



Managing E-Resources

Description and Objectives

Expose attendees to end-to-end management of electronic resources and best practices in general.

Objectives

- Understand how e-resources are organized and managed in Alma
- Select and order e-resources from the Community Zone
- Activate e-resources and make them available to your patrons
- Set up e-resource trials, deactivate e-resources, and more!

Agenda

- 1** Overview and Background
- 2** Ordering E-Resources
- 3** Activating E-Resources
- 4** Other Tools (trials; deactivation; updates; overlap analysis; etc.)
- 5** Next Steps, Support Resources, and Feedback



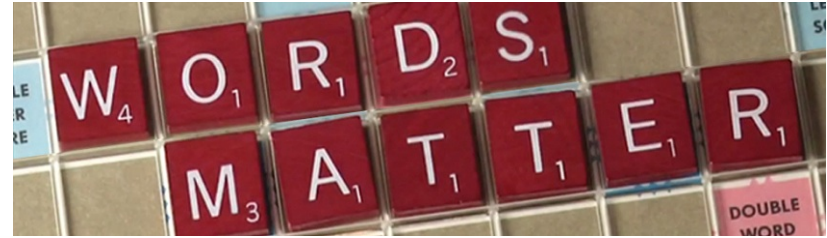
1. Overview and Background

- **Terminology and E-Resource Levels**
- **General E-Resource Workflow**
- **User Roles**
- **Inventory Model in Alma**
- **Advanced Search**
- **Community Zone**

Terminology

Electronic Collection includes:

- Aggregator Packages
- Selective Packages
- Databases



Portfolios: Serial or monograph titles

- Can be *standalone* entity or *within* a package

Service: Services a package offers in its portfolios (for example, full-text or selected full-text) and connection/linking information

