PDA Wizard Quick Start Guide



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PDA Wizard Quick Start Guide

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.

Institution Management	PDA WI	zard		
Dashboard	ALABAMA COLLEGA	E OF OSTEOPHTHIC MEDICINE (#004054)		
Profile				
Institution Branding				Add New Task
System Preferences				
Manage Referrers	Name	Description	Updated	Т
Notes				
User Management				
Collection Management)
Purchase eBooks				
By Publisher				
Express Check Out				1
My R2 Collection				
My PDA Collection				
My PDA History				
PDA Wizard				
Special Offers				
Order History				
Reserve Shelf				
Expert Reviewer Recommendations				
Expert Reviewer Review Lists				
Featured Titles				
- Control Titles				

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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:

Institution Management	PDA Wizard Task	
Profile Institution Branding System Preferences Manage Referrers Notes User Management	Apply Task to All Resources Required by Wizard New Editions of PUChased Resources New Editions of PDA Resources	
Collection Management Purchase eBooks Ry Publisher	Name PDA Wizard Task 3	
Express Check Out	Special Collections d	lear
My R2 Collection My PDA Collection My PDA History	DCT × DCT Essentials × Best of 2015 × AJN Books of the Year ×	
 PDA Wizard Special Offers 	Practice Areas d	lear
Order History Reserve Shelf	Medicine × Nursing ×	
Expert Reviewer Recommendations Expert Reviewer Deviewer	Disciplines d	lear
Featured Titles	- Discipline	
Eeatured Publisher	Fully customizable	
Special Collections	Max Price	
Best of 2015 Nursing Essentials Hospital Essentials	1000	
Medical Essentials Clinical Cornerstone Noteworthy Nursing Free Resources	Apply to Currently Available Titles Apply to current titles and/or future titles	
	· Apply to Future Titles	
Institution Reports	Swe Cancel	
Application Usage Report Resource Usage Report	Click "SAVE" to activate this task	
My Reports		
E Counter Departs		_

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.

Tools • S	sd Carts (0) 🔻 Shopping Cart (0) 🔻	
Institution Management	Verify Task	
Dashboard Drofie	ALABAMA COLLEGE OF OSTEOPATHIC MEDICINE (MINHA)	
Institution Branding		
System Preferences	Applied to Future Titles	
Manage Referrers	Max Price: \$1,000.00	
Notes	Practice Areas Selected: 2	
• User Management	Special Collections Selected: 4	
Collection Management		
Purchase eBooks	403 Resources based on this task	
By Publisher	453	
Express Check Out	FAMILY MEDICINE PRINCIPLES AND PRACTICE, ISBN: 9780387954004 at \$377.10	1
My R2 Collection	HANDBOOK OF CLINICAL LABORATORY TESTING DURING PREGNANCY ISBN: 9781588292704 at \$431.10	
My PDA Collection My PDA History	MANAGING DOCUMENTATION RISK, ISBN: 9781601460363 at \$387.00	
PDA Wizard	HOW TO REPORT STATISTICS IN MEDICINE, ISBN: 9781930513693 at \$161.10	
Special Offers	TEXTBOOK OF PEDIATRIC EMERGENCY PROCEDURES, ISBN: 9780781753869 at \$830.70	
Order History	ACSM'S PRIMARY CARE SPORTS MEDICINE, ISBN: 9780781770286 at \$582.30	
Reserve Shelf Emond Devicement	THE HOSPITAL FOR SICK CHILDREN MANUAL OF PEDIATRIC TRAUMA, ISBN: 9780781778169 at \$290.70	
Recommendations	THE NUTS AND BOLTS OF CARDIAC PACING, ISBN: 9781405184038 at \$215.10	
Expert Reviewer	INTESTINAL FAILURE, ISBN: 9781405146371 at \$485.10	
Review Lists	ACSM/S EXERCISE IS MEDICINE™, ISBN: 9781582557397 at \$258.30	
Featured Publisher	TEACHING MEDICAL PROFESSIONALISM, ISBN: 9780521707428 at \$194.40	
	UNIQUE CONSIDERATIONS OF THE FEMALE ATHLETE, ISBN: 9781401897819 at \$161.10	
Special Collections	CONTEMPORARY DIAGNOSIS AND MANAGEMENT OF ALLERGIC DISEASES AND ASTHMA®, ISBN: 9781935103202 at	
 Best of 2015 	\$139.50	
Nursing Essentials	ESSENTIALS OF TERROR MEDICINE, ISBN: 9780387094113 at \$269.10	
 Hospital Essentials 	SURGICAL EXPOSURES IN ORTHOPAEDICS, ISBN: 9780781776233 at \$830.70	
Medical Essentials	REICHEL'S CARE OF THE ELDERLY, ISBN: 9780521869294 at \$205.20	-
Noteworthy Nursing	Cancel ADD ALL TO	PDA
= Free Resources	Click to activate the task	

