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## PDA & EDI: Will They Find Each Other and Find Love?

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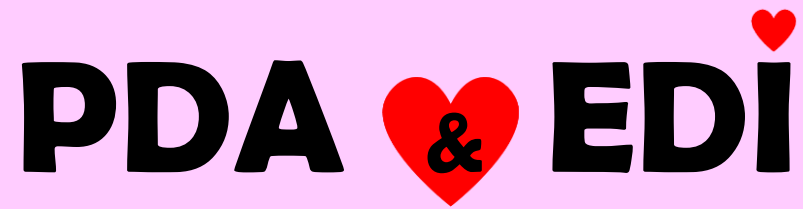
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Will They Find Each Other and Find Love?

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# DEFINITIONS ❤️

## EDI

Electronic data interchange



Transfer of business documents, in this case invoices, virtually via standardized data.

## PDA

Patron Driven Acquisitions

Titles are made available and when a particular title has been accessed a certain number of times, a purchase is triggered.

# SEVERAL WAYS OF DOING PDA

eBook Central Integration Profile

eBook Central CZ collections

Alma's PDA functionality

New Order API

Import Profiles

# DATING PROFILE: PDA

## LIKES

- Reliability
- Accuracy
- Spontaneity

## DISLIKES

- Being tied down

## ABOUT

- Flaky

# DATING PROFILE: EDI

## LIKES

- Reliability
- Accuracy

## ABOUT

- Type A personality
- Favorite color green

## DISLIKES

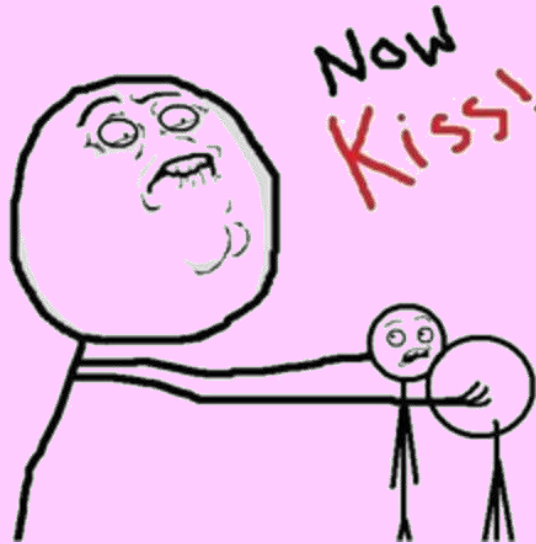
- Indecision

```
UNA:+. ?
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:EAN008'BGM+380+965548'DTM+137:20190326:102'CUX+2:USD:4'ALC+C+++DL::28:Fre
ight Charges'MOA+8:1'LIN+1++9781640090675:EN'IMD+L+050+:::TOMB OF THE
UNKNOWN RACIST?: A NOVEL'IMD+L+050+:::'IMD+L+010+:::BOYD, BLANCHE M.,
1945-
'IMD+L+110+:::BERKELEY'QTY+47:1'MOA+203:21.84'PRI+AAB:26'PRI+AAA:21.84'RFF+
SLI:40028939788'LIN+2++9781611178821:EN'IMD+L+050+:::VAIN CONVERSATION?: A
NOVEL.'IMD+L+010+:::GROOMS,
ANTHONY'IMD+L+110+:::COLUMBIA'QTY+47:1'MOA+203:23.51'PRI+AAB:27.99'PRI+AAA:
23.51'RFF+SLI:40028886065'LIN+3++9781616208776:EN'IMD+L+050+:::AMERICAN
MARRIAGE?: A NOVEL.'IMD+L+010+:::JONES, TAYARI'IMD+L+110+:::CHAPEL
HILL'QTY+47:1'MOA+203:26.95'PRI+AAB:26.95'PRI+AAA:26.95'RFF+SLI:40028886066
'UNS+S'CNT+1:3'CNT+2:3'MOA+9:73.3'MOA+79:72.3'UNT+40+481'UNZ+1+308'
```

# INITIAL ATTRACTION

## DDA

- Reliability
- Accuracy
- Spontaneity



## EDI

- Reliability
- Accuracy

...BUT...

