

ExLibris
Part of **Clarivate**

IGOLU
International Group of Ex Libris Users

Alma ERM Update

Noam Fass

Alma Product Management

Agenda



ERM Mission



Recent Present and Future



ERM Mission

ERM Mission



Free Time

Automate processes



Provide Insights

Analysis and alerts



Accurate Access

Ongoing process



Customer Delight

Address Idea Exchange



Recent Present and Future



Free Time - Automate Processes

- [Upload Electronic Holdings from Taylor and Francis](#)
- [Upload Electronic Holdings from Wiley](#)
- [Improved ProQuest eBook Central Upload Electronic Holdings](#)
- [eBook Central Upload Electronic Holdings - Addition of Public Access Model Information](#)
- [Public Access Model to Support Subscription Titles](#)
- [Change Electronic Portfolio Information Job Now Supports the Public Access Model](#)
- [Efficient Management of Electronic Resources Using KBART](#)

ERM Mission



Free Time

Automate processes



Provide Insights

Analysis and alerts



Accurate Access

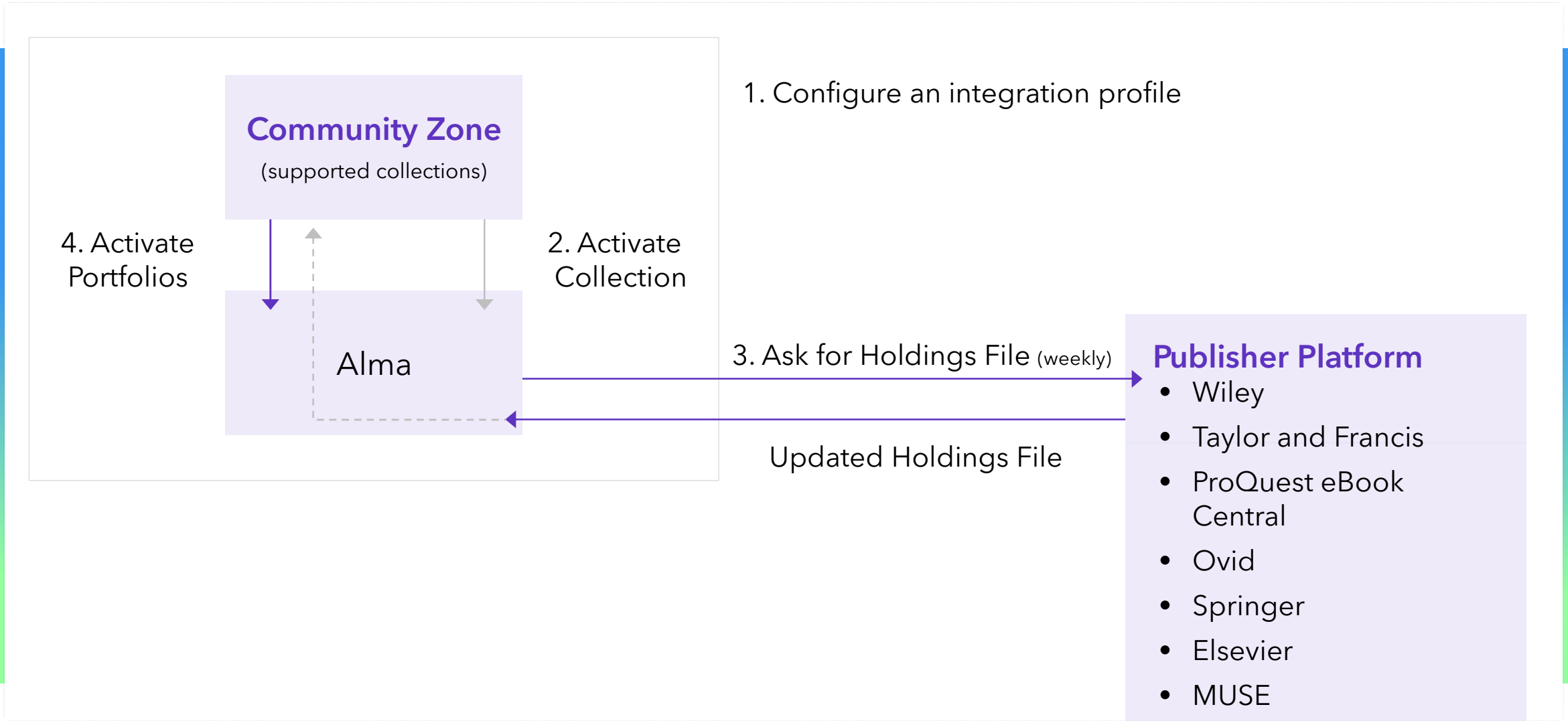
Ongoing process



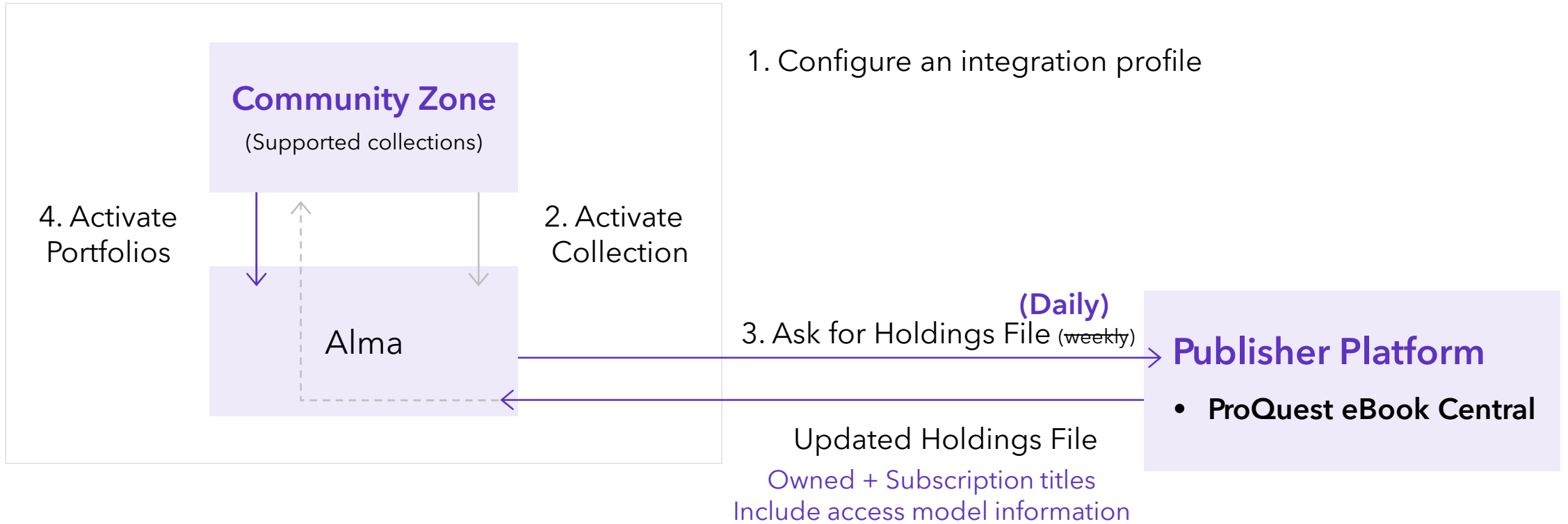
Customer Delight

Address Idea Exchange

Free Time - Automate Processes: Automatic Upload E-Holdings



Free Time - Automate Processes: Automatic Upload E-Holdings





Free Time - Automate Processes Change Portfolio Information

Run a Job - Enter Task Parameters

1 2 3 4 Cancel Back Next

| | | | |
|-------------------------------------|--------------------------------|--|-----------------|
| <input type="checkbox"/> | Remove 'Available For' groups | All PASSORD_GRUPPE | |
| <input type="checkbox"/> | Add 'Available For' groups | All PASSORD_GRUPPE | |
| <input type="checkbox"/> | Electronic Material Type | Book | |
| <input type="checkbox"/> | Remove local coverage | | |
| <input checked="" type="checkbox"/> | Set Public access model | Q look-up or select | Unconditionally |
| <input type="checkbox"/> | Set license | Please note that the platform supports patron driven Please note that the platform supports short term loc | Unconditionally |
