Masthead Logo

Western Michigan University
ScholarWorks at WMU

University Libraries Faculty & Staff Presentations

University Libraries

5-2-2019

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

Emily Gross
*Western Michigan University*, emily.n.gross@wmich.edu

Follow this and additional works at: https://scholarworks.wmich.edu/library_presentations

Part of the Library and Information Science Commons

WMU ScholarWorks Citation

Gross, Emily, "PDA & EDI: Will They Find Each Other and Find Love?" (2019). *University Libraries Faculty & Staff Presentations*. 22.
https://scholarworks.wmich.edu/library_presentations/22

This Presentation is brought to you for free and open access by the University Libraries at ScholarWorks at WMU. It has been accepted for inclusion in University Libraries Faculty & Staff Presentations by an authorized administrator of ScholarWorks at WMU. For more information, please contact maira.bundza@wmich.edu.

Footer Logo

# PDA & EDI

Will They Find Each Other and Find Love?

Emily Gross

emily.n.gross@wmich.edu

ILS Specialist

Western Michigan University

ELUNA 2019 Atlanta

# 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.

https://www.up.com/suppliers/order_inv/edi/what_is_edi/

# 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

## DISLIKES

- Indecision

## ABOUT

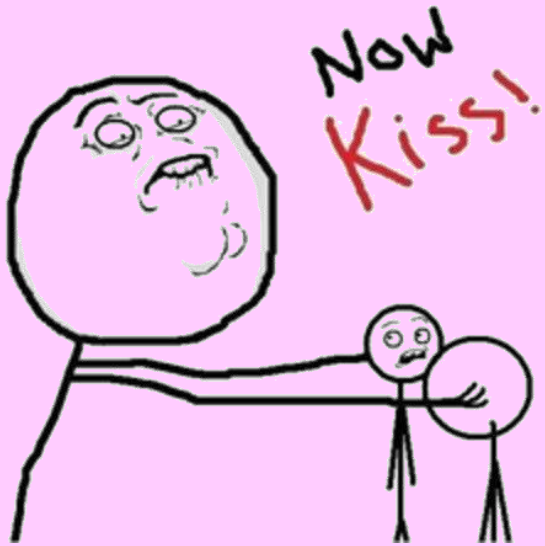
- Type A personality
- Favorite color green


```
UNA:+.?
'UNB+UNOC:2+1694510:31B+3467341:31B+190327:2000+308'UNH+481+INVOIC:D:96A:UN
: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




**…BUT…**

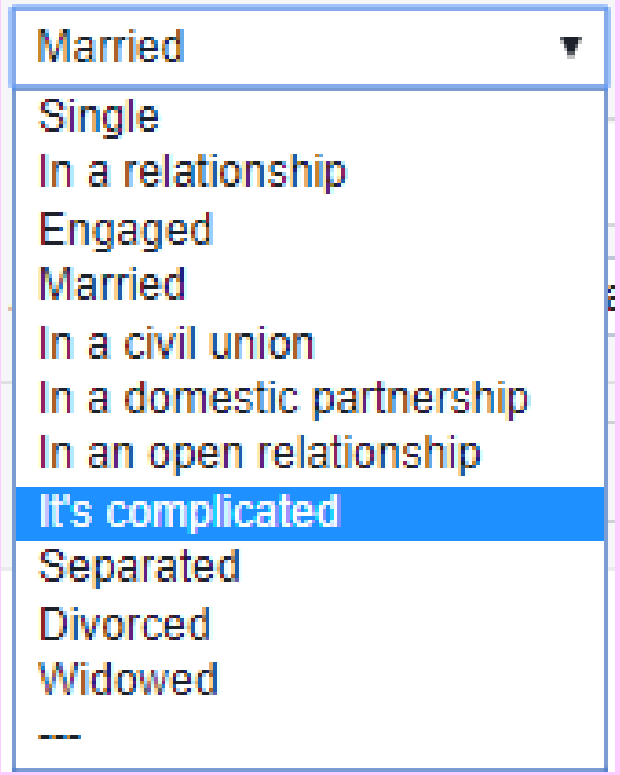
**EDI**

- **Reliability**
- **Accuracy**

Knowyourmeme.com

# IT’S COMPLICATED…

- Migration
- PDA administration
- Alma configuration



# IT’S COMPLICATED…

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

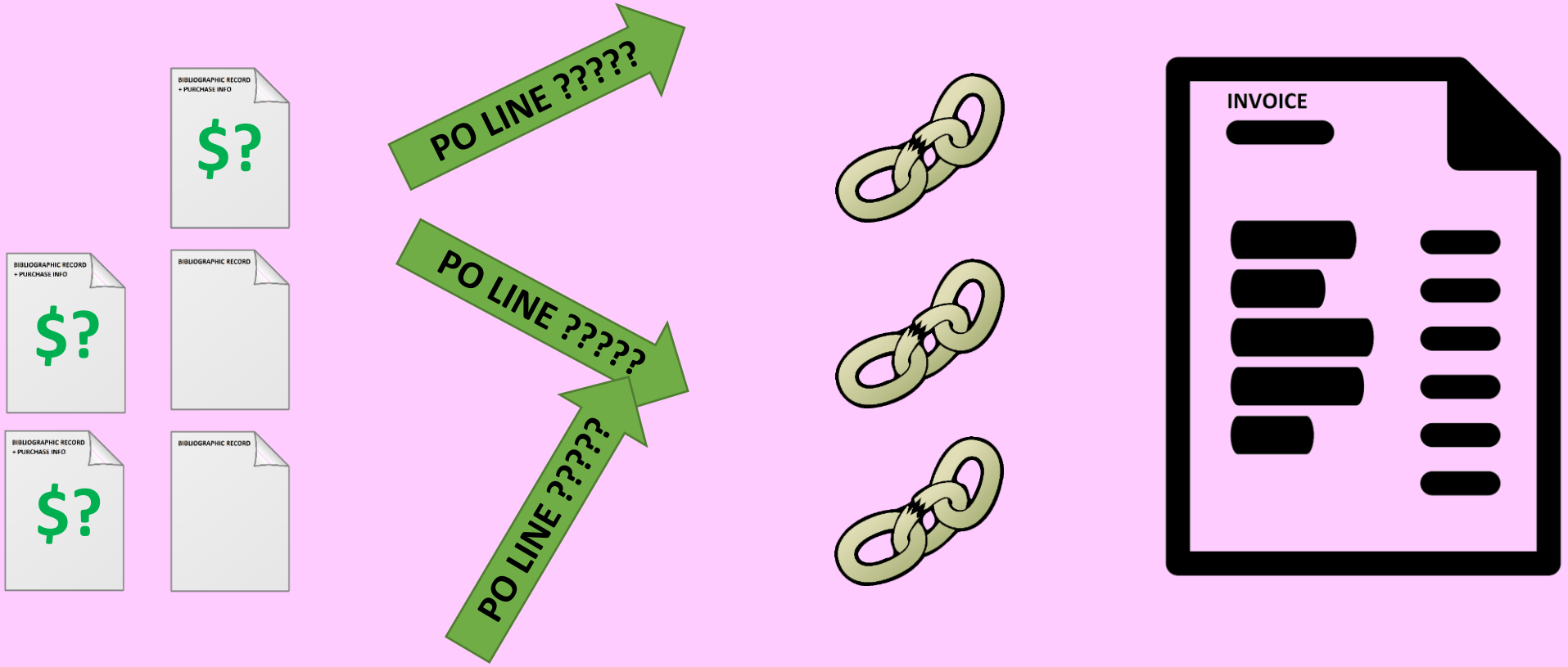
# IT’S COMPLICATED…

- 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




