PDA Wizard Quick Start Guide

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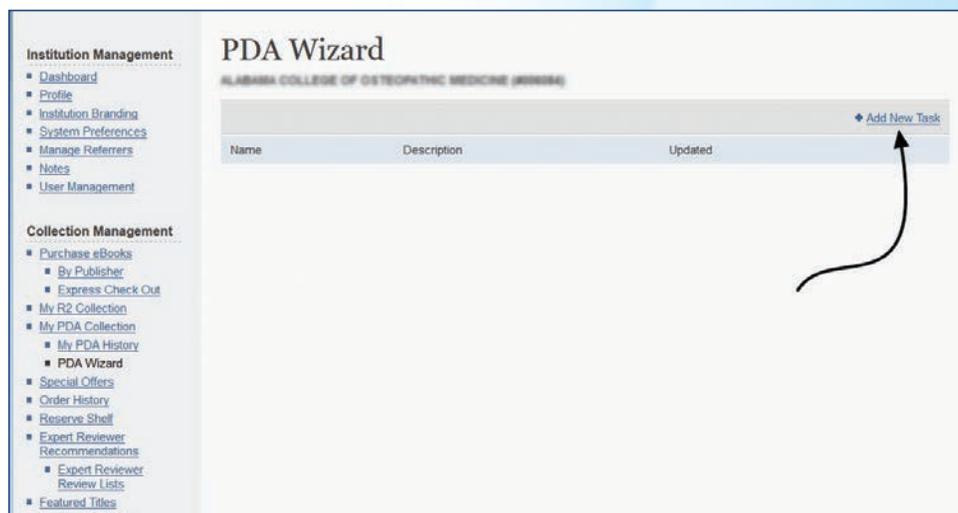DISTRIBUTING THE LEADING SCIENTIFIC, TECHNICAL AND MEDICAL PUBLISHERS

The PDA Wizard enables libraries to continuously add resources to an R2 Digital Library Patron Driven Acquisition (PDA) collection…automatically. This powerful tool helps libraries keep PDA collections up-to-date and ensure that users always have access to the latest resources.

Once configured, "tasks" in the PDA Wizard continuously add resources to a PDA collection as they are added to the R2 Digital Library. The Wizard can also be used to add currently available titles to a PDA collection.

To enable the PDA Wizard, log in with your Admin credentials and click "PDA Wizard" on the left navigation panel:
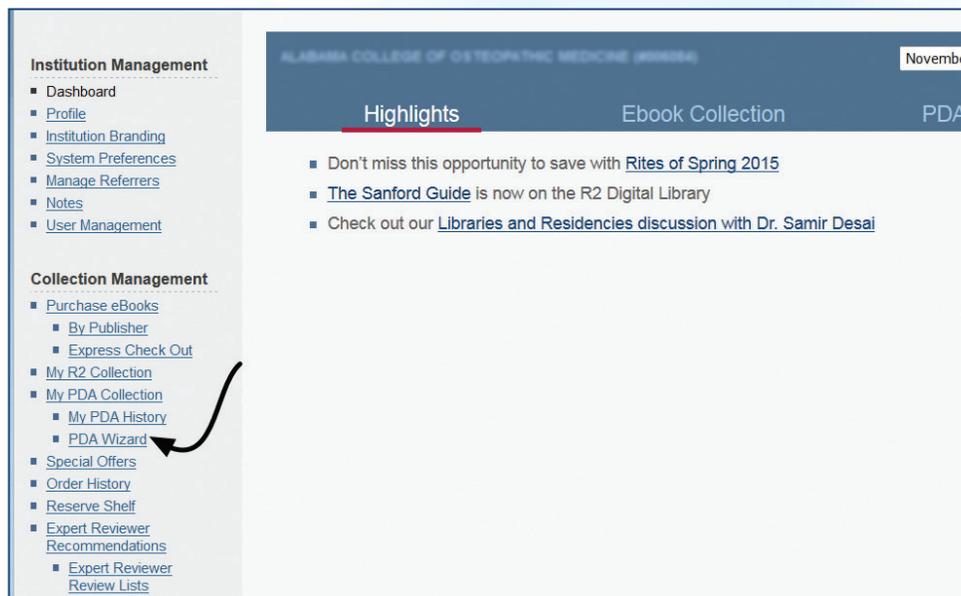
Upon entering the PDA Wizard's environment, click "Add New Task" to assign the first task to the PDA Wizard. There is no limit to the number of tasks that can be assigned to the Wizard.