| <input type="checkbox"/> | Set PDA | Please note that the platform supports three concurr Please note that the platform supports three concurr | Unconditionally |
| <input type="checkbox"/> | Delete or replace url's prefix | Please note that the platform supports three concurr with | |
| <input type="checkbox"/> | Enable proxy | Please note that the platform supports three concurr Please note that the platform supports three year lice | Unconditionally |
| <input type="checkbox"/> | Set proxy | Please note that the platform supports unlimited acc Please note that the platform supports unlimited acc | Unconditionally |
| <input type="checkbox"/> | Set availability status | Please note that the platform supports unlimited acc | |
| <input type="checkbox"/> | Set available from date | Please note that the platform supports unlimited and 66 Concurrent Users(66U) | Unconditionally |
| <input type="checkbox"/> | Set available until date | | Unconditionally |



Free Time – Automate Processes Portfolio Loader Using KBART

Activation Wizard: File Upload

1 2 Cancel Next

Bibliographic

Select catalog Institution Network

Select File

Format Portfolio Loader Format (Excel) KBART [i](#)

File *

Select Loading Policy

Loading Policy Type Complete Incremental

Select Format

Record Format

Select Action

Add local portfolios

Update portfolios

Delete portfolios

ERM Mission



Free Time

Automate processes



Provide Insights

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Provide Insights - Analysis and Alerts

- [Usage Reflection for Community Zone Collections](#)
- [New Collection Management Level Indication for Community Zone Collections](#)
- [Community Zone Updates Task List to Include Indication Regarding Collection Level Management](#)
- [Management Level Indication Labeled "Pending Deletion" Added for Community Zone Electronic Collections](#)
- [New and Improved Overlap Analysis Tool](#)
- [Overlap Analysis Job Supports Physical as well as Electronic Titles](#)