Openclipart.org

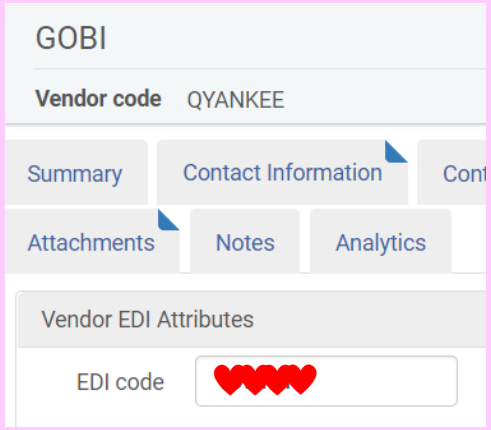
# HOW (AND WHERE) DO WE FI🩹IT?

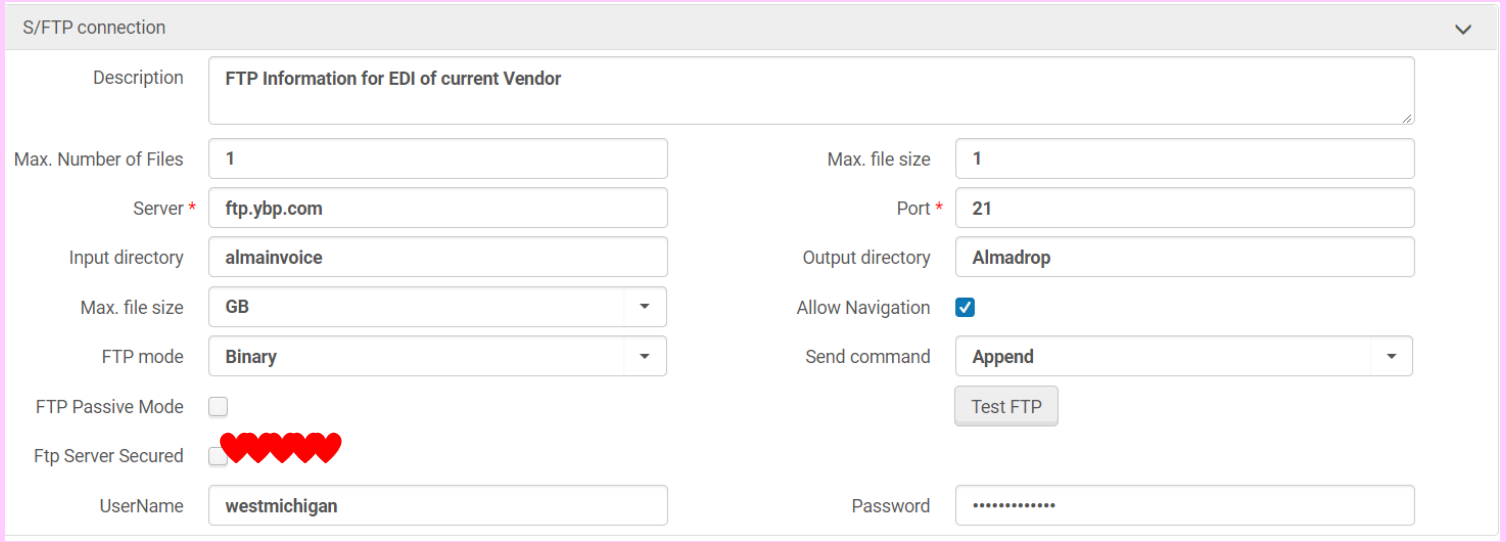
- Vendor profile
- Bibliographic records
- Import profile(s)
- Funds & reporting codes

# HOW (AND WHERE) DO WE FI🩹 IT?

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

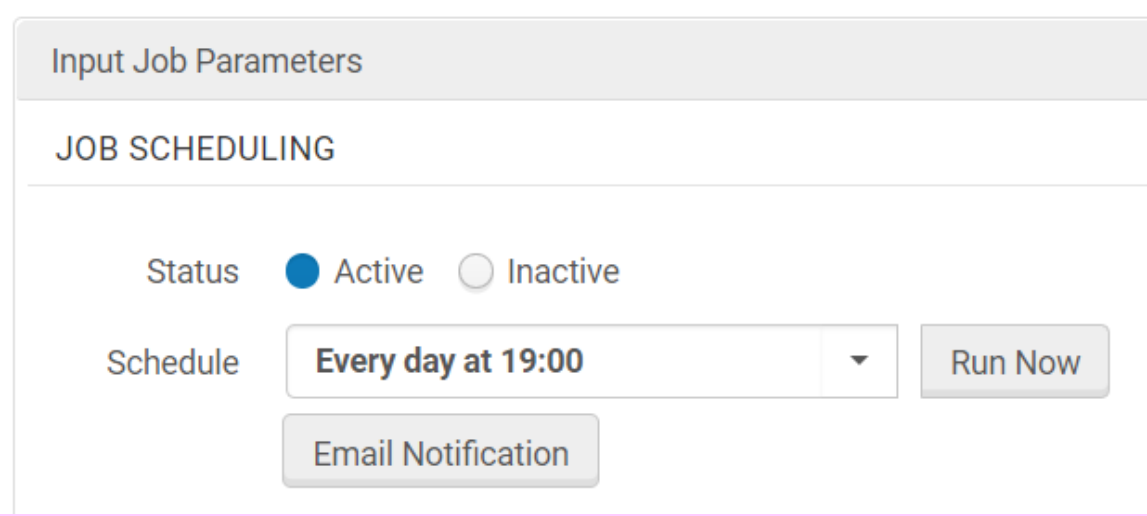
# EDI CODE


GOBI
Vendor code QYANKEE
Summary
Contact Information
Attachments
Notes
Analytics
Vendor EDI Attributes
EDI code

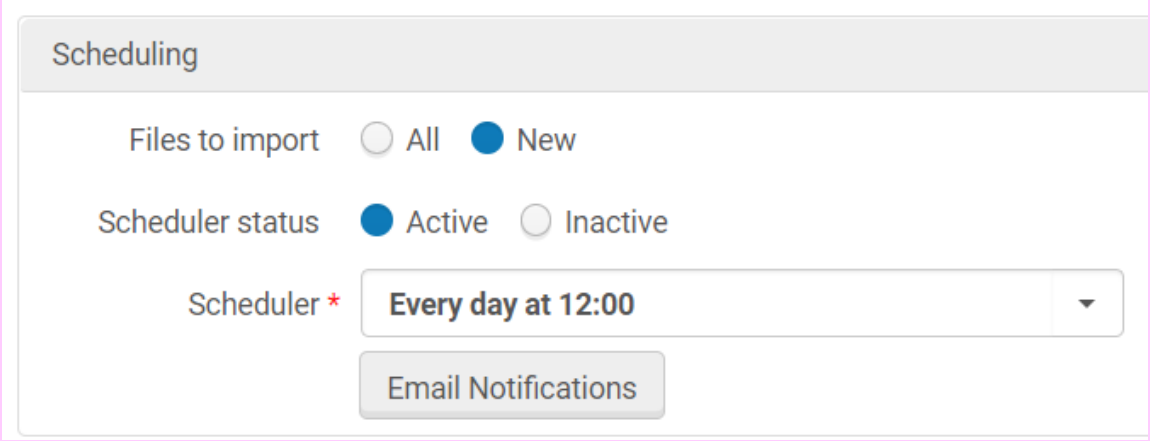

S/FTP connection
Description
FTP Information for EDI of current Vendor
Max. Number of Files
1
Max. file size
1
Server *