Electronic-Resource Levels

Electronic
Collection

Service

Portfolio List

Portfolio Title

ProQuest Biological Science
Journals

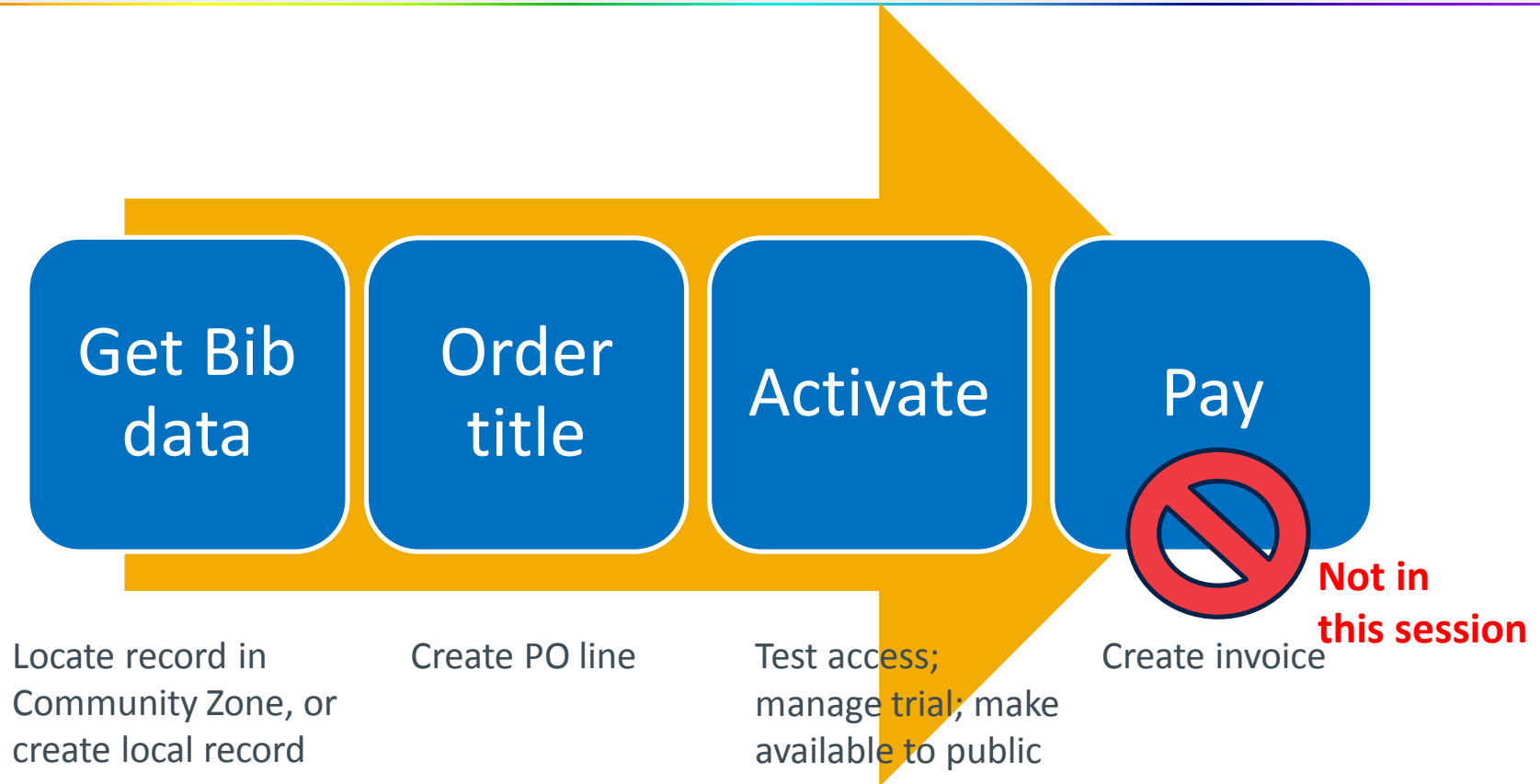
Full Text

1,471 e-journals

Biomedical Journal

ISSN 2320-2890
Date Coverage: 2013-

General Electronic-Resource Workflow



User Roles Needed for E-Resource Management

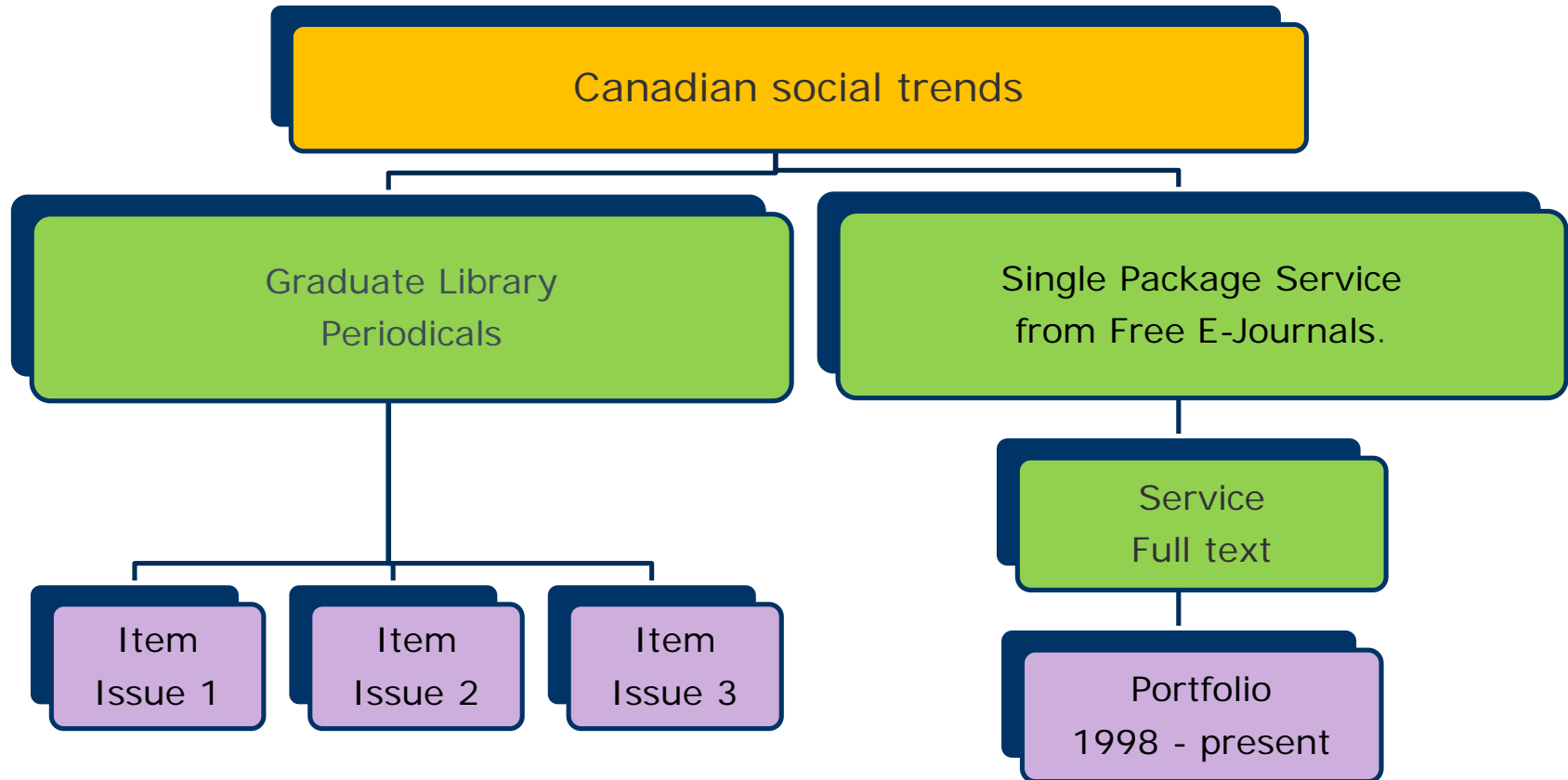
Role	Task
Purchasing Operator	Create PO Lines to order e-resources
Electronic Inventory Operator or Repository Manager	Activate e-resources
Trial Manager or Trial Operator	Manage trials
Invoice Operator	Creates invoice to finalize payment



1. Overview and Background

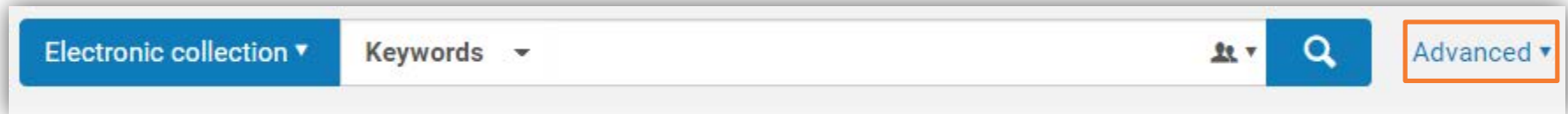
- Terminology and E-Resource Levels
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- User Roles
- **Inventory Model**
- **Advanced Search**
- **Community Zone**

Inventory Model in Alma



Advanced Search

Use Alma's Advanced Search functionality to identify important information about collections and portfolios in your Library or in the CZ.





Community Zone - Background

- Alma's central community catalog:
 - Ex Libris loads MARC records from publisher / partners
 - Institutions have easy access to the records that they want to bring into their local catalogs.