- [New field 'COUNTER Platform derived from Interface' for Future Optimization of Cost/Usage Reports](#)
- [Option to Delete Portfolios from Community Zone Collections Which are Managed by the Community](#)
- (DARA) [Recommendation to Group Local Standalone Portfolios into Collections](#)



Provide Insights - Analysis and Alerts: Management Level + Usage Reflection

Search in: Electronic collection - Zone: Institution Community

Electronic Collection: Management lev Equals

- Community
- Contributed
- Ex Libris
- Not Maintained
- Pending Deletion

Portfolio List (10302) Activate ...

Europe, Middle East and Africa: 24
North America & Latin America: 246
82

3 **ABC-CLIO Global Perpetual Access** Portfolio List (5252) Activate ...

Collection ID: 61549000000000242 **Management Level:** Ex Libris

MMS ID: 9917564011400041

Type: Selective package

Service: Full Text

Interface name: **ABC-CLIO**

Linking Level: Book

Creation Date: 12/31/2020 11:12

Modification Date: 03/27/2023 01:03

- Asia Pacific: 0
- Europe, Middle East and Africa: 1
- North America & Latin America: 8
- Total Activations: 9

4 **ABC-CLIO History Reference Online Complete** Portfolio List (1574) Activate ...

Collection ID: 61100000000002513 **Provider coverage:** Yes

MMS ID: 995553824700041 **Search Rights in CDI:** Free

Type: Selective package **Full Text Rights in CDI:** Subscription (Collection Level)

Service: Full Text **Full Text Linking in CDI:** Linkresolver

Interface name: **ABC-CLIO** **CDI Collection ID (DB ID):** JQR

Linking Level: Book **CDI Type:** Full Text Collection

Creation Date: 02/03/2010 10:19 **CDI Last Market Update:** 12/04/2023

Modification Date: 05/01/2023 01:02 **Management Level:** Ex Libris

Available for CDI search activation

Asia Pacific: 0

Europe, Middle East and Africa: 0

North America & Latin America: 15

Total Activations: 15




Provide Insights - Analysis and Alerts: Management Level + Usage Reflection

Electronic Collections (1 - 1 of 1) | where (Management level in Community Zone (Electronic Collection) equals "Pending Deletion")