ftp.ybp.com
Port *
21
Input directory
almainvoice
Output directory
Almadrop
Max. file size
GB
Allow Navigation
FTP mode
Binary
Send command
Append
FTP Passive Mode
Test FTP
Ftp Server Secured
UserName
westmichigan
Password

# SCHEDULING

## INVOICES




## BIBLIOGRAPHIC RECORDS



# HOW (AND WHERE) DO WE FI🩹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 FI🩹IT?

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

# IMPORT PROFILE(S)

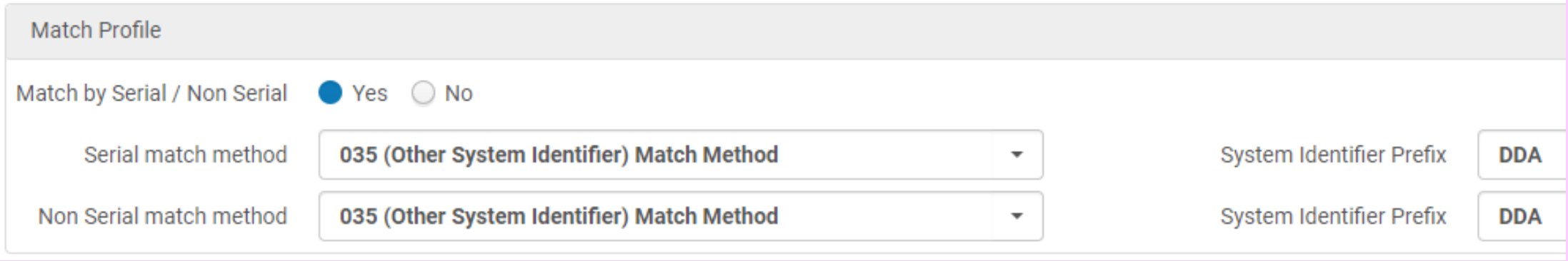
**Discovery Records**

- GOBI puts custom 035
- Scheduled daily

# IMPORT PROFILE(S)

**Purchase Records**

- Match Profile
- PO Line Information
- Scheduled daily