- Total Packages: 8100+
- Full-Text Object Portfolios: 20,000,000+



Community Zone – Contribute to CZ

- Update CZ bib records
- Add portfolios into CZ collections of the type Free E-Journals, Miscellaneous E-Journals, Miscellaneous Free E-Books, and U.S. Government Documents
- Contribute collections to CZ
- Your Alma must be in Production to participate



Agenda

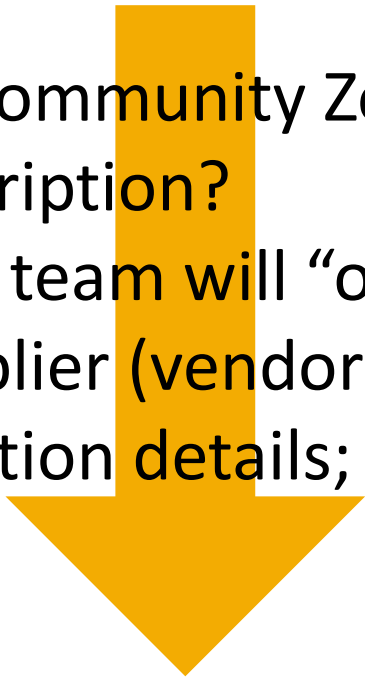
- 1 Overview and Background
- 2 **Ordering E-Resources**
- 3 **Activating E-Resources**
- 4 **Other Tools**
- 5 **Next Steps, Support Resources, and Feedback**



2. Ordering E-Resources

- **General Workflow**
- **Order Resource from CZ**
- **Create Local Collection**
- **Create Local Portfolio**
- **Link Local Resource to CZ Resource**

Ordering: General Workflow

- Find collection in Community Zone
 - One-Time or Subscription?
 - Which acquisitions team will “own” the order?
 - Select license, supplier (vendor), access provider, price, fund, acquisition details; start date and renewal date, etc.
- 



2. Ordering E-Resources

- General Workflow
- Order Resource in CZ
- **Create Local Collection**
 - With Portfolios
 - Without Portfolios (“Database”)
- **Create Local Portfolio**
- **Link Local Resource to CS Resource**

Local Collections

Local electronic collections can be:

- Selective packages
- Aggregator packages
- Databases



Why create a local collection?

- Electronic resource doesn't exist in Community Zone
- Better metadata from provider



2. Ordering E-Resources

- General Workflow
- Create Local Collection
- **Create Local Portfolio**
- **Link Local Resource to CZ Resource**

Create Local Portfolio and Order

- Local portfolio records can be created for standalone portfolio titles
- Why create a local portfolio?
 - Electronic resource doesn't exist in Community Zone
 - Better metadata available from provider

Attach Standalone Portfolio to a Collection

1. Advanced search: Electronic Portfolio is Standalone = Yes
2. Row Action: Edit Portfolio
3. Tool: Attach to an Electronic Collection
4. Choose Collection
5. Select Service



The screenshot shows a user interface for an 'Electronic Portfolio Editor'. At the top, there is a title 'Electronic Portfolio Editor' followed by a three-dot menu icon. To the right of the menu icon is a button labeled 'Attach to an electronic collection', which is highlighted with an orange border. Below this header, there is a list of items. The first item is a book entry with a small thumbnail image of the book cover on the left. The text to the right of the thumbnail reads: 'Millions of Cats Gag, Wanda Author Putnam Juvenile Imprint [Place of publication not identified] 1952 [1-4619-0997-X]'. The entire interface is enclosed in a blue border.



2. Ordering E-Resources

- General Workflow
- Create Local Collection
- Create Local Portfolio
- **Link Local Resource to CZ Resource**