The Wizard will then verify that it added the titles to PDA:

Tools *	Saved Carts (0) Shopping Cart (0) Shopping Cart (0)	
Institution Manageme Dashboard Profile Institution Branding System Preferences Manage Referrers Notes User Management	Task Verified Applied to Future Titles Max Price: \$1,000.00 Practice Areas Selected: 2 Special Collections Selected: 4	
Collection Managemi Parchase eBooks Pay Publisher Express Check Qu Mr. R2 Collection Mr. PDA History PDA Waard Special Collens Order History Basenum Shell Expert Reviewer Reserver Shell Expert Reviewer R	493 Resources added based on this task FAMLY MEDICHE PRINCIPLES AND PRACTICE, ISBN: 9780387954004 at \$377.10 HANDBOOK OF CUNICAL LABORATORY TESTING DURING PREGNANCY, ISBN: 9781580292704 at \$431.10 MANAGING DOCUMENTATION RISK, ISBN: 9781601460283 at \$387.00 HOW TO REPORT STATISTICS IN MEDICINE, ISBN: 9781930513083 at \$161.10 TEXTBOOK OF PEDROTTS INSTICTS IN MEDICINE, ISBN: 9781930513083 at \$161.10 TEXTBOOK OF PEDROTTS INSTICS IN MEDICINE, ISBN: 9780781752808 at \$830.70 ACSIN'S PRIMARY CARE SPORTS MEDICINE, ISBN: 9780781770286 at \$582.20 THE HOSPITAL FOR SICK CHILDREN MANUAL OF PEDIATRIC TRALING, ISBN: 9780781778109 at \$290.70 THE NUTS TALL FOR SICK CHILDREN MANUAL OF PEDIATRIC TRALING, ISBN: 9780781778109 at \$290.70 THE NUTS TALL FOR SICK CHILDREN MANUAL OF PEDIATRIC TRALING, ISBN: 9780781778109 at \$290.70 THE NUTS TALL FOR SICK CHILDREN MANUAL OF PEDIATRIC TRALING, ISBN: 9780781778109 at \$290.70 THE NUTS TALL FOR SICK CHILDREN MANUAL OF PEDIATRIC TRALING, ISBN: 9780781778109 at \$290.70 THE NUTS TALL FOR SICK CHILDREN MANUAL OF PEDIATRIC TRALING, ISBN: 9780781778109 at \$290.70 THE NUTS TALL FOR URLE, ISBN: 97814071 at \$486.10 ACSIN'S EXERCISE IS MEDICINE™, ISBN: 9781582567397 at \$258.30 TEACHNIS MEDICAL PROFESSIONALISM, ISBN: 97815827170748 at \$194.40 INTESTINAL FALLURE, ISBN: 9781580581770748 at \$194.40	• 10
Special Collections Best of 2015 Nursing Essentials Hospital Essentials Clinical Correrstone Noteworthy Nursing	CONTEMPORARY DIAGNOSIS AND MANAGEMENT OF ALLERGIC DISEASES AND ASTHMA®, ISBN 9781935103202 at \$139.50 ESSENTIALS OF TERROR MEDICINE, ISBN 9780387094113 at \$289.10 SURGICAL EXPOSURES IN ORTHOPREDICS, ISBN 9780781776233 at 8850.70 REICHEL'S CARE OF THE ELDERLY, ISBN 9780521869204 at \$205.20 VEW RULE	

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."

institution management	I DA WIZARU				
Dashboard Profile	ALABAMA COLLEGE OF OSTEOPHING MEDICINE (MINNIN)				
Institution Branding				Add New Task	
System Preferences Manage Referrers	Name	Description	Updated		
 <u>Notes</u> <u>User Management</u> 	PDA Wizard Task 3	Applied to Future Titles Max Price: \$1,000.00 Practice Areas Selected: 2	1/4/2016	Delete	
Collection Management		Special Collections Selected: 4 493 Resources added based on this task			
Purchase eBooks By Publisher Express Check Out My R2 Collection My PDA Collection My PDA History	PDA Wizard Task 2	Applied to Future Titles Practice Areas Selected: 1 Disciplines Selected: 1 Special Collections Selected: 2 18 Resources added based on this task	12/23/2015	Delete	
PDA Wizard Special Offers Order History Reserve Shelf	PDA Wizard Task 1	Applied to Future Titles Max Price: \$1,000.00 Practice Areas Selected: 2 Special Collections Selected: 4 2 Resources added based on this task	12/23/2015		
Expert Reviewer Recommendations Expert Reviewer Review Lists Featured Titles	1		,	/	

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

Need more information? Contact your Rittenhouse Sales Representative or Rittenhouse Customer Service at **800.345.6425**. Visit us at **Rittenhouse.com**.