Institution | Community

Sort by : Collection name - Asc

| | | | |
|--|---|--|---|
| <p>1</p>  | <p>VIVA Oxford Scholarship Online Ebooks Type: Aggregator package Service: Full Text Interface name: Oxford Scholarship Online Linking Level: Book Creation Date: - Modification Date: -</p> | <p>Collection ID: 61386000000000856 MMS ID: 9910737834500041 Management Level: Pending Deletion on 13/07/2023 Asia Pacific: 0 Europe, Middle East and Africa: 0 North America & Latin America: 0 Total Activations: 0</p> | <p>Portfolio List (3439) Activate ...</p> |
|--|---|--|---|



Provide Insights - Analysis and Alerts: New and Improved Overlap Analysis Tool

Electronic + Physical Analysis

< Overlap and Collection Analysis (1 - 15 of 15)

Sort by: Creation Date

| | | |
|---|--|---|
| 1 | <input type="checkbox"/> New Report 2022-08-10 11:40:41 Compare Collections | Creator UriB613 Creation Date 08/10/2022 12:40 |
|---|--|---|

X

Compare Collections

...

Analysis Report



74 (19.95%)Titles of Portfolios with no overlap

Titles of the Portfolios of the electronic collection selected for comparison (source) that are not part of the electronic collection/s compared with (target)

297 (80.05%)Titles of portfolios with overlap

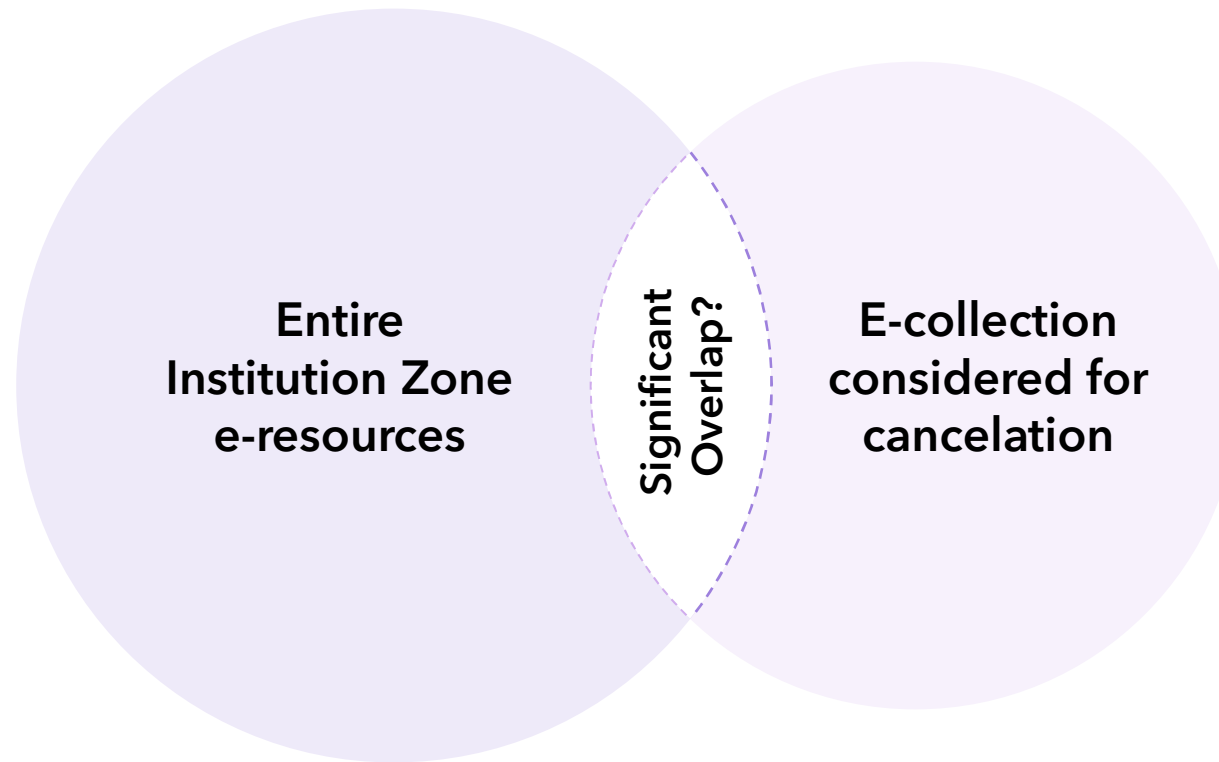
Titles of the Portfolios of the electronic collection selected for comparison (source) that are part of the electronic collection/s compared with (target)