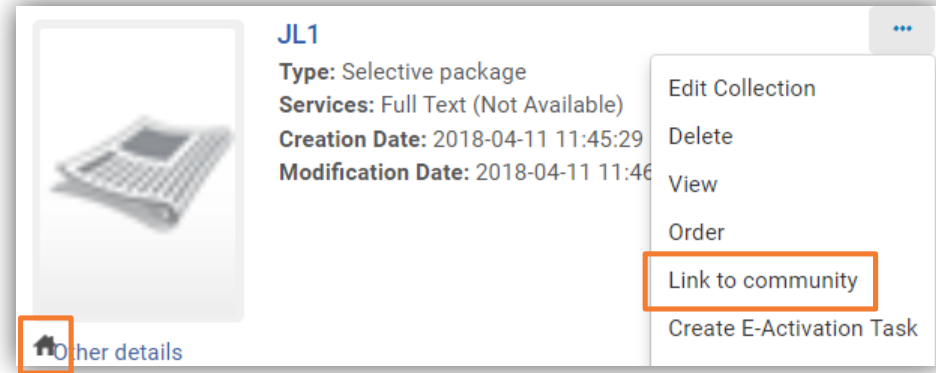
Link Local Resource to CZ Resource

For later when you decide to link to a Community Zone record, because:

- Community Zone finally has the record; or
- Community Zone metadata is good now

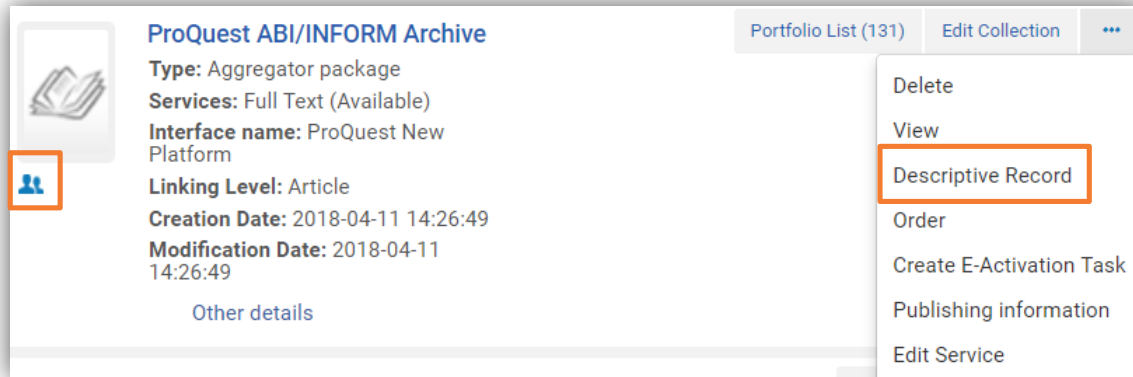
Link Local Collection to CZ

1. Find local collection by Keyword
2. Row action: Link to community
3. Search CZ for matching collection
4. Choose bib records (local or CZ) for the matching portfolios



Unlink Collection from CZ

1. Find CZ-linked collection
2. Row action: Descriptive Record



ProQuest ABI/INFORM Archive Portfolio List (131) Edit Collection ...

Type: Aggregator package
Services: Full Text (Available)
Interface name: ProQuest New Platform
Linking Level: Article
Creation Date: 2018-04-11 14:26:49
Modification Date: 2018-04-11 14:26:49

[Other details](#)

- Delete
- View
- Descriptive Record**
- Order
- Create E-Activation Task
- Publishing information
- Edit Service

3. Edit record
4. In MD Editor: File > Copy to Catalog

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3. Activating E-Resources

- **General Workflow**
- **Activation**
- **Test Access**
- **Finalize Activation**

General Workflow

- Find item ordered and ready to be activated
 - Select service, URL, interface, dates, linking parameters
 - Choose portfolio activation method (all or selective)
 - Optional: Choose auto activate new portfolios; proxy
 - Test Access
 - Unsuppress to discovery service
- 

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4. Other Tools

- **Trial**
- **Deactivate / Delete Resources**
- **Community Zone Updates**
- **Inactive Services or Proxy**
- **Manage Patron Access**
 - by campus or library
- **Overlap Analysis**

