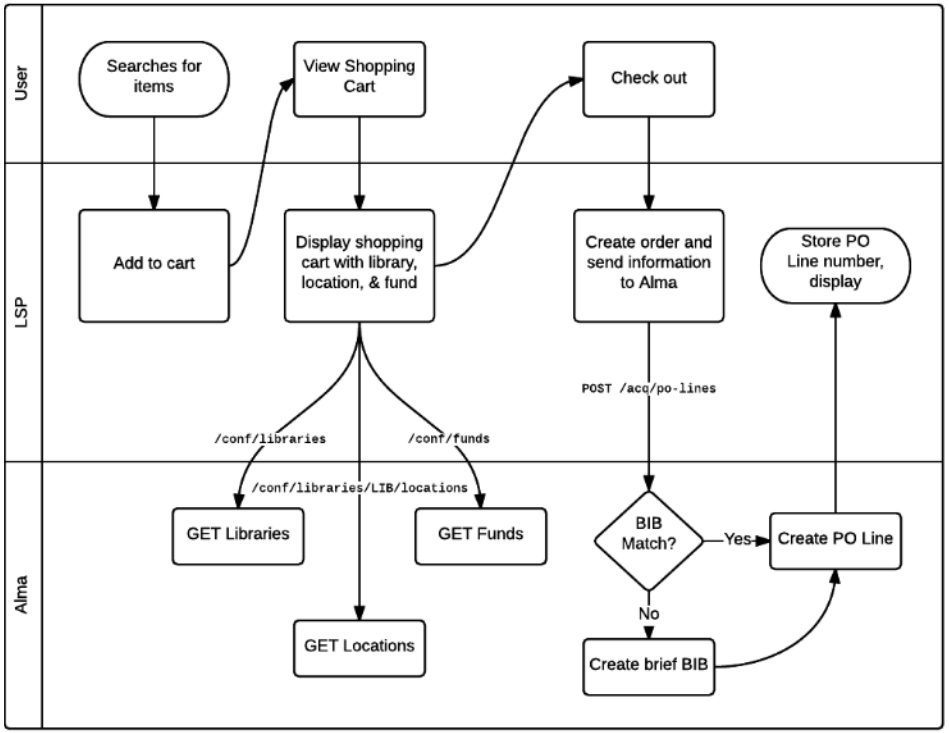
Real-time acquisitions is an integration between ExLibris Alma and Academic Library Service Providers, to streamline acquisitions workflows. It incorporates standard ordering and loading technologies with APIs to speed the availability of resources, increase the efficiency of integrating records, and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