# IT'S COMPLICATED...

- Migration
- PDA administration
- Alma configuration

Married	▼
Single	
In a relationship	
Engaged	
Married	
In a civil union	
In a domestic partnership	
In an open relationship	
It's complicated	
Separated	
Divorced	
Widowed	
---	



# IT'S COMPLICATED...

- **Migration**
  - Old cataloged records
  - Ebrary records
  - Updating GOBI
- PDA administration
- Alma configuration

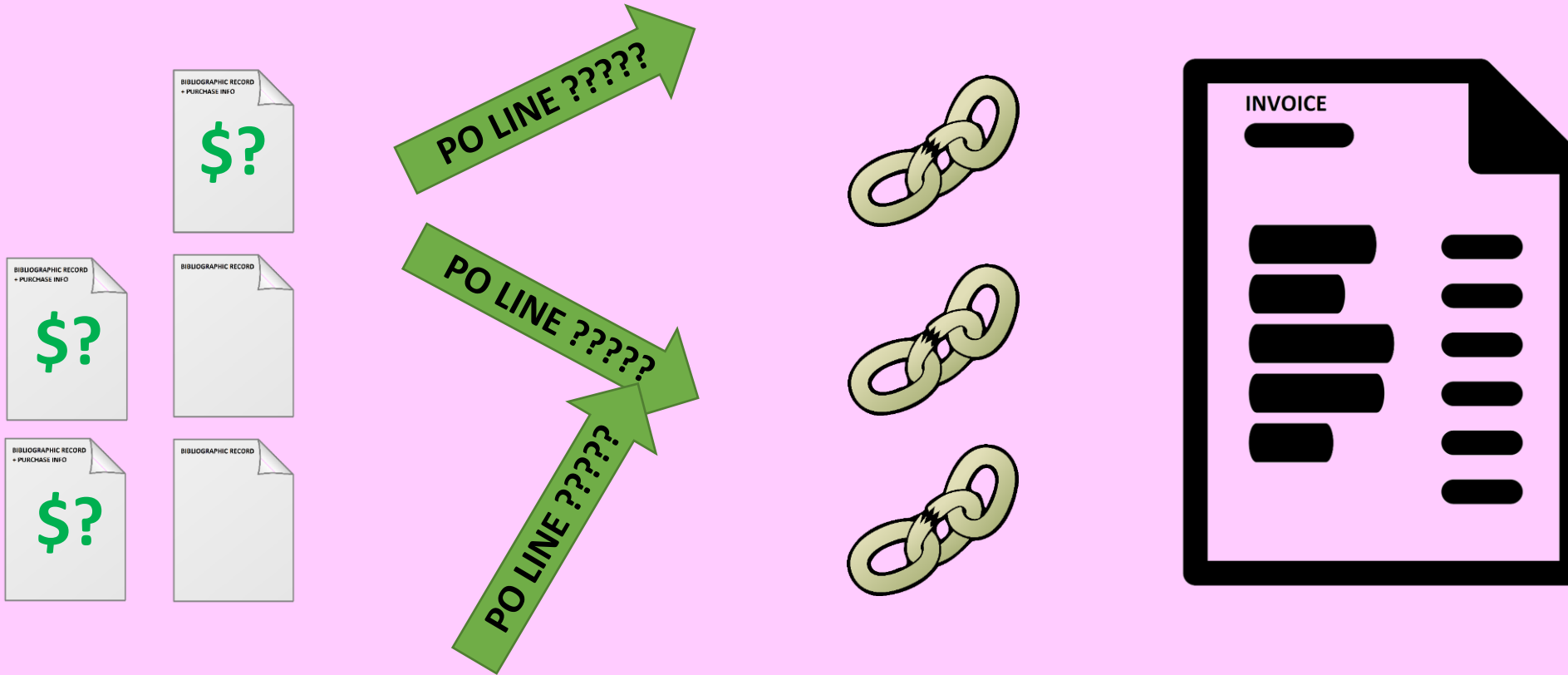
# IT'S COMPLICATED...