Trial (a.k.a., Evaluation) General Workflow

- PO Line must be in review (not yet ordered)
- Trial Details:
 - Start and end dates
 - Survey form (questionnaire)
 - Participants
 - Public or private
- Activate service but don't make it Available
- After trial ends: Analyze results of survey

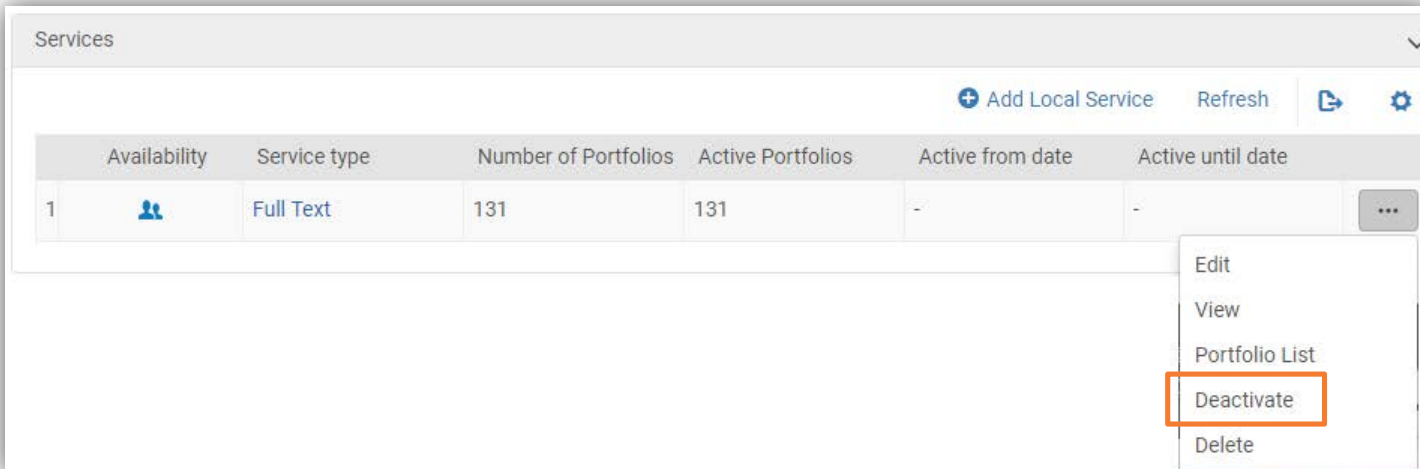


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- Trial
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Deactivate Collection

- Search for the collection (in IZ)
- Edit Collection
- Select Additional Information tab
- Services – Row-action: Deactivate



The screenshot displays a web interface titled "Services". At the top right, there are buttons for "Add Local Service", "Refresh", and a settings icon. Below this is a table with the following columns: "Availability", "Service type", "Number of Portfolios", "Active Portfolios", "Active from date", and "Active until date". The table contains one row with the following data: "1", a group icon, "Full Text", "131", "131", "-", and "-". A dropdown menu is open for the first row, showing options: "Edit", "View", "Portfolio List", "Deactivate" (highlighted with an orange border), and "Delete".

	Availability	Service type	Number of Portfolios	Active Portfolios	Active from date	Active until date	
1		Full Text	131	131	-	-	...

- Edit
- View
- Portfolio List
- Deactivate
- Delete

Delete Resource

- Search for the resource
- Delete
- Choose how to handle bibliographic records without inventory

Delete confirmation

i Please note: The Portfolios deletion process is about to delete 18 portfolios by a background process. An email will be sent upon completion.