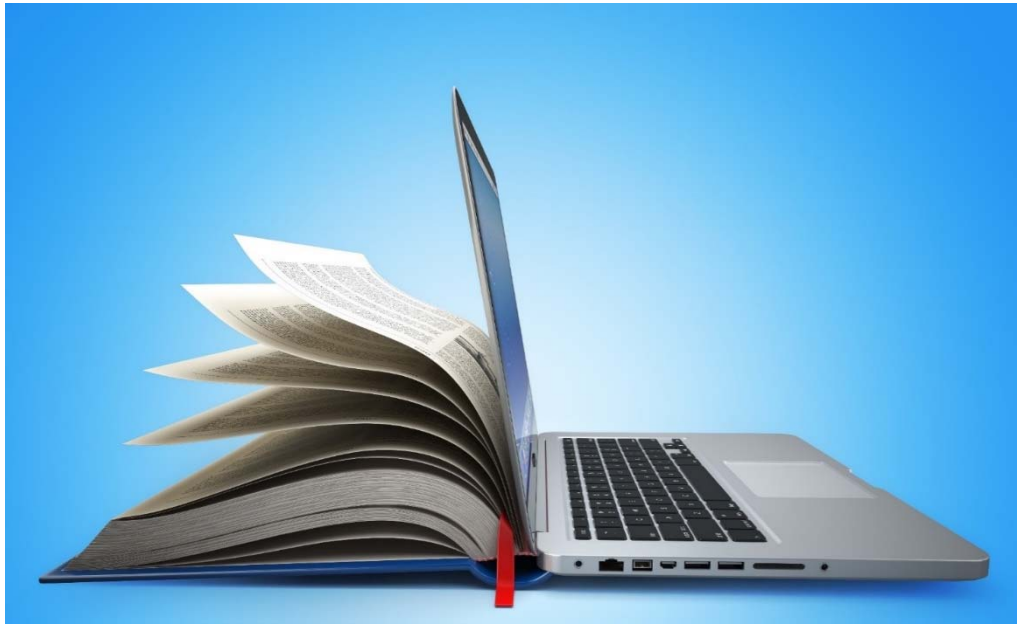
Limitations

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

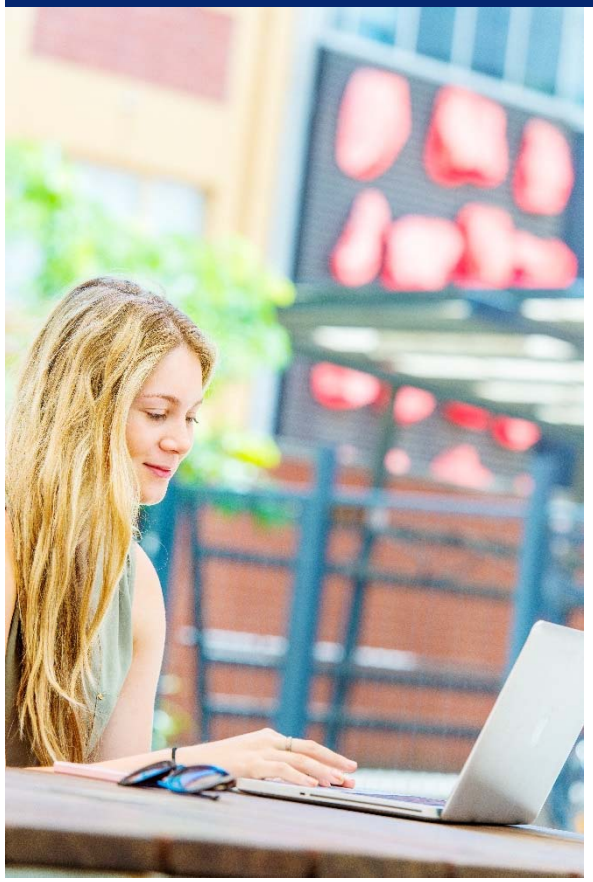
Real-time duplication check against Alma when ordering in GOBI

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)**
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

Portfolio List (64583)

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	233555503710001831	Acti	ProQuest PDA Repository	ProQuest PDA Import Repository as part o...	PDA Repository	-	...
2	233555503720001831	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