- Migration
- **PDA administration**
  - **Acquisitions vs. ERM**
  - **GOBI vs. ProQuest**
- Alma configuration

# IT'S COMPLICATED...

- Migration
- PDA administration
- **Alma configuration**
  - Funds and reporting codes
  - EDI code
  - Timing

# WHAT WENT WRONG



# HOW (AND WHERE) DO WE FIX IT?

- Vendor profile
- Bibliographic records
- Import profile(s)
- Funds & reporting codes

# HOW (AND WHERE) DO WE FIX IT?

- **Vendor profile**
  - EDI code
  - Scheduling
- Bibliographic records
- Import profile(s)
- Funds & reporting codes

# EDI CODE

GOBI

Vendor code

QYANKEE

Summary

Contact Information

Cont

Attachments

Notes

Analytics

Vendor EDI Attributes

EDI code

♥♥♥♥♥

S/FTP connection

▼

Description

FTP Information for EDI of current Vendor

Max. Number of Files

1

Max. file size

1

Server \*

ftp.ybp.com

Port \*

21

Input directory

almainvoice

Output directory

Almadrop

Max. file size

GB

Allow Navigation

☒

FTP mode

Binary

Send command

Append

FTP Passive Mode

☐

Test FTP

Ftp Server Secured

♥♥♥♥♥

Password

.....

UserName

westmichigan

# SCHEDULING

## INVOICES

Input Job Parameters

JOB SCHEDULING

Status

☒ Active

☐ Inactive

Schedule

Every day at 19:00

▼

Run Now

Email Notification

## BIBLIOGRAPHIC RECORDS

Scheduling

Files to import

☐ All

☒ New

Scheduler status

☒ Active

☐ Inactive

Scheduler \*

Every day at 12:00

▼

Email Notifications



# HOW (AND WHERE) DO WE FIX IT?

- Vendor profile
- **Bibliographic records**
  - Custom match point
  - Fund information
  - Price
  - Invoice number
  - Vendor reference number
- Import profile(s)
- Funds & reporting codes

# BIBLIOGRAPHIC RECORDS

Vendor Reference Number	024   a
List price	980   e
Fund distribution	981   a
Reporting code	981   c
Vendor invoice number	980   f
Match point	035   a

035	__   a (DDA)ebc4688939
980	__   e 95.00   f 938259
981	__   a WMNS 4874   c WMNS-AP

# HOW (AND WHERE) DO WE FIX IT?

- Vendor profile
- Bibliographic records
- **Import profile(s)**
  - Discovery record files
  - Purchase record files
  - Delete files
- Funds & reporting codes

# IMPORT PROFILE(S)

## Discovery Records

- GOBI puts custom 035
- Scheduled daily

# IMPORT PROFILE(S)

## Purchase Records

- Match Profile
- PO Line Information
- Scheduled daily

Match Profile			
Match by Serial / Non Serial <input checked="" type="radio"/> Yes <input type="radio"/> No			
Serial match method	<div>035 (Other System Identifier) Match Method</div>	System Identifier Prefix	DDA
Non Serial match method	<div>035 (Other System Identifier) Match Method</div>	System Identifier Prefix	DDA

# BIBLIOGRAPHIC RECORDS

Vendor Reference Number    024 | a  
List price                      980 | e  
Fund distribution              981 | a  
Reporting code                981 | c  
Vendor invoice number        980 | f  
Match point                    035 | a

035	__  a (DDA)ebc4688939
980	__  e 95.00  f 938259
981	__  a WMNS 4874  c WMNS-AP