Now it is time to name and define the task. The task must have a title, and one of the following must be selected:

- Apply Task to All Resources (all available resources)
- New Editions of Purchased Resources (to automatically add new editions of previously purchased resources to PDA)
- New Editions of PDA Resources (to automatically add new editions of resources previously included in PDA to PDA)

There are many options on what resources will be automatically added to a PDA collection, including:

- New editions of previously purchased resources
- New editions of resources previously included in PDA
- All resources
- Special collections (Doody's Core Titles, AJN Books of the Year, Nursing Essentials, etc.)
- Practice area
- Discipline

The task can be further refined by:

- Assigning a maximum price
- Adding currently available resources to PDA
- Adding future released titles to PDA (default selection)

Once the task is configured, click "SAVE" to activate the task:

A task can be applied to future resources only, current resources only, or to current and future resources.

If the task is configured to include currently available titles, the Wizard will display a summary of the task and titles that will be added to the PDA collection. The system will request the task to be verified.
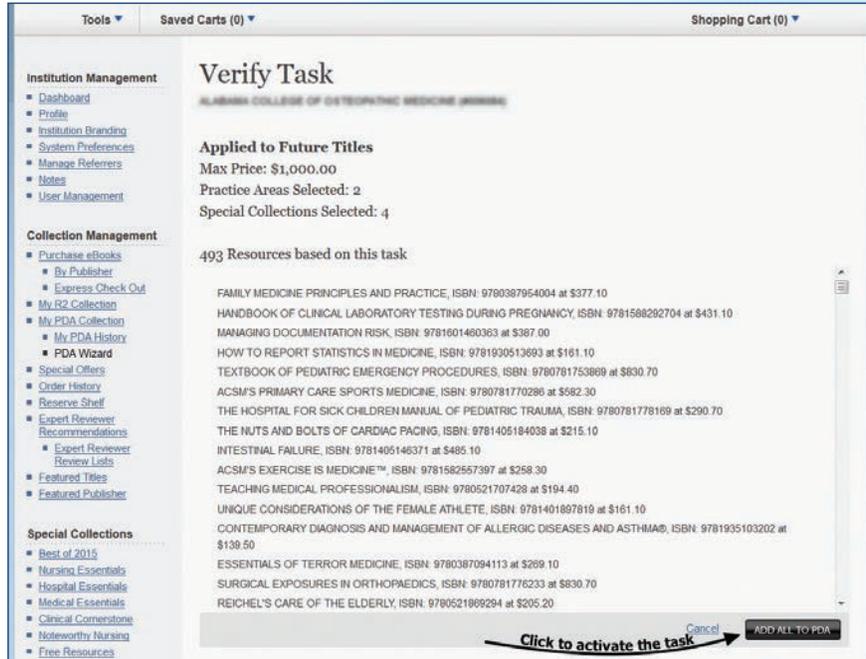