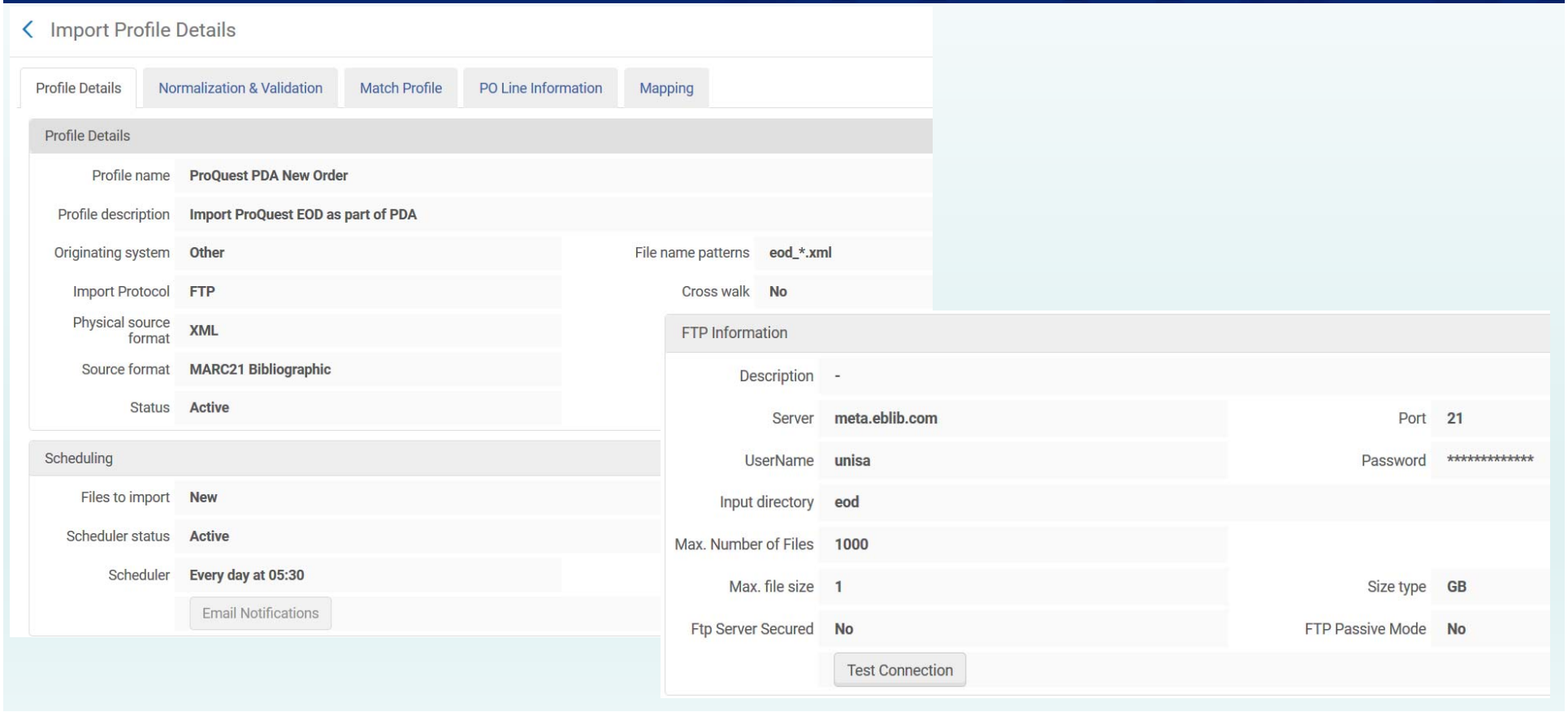
Inventory Operations

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



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	**Proquest Information and Learning**	Vendor account	**Proquest Information and Learning**
PO Line currency	**USD**	Decimal point location	**2**
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