# IMPORT PROFILE(S)

## Delete Records

- Download via ProQuest
- Make changes with MARCEdit to create the match point
- Run manually

# HOW (AND WHERE) DO WE FIX IT?

- Vendor profile
- Bibliographic records
- Import profile(s)
- **Funds & reporting codes**
  - Volume
  - GOBI ordering



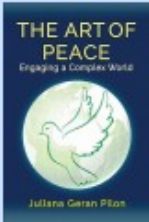
# FUND/REPORTING CODES

Configuration Menu > Acquisitions > Purchase Orders > Reporting Codes

<b>Purchase Orders</b>  Reporting Codes  Secondary Reporting Codes  Tertiary Reporting Codes	ACTY	Accountancy	Accountancy
	ACTYa	Accountancy Approvals	Accountancy Approvals
	ACTY-AP	Accountancy Auto Purchase	Accountancy Auto Purchase
	ACTYe	Accountancy Electronic	Accountancy Electronic
	ACTYf	Accountancy Forms	Accountancy Forms
	ACTYp	Accountancy Purchase Orders	Accountancy Purchase Orders
	ACTYr	Accountancy Replacements	Accountancy Replacements
	ACTYv	Accountancy Videos	Accountancy Videos

# FUND/REPORTING CODES

**Order Details** 1 item.



**Title:** ART OF PEACE: ENGAGING A COMPLEX WORLD.  
**Author:** PILON, JULIANA GERAN  
**Publish Year:** 2016    **ISBN:** 9781412864442

Please Choose Template: ▼ or enter order details below.

**Subaccount\***  
▼

**PO Number**

**Fund Code\***  
▼  
↑ Choose or Type ↓

**PSClf**

**Library\***  
▼




**Note to YBP**

☐ No Substitutions

**Initials**

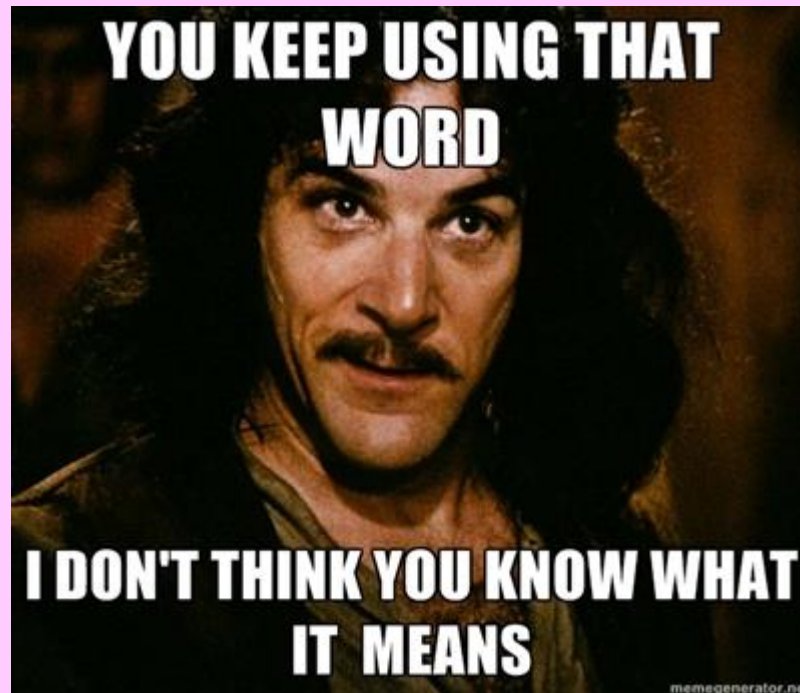
**Quantity**

List Action  
☐ Retain Marked Status on Items in List  
☒ Remove Marked Status on Items in List