# 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 FI🩹IT?

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

# FUND/REPORTING CODES

Configuration Menu > Acquisitions > Purchase Orders > Reporting Codes

**Purchase Orders**

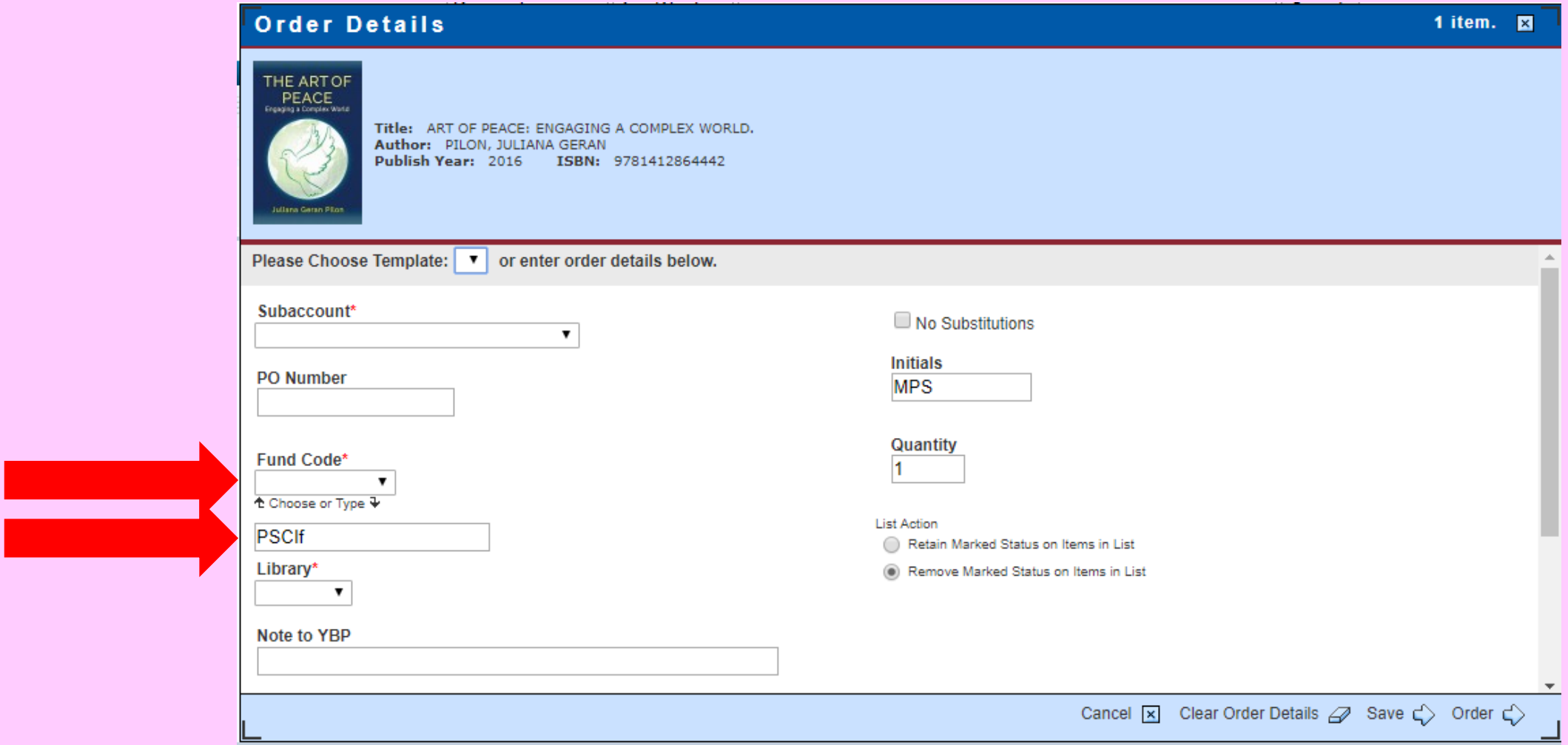
Reporting Codes

Secondary Reporting Codes

Tertiary Reporting Codes

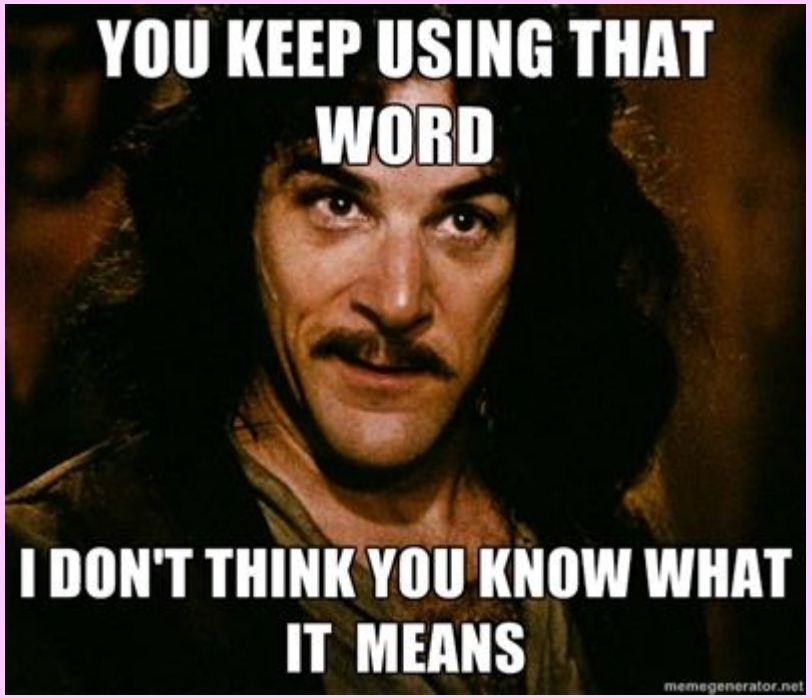
| | | |
|---|---|---|
| ACTY | Accountancy | Accountancy |
| ACTYa | Accountancy Approvals | Accountancy Approvals |
| ACTY-AP | Accountancy Auto Purchase | Accountancy Auto Purchase |
| ACTYe | Accountancy Electronic | Accountancy Electronic |