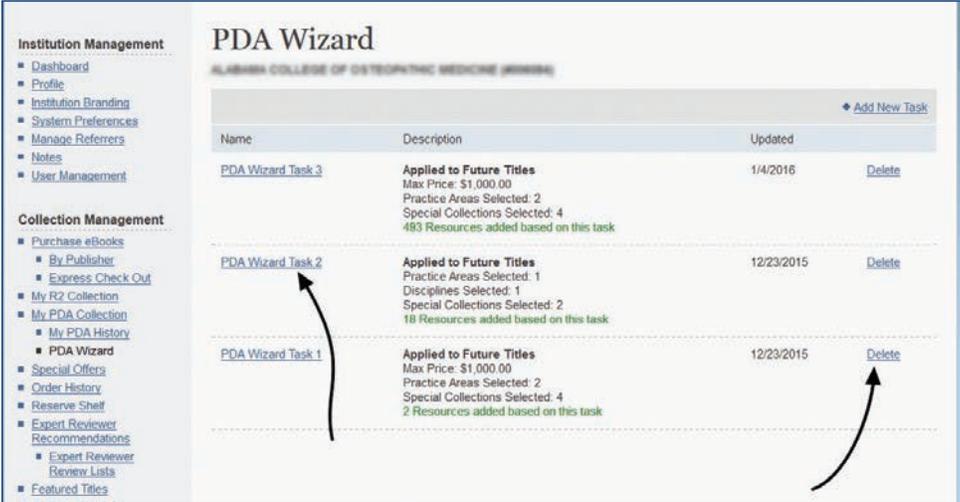The Wizard will then verify that it added the titles to PDA:
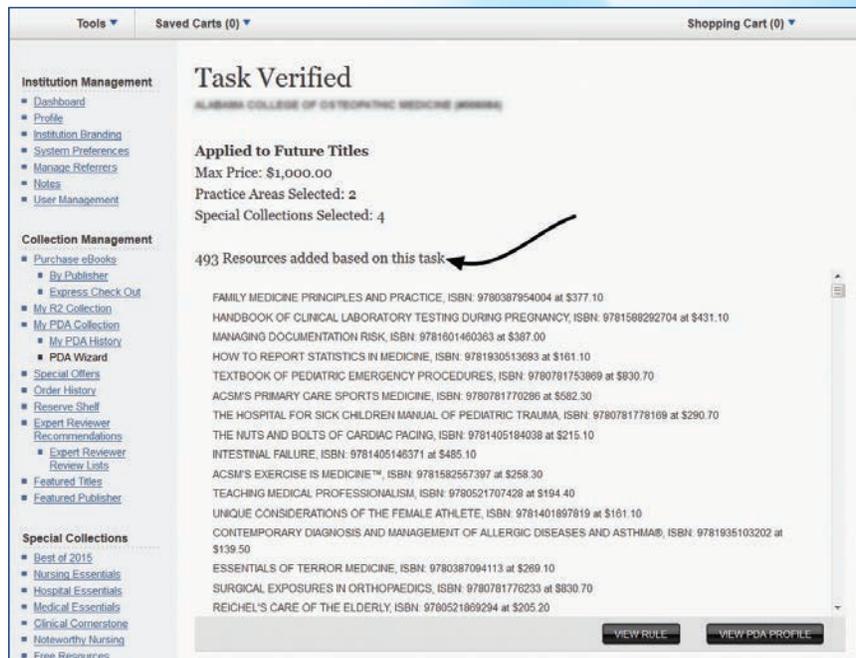
If the task is applied only to future resources, no resources will be added upon saving the task. All titles added to the R2 platform from that point forward that meet the configuration of the task will be automatically added to a PDA collection.

Note

A trial account can convert to an active account via the PDA Wizard. An active account can use the wizard to initiate a PDA collection.

To edit a task in the PDA Wizard environment, click on the task name. To delete a task, click "Delete."

Additional Notes

- Editing or deleting a task will not remove titles from a PDA collection.
- Titles are added to PDA in real-time. You will receive a weekly summary of titles added via tasks assigned to their Wizard.
- Untriggered titles added to PDA via the PDA Wizard that are manually removed by the IA from PDA WILL NOT be added to PDA again by a Wizard task. Once manually removed, if still eligible for PDA, they will have to be manually re-added to PDA.
- Titles added via Wizard will be identified in the My PDA area and My PDA History reports.

THANK YOU FOR USING THE PDA WIZARD TO GET THE MOST FROM YOUR R2 DIGITAL LIBRARY PDA COLLECTION

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