Getting the Most from Alma

Patron Driven Acquisitions (PDA)

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Introduction

Surveys and analyses have shown that approximately 40% of library materials do not circulate. Libraries invest a substantial amount of their budget and staff allocation in purchasing and processing items that are not being used. They have to find ways to ensure that the building of the library's collection and staff efforts in this area focus on items that are relevant for its users.

In the 'print era' libraries needed to try and predict what the user would want and need, and would then have to ensure the availability of the item in the library – the just in case model.

In the digital era there are other alternatives. However, e-resources are often very expensive, taking up a large part of a library's budget. It is most important for libraries to have the option to only purchase items that are really needed by its patrons. PDA – Patron Driven Acquisitions offers a solution to this issue – the just in time model. Recognizing the importance of this kind of functionality, Alma incorporates a rich task-oriented PDA workflow.

What is PDA

PDA is an agreement between a vendor and the library. Library patrons are granted access to certain e-resources of the vendor. Once a defined threshold of access or usage has passed, the library is charged for the e-resource which then becomes part of the library's permanent collection. Utilizing PDA options will of course help improve the percentage of the library's collection that is being used, as only items that have been accessed or used are purchased.

In addition, as much of the PDA workflow requires no, or little staff intervention, valuable staff resources can be redirected to other, important tasks.
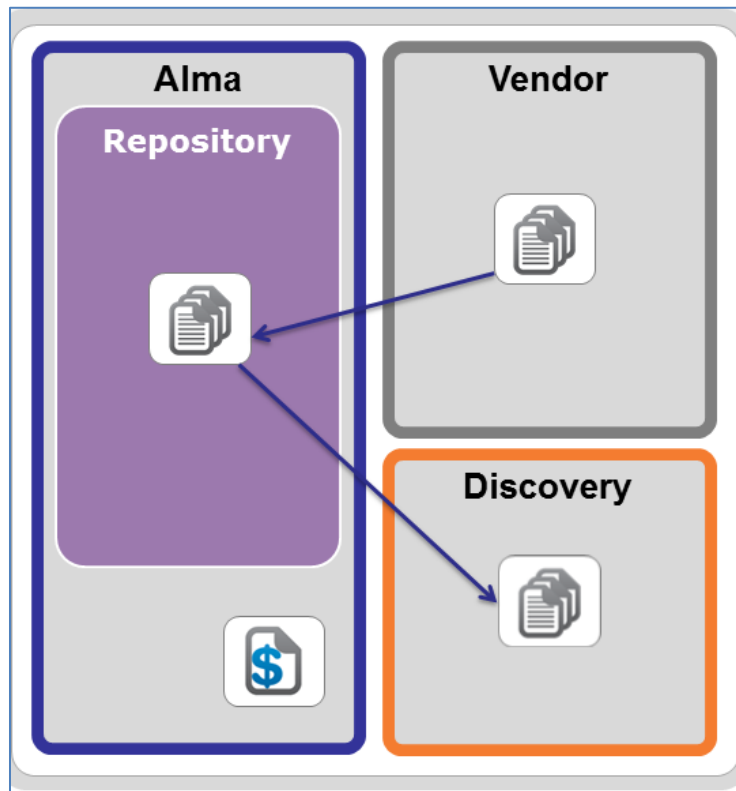
How does this play out in Alma?

PDA in Alma

Summary of the Workflow

- A PDA profile is created
- Vendor candidate e-records (with URLs) are loaded into the Alma repository
- Alma publishes the records to the discovery tool (Primo)
- Users discover and use the e-resources, triggering purchases
- The vendor sends PO Lines via EOD (embedded order data) and invoices via EDI

- After a defined period, the candidate e-resources that were not used (or usage did not exceed the defined threshold) are removed from the Alma repository and from the discovery tool.

The PDA Profile

The first step in the PDA workflow is to create a PDA profile.

While the initial status of the profile may be set as Draft, it must be set to Active in order to proceed and utilize all the options related to the PDA workflow. Creating a profile with status Active will result in the automatic creation of two import profiles:

- A Repository profile – a profile for loading candidates e-resources to the repository
- An EOD profile – a profile for creating purchase orders for e- resources that were accessed and used by users.