Provide Insights - Analysis and Alerts: New and Improved Overlap Analysis Tool

Example Use Case #1 - Canceling an IZ Electronic Collection

Existing IZ vs Entire IZ

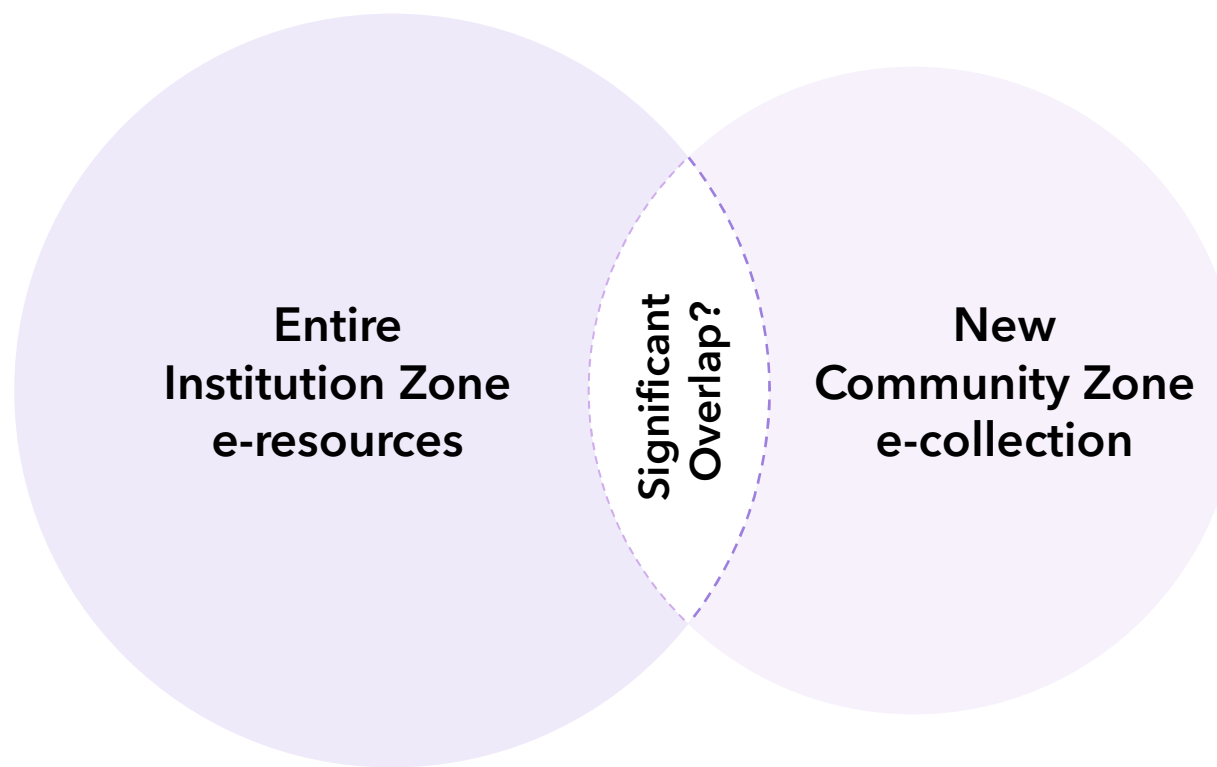




Provide Insights - Analysis and Alerts: New and Improved Overlap Analysis Tool

Example Use Case #2 - Purchasing a New CZ E-Collection

Option #1: New CZ vs Entire IZ

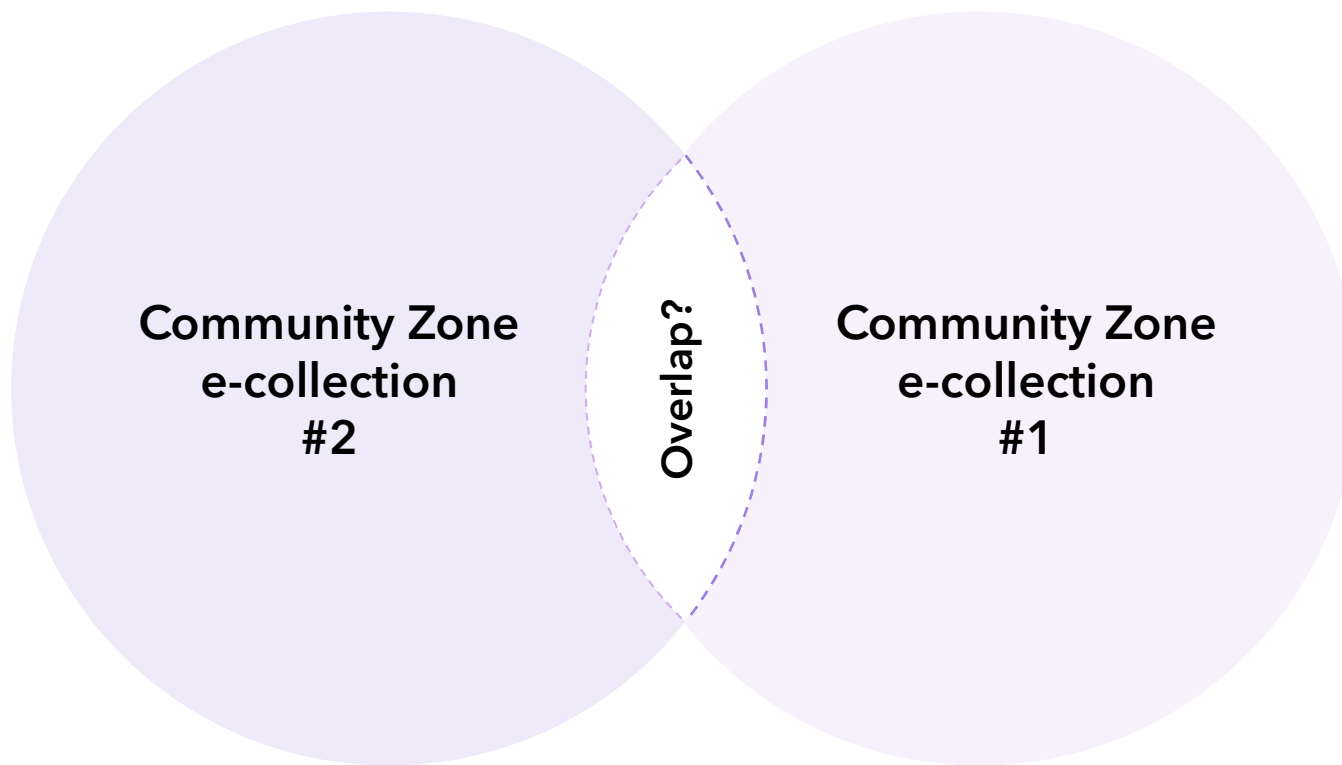




Provide Insights - Analysis and Alerts: New and Improved Overlap Analysis Tool

Example Use Case #2 - Purchasing a New CZ E-Collection

Option #2: New CZ #1 vs New CZ #2

