

# Alma PDA

ANZREG Alma Best Practice Day 2016

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Scope:

Patron Driven Acquisitions (PDA) with EBL

Evidence Based Acquisitions (EBA) with Wiley,  
Cambridge

# Workflow Outline – PDA

1. Establish PDA profile
2. Create local PDA electronic collection
3. Create and edit PDA
4. Create, edit and manage import profile
5. Load EOD file
6. Manage invoices
7. Move purchased titles from local to main EBL collection
8. Pause PDA program



Who does the work?

Acquisitions Coordinator (HEO7) – profile definition

Acq Monos Librarian (HEO6) – Setup, pausing, management, batch moves

Library Officers, Monos team (HEO4) – orders, invoicing.

# What works well?

The screenshot shows the Alma interface for PDA Details. At the top, there is a navigation bar with the Alma logo, a search bar, and tabs for Tasks, Analytics, and Currently a. Below this, the page title is "PDA Details". A notification banner states: "PDA Program:ProQuest PDA, has reached amount of: 38334.85 which is more than: 85.0 % of its budget threshold." Below the notification, a table header shows "Name ProQuest PDA" and "Creation Date 10/06/2015". There are three tabs: "Summary", "Attachments", and "Notes". The "Summary" tab is active, displaying a form with the following fields:

Name *	ProQuest PDA
Status *	Paused
Start Date *	Active
Access Threshold	Cancelled
Alert Percentage	Draft
Contact has been notified	Paused
License	

# Issues: Problems resolved during initial workflow setup

**Import Profile Details**

Profile Type: PDA New Order Profile name: \_\_\_\_\_

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 File name patterns: eod\_\*.xml

Import Protocol: FTP Cross walk:  No  Yes

Physical source format: XML Target format: MARC21 Bi

Source format: MARC21 Bibliographic

Status: Active

**Scheduling**

Files to import:  All  New

Scheduler status:  Active  Inactive

Scheduler \* Not scheduled Email Notifications

**FTP Information**

Description: \_\_\_\_\_

Server: meta.ebllib.com Port: 21

UserName: unisa Password: ●●●●●●

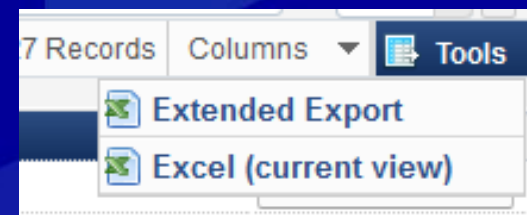
## Issues: No EDI with ProQuest

Process requires PDA orders to be approved, an invoice to be manually created and PO lines added to Alma invoice

Solution: ProQuest to develop EDI functionality in new Ebook Central platform

# Issues: Moving titles between local electronic collections

- Individually – remove and reattach
- Batches - Extended Export, edit file to keep only the portfolios being moved



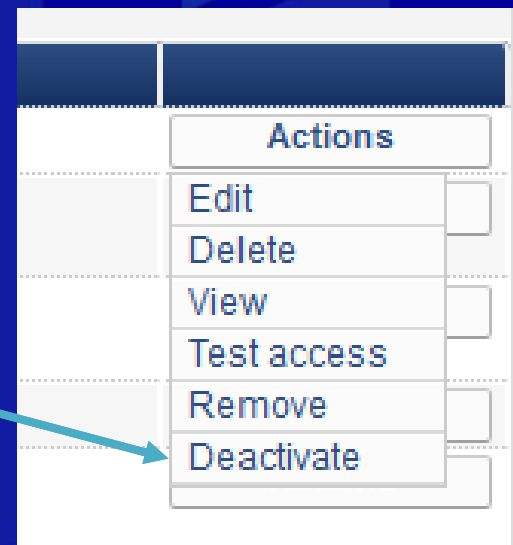
- Locate target collection and do an incremental load of transferred portfolios
- Check results, and then run delete on PDA collection



# Issues: Moving titles between local electronic collections

- Suggestion: Additional drop down option on Local Electronic Collection > Edit Service > Portfolio Actions

Remove and attach to another collection



# Wiley EBA

- Provides entire collection for set access fee based on FTE tiers.
- End of access period, perpetual access titles are selected to value of initial fee. Usage data is provided.
- Not managed as PDA in Alma – could it be?

Institution Name	University of South Australia										
UBCM Usage Report											
Book Title	ISBN	Grand Tot	January	February	March	April	May	June	July	August	September
Children and Play	9781444311006	2,542	0	126	291	265	41	105	60		
Media Literacies: A Critical Introduction	9781444344158	434	0	0	144	10	0	16	0		
The Wiley-Blackwell Handbook of Childho	9781444325485	341	0	0	4	15	56	16	1		
Project Scheduling and Management for C	9781118779552	299	0	15	223	1	2	14	0		
Big Data, Big Analytics: Emerging Business	9781118562260	256	0	0	19	9	14	51	19		
Essential Readings in Light Metals: Alumir	9781118647868	190	0	0	0	1	0	0	27		
PACS and Imaging Informatics: Basic Princ	9780470560525	181	0	0	0	2	0	2	0		
An Introduction to Fire Dynamics, Third Ed	9781119975465	180	0	1	11	23	13	0	3		
Solar Engineering of Thermal Processes, F	9781118671603	177	0	0	59	48	0	0	0		
An Introduction to Critical Thinking and Cr	9781118033449	161	0	2	5	1	1	0	0		
Corporate and Project Finance Modeling:	9781118957394	160	0	0	0	0	0	0	0		
Handbook of Human Factors and Ergonom	9781118131350	153	0	0	75	2	8	5	0		
Rook's Textbook of Dermatology, Eighth Ed	9781444317633	152	0	25	18	89	9	5	1		
The Wiley Guide to Managing Projects	9780470172391	144	0	0	9	10	6	63	0		
Intercultural Language Teaching and Lear	9781118482070	143	0	0	24	27	2	0	0		

Questions?



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