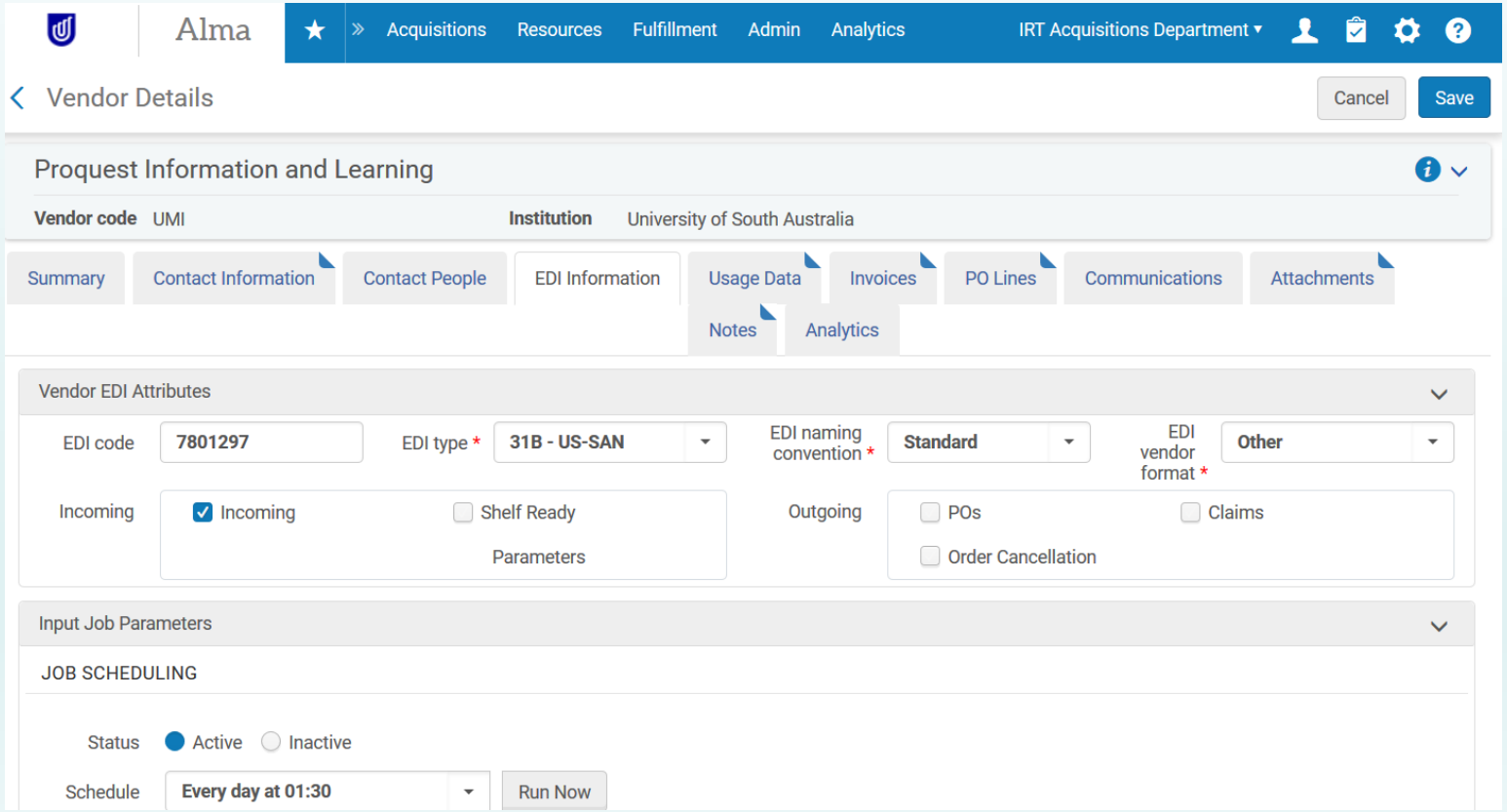
EOD in place

Liaise with ProQuest re: Institution / Vendor details

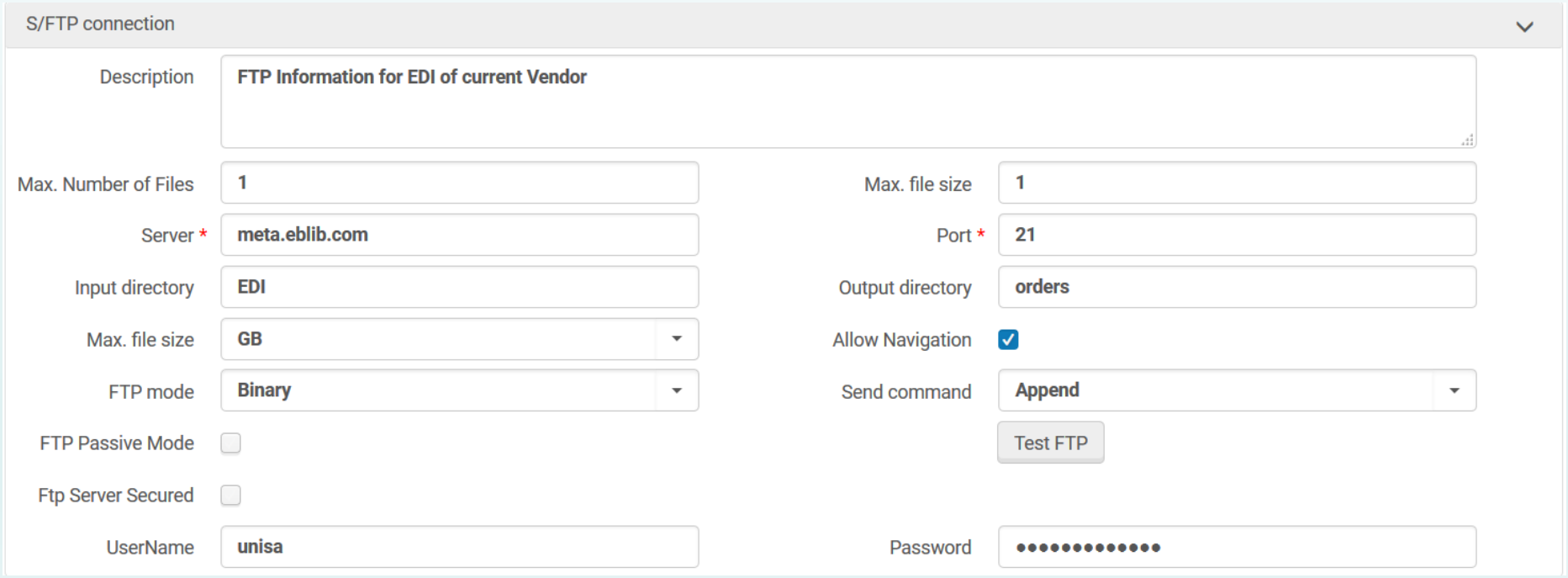
Set up EDI details in Alma Vendor Account

Test FTP and EOD / EDI Files

EDI: Alma Vendor Information - ProQuest



EDI: Alma Vendor Information - ProQuest



EDI Testing and System Adjustments

61586453

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

Summary | Alerts | Invoice Lines | History | Notes | Attachments

1 - 20 of 50

Status : **All** Type : **All**

	Line #	Typ	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

1 of 3

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

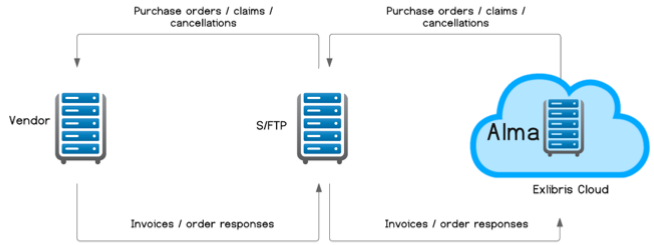
EDI integration in Alma

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

The following workflows are supported:

- From Alma to vendor: Purchase orders, Claims, Cancellations
- From vendor to Alma: Invoices, Order Responses

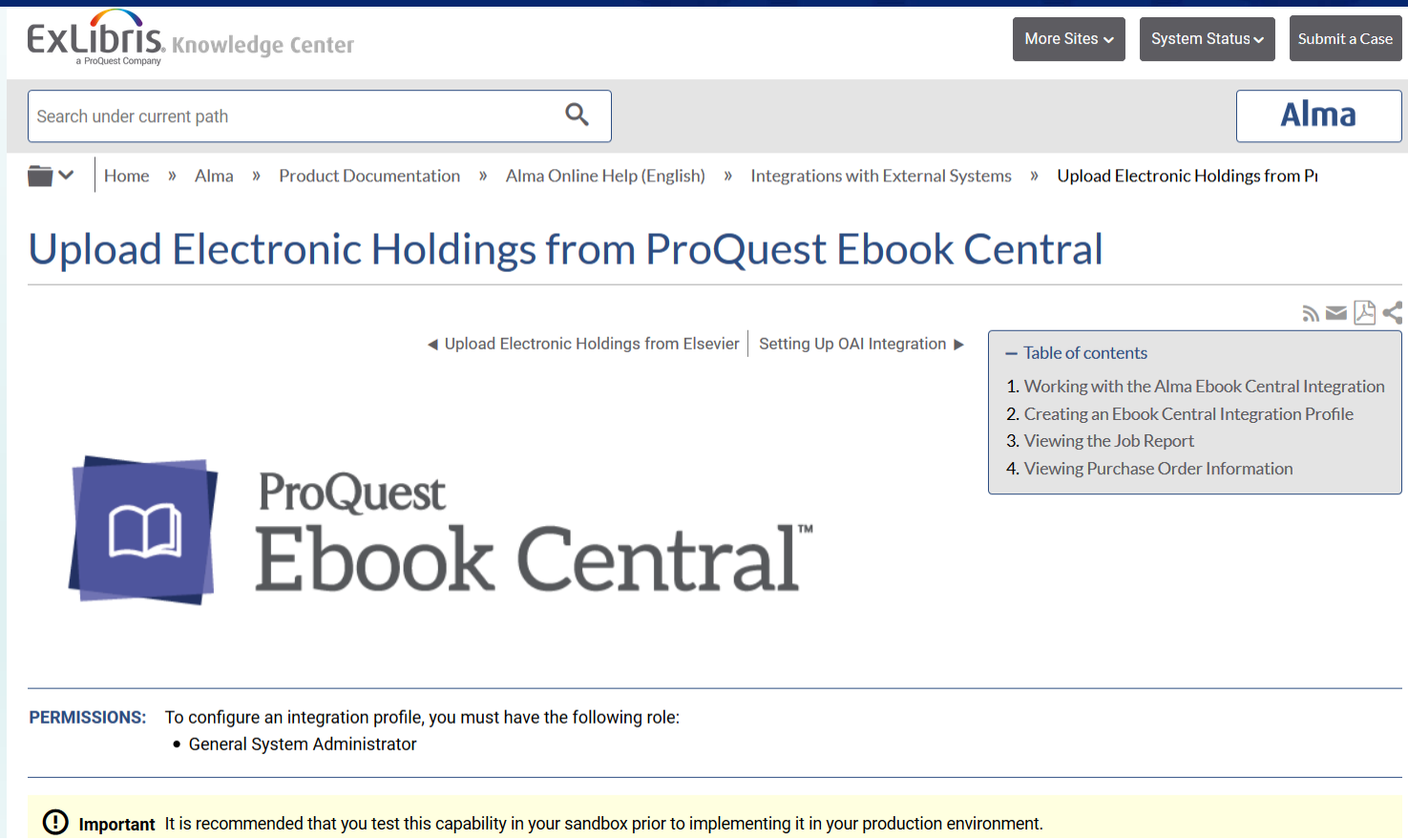
The EDI based communication between Alma and the vendor is done using a FTP location in which EDI files are placed and fetched for processing. This is illustrated in the following diagram:



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
- Teldan
- WT Cox Information Services
- YBP

Future Enhancements



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Alma

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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

ProQuest Ebook Central™

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.

Questions

Acknowledgements:

Jenny Quilliam jenny.quilliam@unisa.edu.au

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Vinay Bharadwaj Vinay.Bharadwaj@proquest.com

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Chris Oaten, photographer of images on Slides 21 and 27