Cancel  Clear Order Details  Save  Order 

# FUND/REPORTING CODES

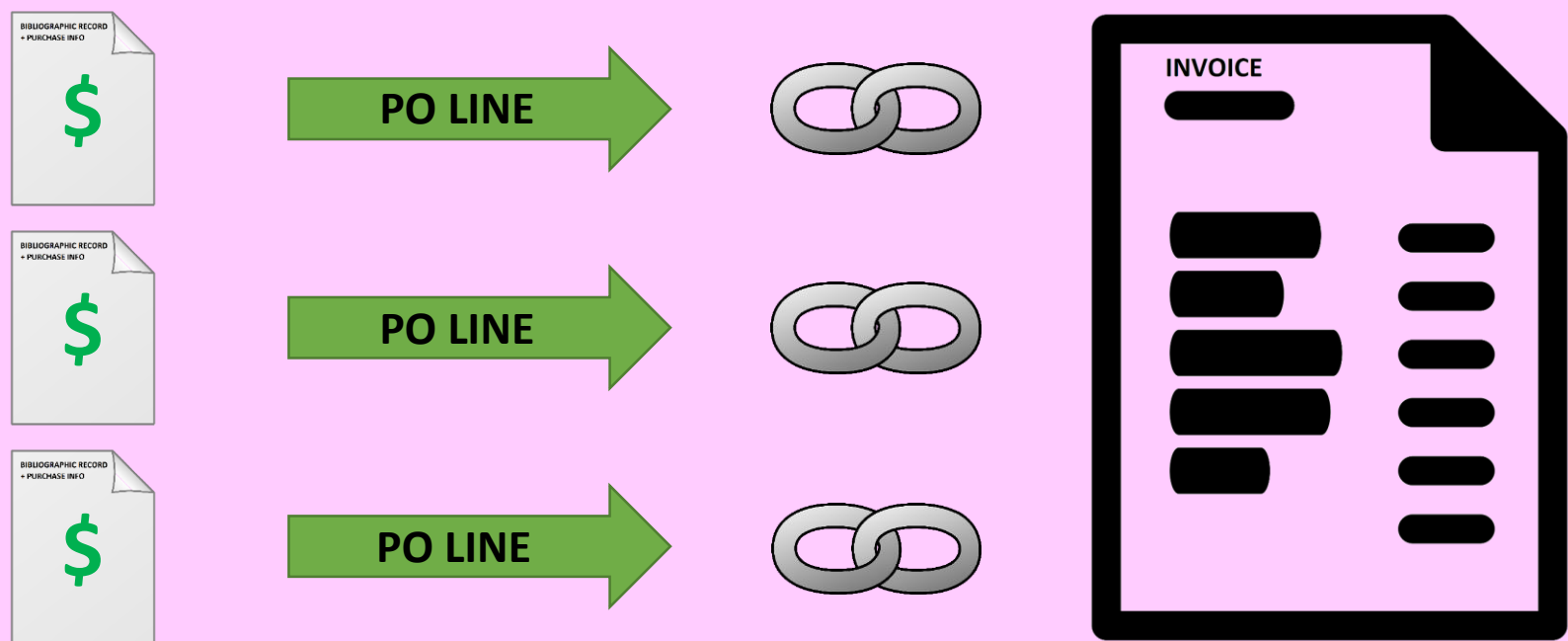
Configuration Menu > Acquisitions > Purchase Orders > Reporting Codes



# TOGETHER



# TOGETHER



# LOVE ISN'T PERFECT

- 'Overhead' vs. Shipping
- Blank invoice lines
- Short term loans
- Can't automate deletes

# WHAT'S NEXT?

- Hopefully automating deletes
- Short Term Loan EDI invoices
- Restructuring funds so that will change a lot of things
- World peace



# THANK YOU!

Emily Gross

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ILS Specialist

Western Michigan University

For more adventures in automation, see also:

Rinna, G., Swierenga, M., & Gross, E. “Scaling Technical Services to Alma and Primo.” ELUNA, May 2018, Spokane, WA.