Handling bibliographic records without inventory

Look-up or select

- Do nothing
- Delete bibliographic record(s)
- Suppress bibliographic record(s)

Community Zone Updates

- Mostly occur Sunday at midnight (your local time)
- Displayed in the Community Zone Updates Task List
 - **Review** tab: Updates that require your action
 - **All** tab: All updates, including automatic

The screenshot shows the 'Community Zone Updates Task List' interface. At the top, there is a navigation bar with a back arrow, the title 'Community Zone Updates Task List', and buttons for 'Dismiss Selected', 'Execute', 'Cancel', and 'Back'. Below the navigation bar, there are two tabs: 'Review' and 'All'. The 'All' tab is currently selected. Under the tabs, there is a 'Submit Date Range' field with the value '2018/01/01 - 2018/12/31' and a calendar icon. Below that is a search bar with a dropdown menu set to 'Title' and a search icon. At the bottom, there is a 'Report Type' dropdown menu set to 'All'.

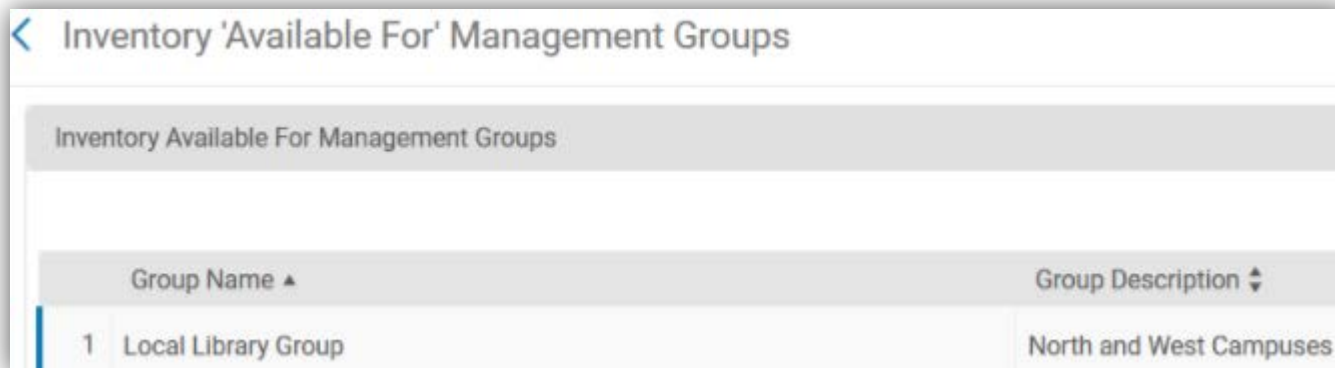


4. Other Tools

- Trial
- Deactivate / Delete Resources
- Community Zone Updates
- Inactive Services or Proxy
- **Manage Patron Access**
 - by campus or library
- **Overlap Analysis**

Manage Patron Access

- Libraries or campuses (or both) must have different IP address ranges
- Alma must be configured for multi-campus inventory management
- Inventory “Available For” Management Groups



The screenshot displays the 'Inventory Available For Management Groups' configuration page in the Alma system. The page title is 'Inventory 'Available For' Management Groups'. Below the title, there is a section header 'Inventory Available For Management Groups'. A table with two columns, 'Group Name' and 'Group Description', is shown. The table contains one entry: '1 Local Library Group' with the description 'North and West Campuses'.

Group Name ▲	Group Description ⇅
1 Local Library Group	North and West Campuses

Overlap Analysis Reports

1. Menu: Resources > Overlap and Collection Analysis
2. Submit New Report
3. Choose Report Type: Set Comparison
4. Add Source Electronic Collection (must be from IZ)
5. Add Target Electronic Collection (can be from IZ or CZ)
6. Choose match method (for example, ISSN, title, 035)
7. Run the job

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5. Next Steps, Support Resources, and Feedback



Next Steps and Resources

- Documentation in the CKC:
 - [Managing Electronic Resources](#)
 - [Electronic Resources – Scenarios and Workflows](#)
- Additional support resources within the Ex Libris ecosystem:
 - [Idea Exchange](#)
 - [Developer Network](#)
- [2018 Technical Seminar Presentations](#) (Cross-Product section of CKC)



Questions?

**What questions
do you have?**





Thank You!

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