| ACTYf | Accountancy Forms | Accountancy Forms |
| ACTYp | Accountancy Purchase Orders | Accountancy Purchase Orders |
| ACTYr | Accountancy Replacements | Accountancy Replacements |
| ACTYv | Accountancy Videos | Accountancy Videos |

# FUND/REPORTING CODES



# FUND/REPORTING CODES

Configuration Menu > Acquisitions > Purchase Orders > Reporting Codes

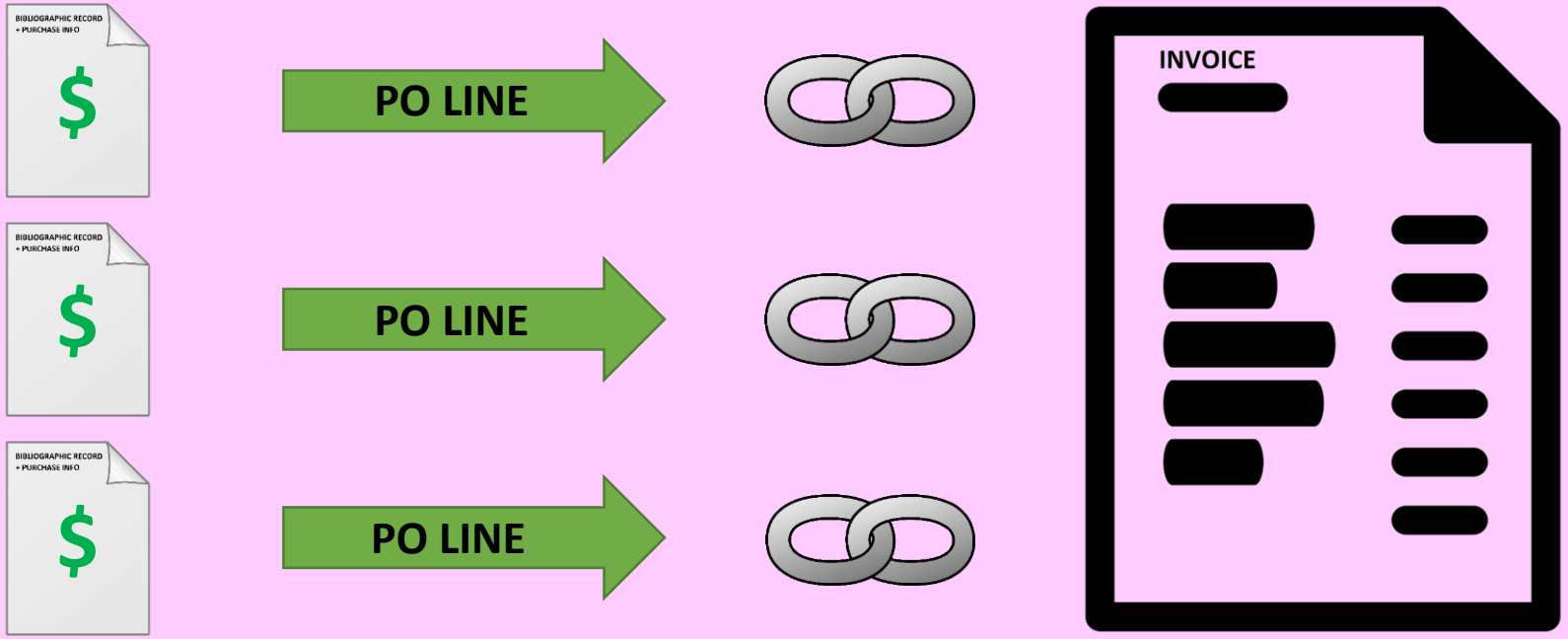



Knowyourmeme.com

# TOGETHER

Openclipart.org

# TOGETHER




Openclipart.org

# 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

Openclipart.org

# THANK YOU!

Emily Gross

emily.n.gross@wmich.edu

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.