We can access these two profiles from the Actions button on a profile (from the Profile List screen):

Name	Code	Status	Vendor	Start Date	End Date	
Alexander Street Press	ASP	Active	Alexander Street Press	04/09/2013	07/02/2013	Actions
EBL PDA	MEL	Cancelled	Boardman	08/01/2012	08/16/2012	Edit
JMA test	123456	Draft	Elsevier	03/01/2013	-	Manage PDA Profiles
PDA profile for EBL	PDA_EBL	Active	Ebook Library	04/04/2013	04/16/2013	Duplicate / Terminate
PDA profile for JSTOR	PDA	Active	JSTOR	02/28/2013	12/04/2013	Cleanup / Cancel

Note that both profiles automatically get the prefix of the name of the PDA profile.

Active	Profile Name	Profile Description	Profile Type	
	ASP PDA Repository	Import Repository as part of PDA	PDA Repository	Actions
	ASP PDA New Order	Import EOD as part of PDA	PDA New Order	Actions

Importing and Publishing Records

The file of records will be imported from the vendor utilizing the Repository profile created as part of the workflow described above.

Once imported, they are published to Primo as part of the standard daily publishing update, and can then be discovered and displayed in the discovery tool.
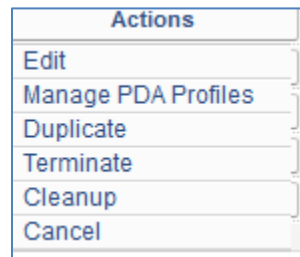

Triggering an Order

Based on the number of times the resource is accessed (as defined in the profile), an order will automatically be triggered and sent to the library.

When a predefined threshold of usage/access has been exceeded, the item is considered as purchased. A file of EOD records is sent to Alma; the file is uploaded into Alma using the PDA EOD profile. As part of standard EOD functionality, orders are created from imbedded data in the EOD record. In addition, orders are marked as PDA. This is very important, as it allows staff to easily understand the source of these orders, as well as being a very useful input option for reports and statistics.
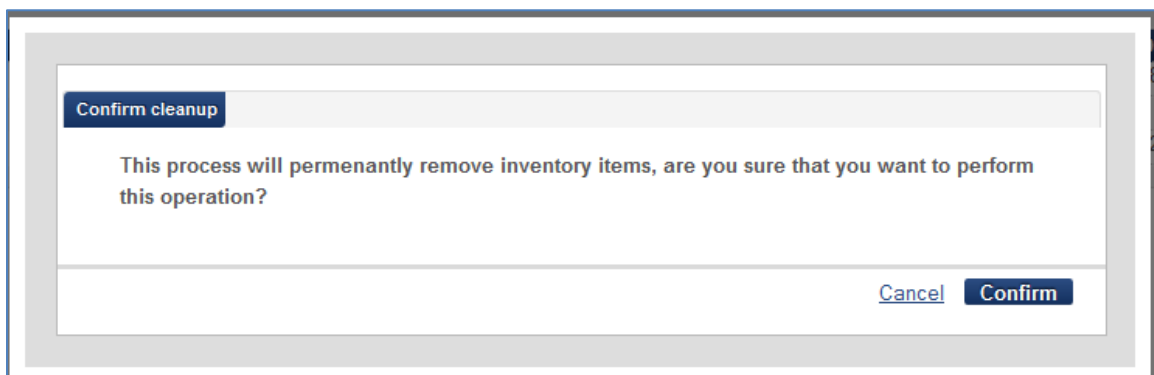
Termination and Cleanup

At any time the PDA profile can be terminated. Clicking on this option from the Actions button will set the end period date to the current date. Records can no longer be imported to the repository, although EOD records can still be loaded into Alma.

After terminating the trial the records that were not purchased can be deleted from the Alma Repository and the discovery tool. This is achieved by clicking on Cleanup from the Actions button.

We're asked to confirm the action:

Conclusion

PDA functionality in Alma offers rich automated workflows that ensure that the library collection is relevant for its patrons. As much of the workflow is unmediated, staff are able to utilize their time more efficiently.

The ability to generate reports and statistics based on the purchase type of the PDA orders is another added benefit helping management to analyze reports and statistics based on acquisition transaction type.