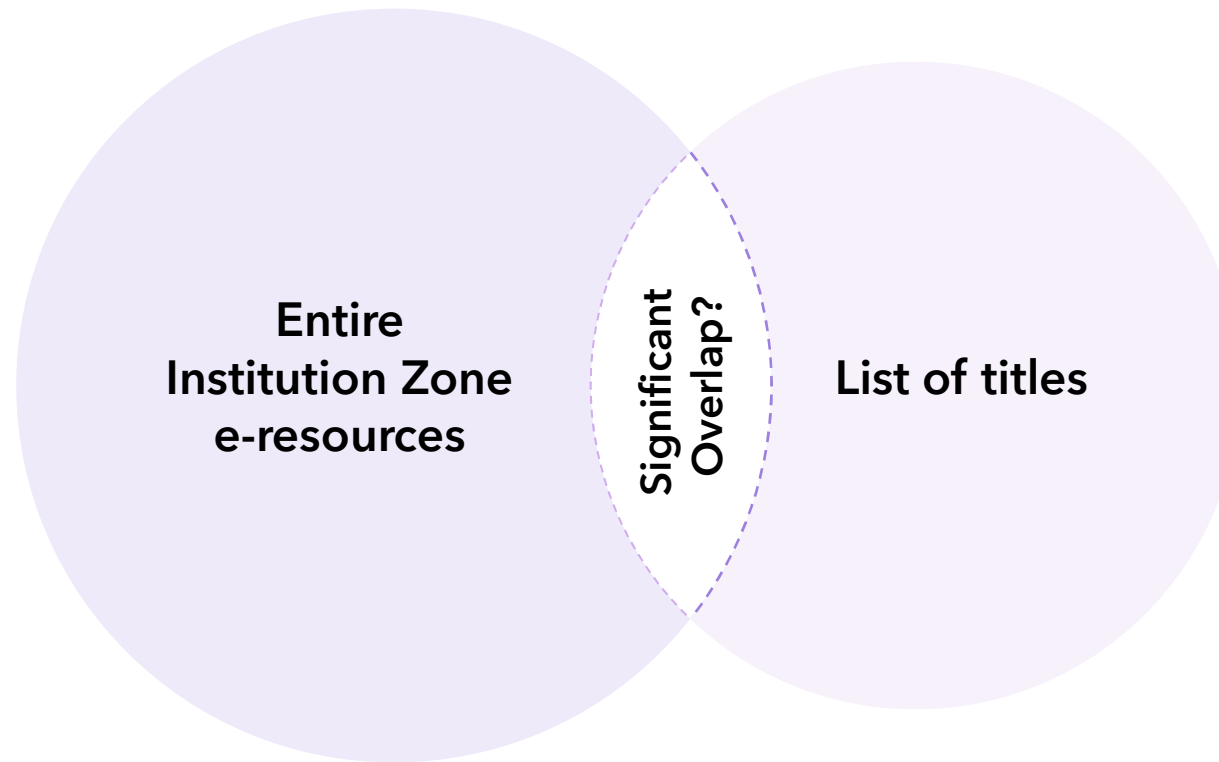




Provide Insights - Analysis and Alerts: New and Improved Overlap Analysis Tool

Example Use Case #3 - Purchasing List of Titles

List of Titles vs Entire IZ





Provide Insights - Analysis and Alerts: New and Improved Overlap Analysis Tool

Electronic + Physical Analysis

Drop a file or [Select or drag an Excel File \(.xlsx or .xls\)](#)

Select the populations you would like to compare the titles from the input file with:*

- Institution Zone electronic resources (including Community Zone activated electronic resources)
- Community Zone non-activated electronic resources
- Institution Zone physical resources

Additional Details

- Include related titles indication

Choose the report output format*

- One excel line per match
- One excel line per identifier from input file

ERM Mission



Free Time

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Accurate Access

Ongoing process



Customer Delight

Address Idea Exchange



Customer Delight - Address Idea Exchange

- [Portfolio Loader/Export - Support Split Coverage](#)
- [A New Page Action Save and Test Access Was Added When Creating a New Portfolio](#)
- [Batch Update Electronic Collection Attributes](#)
- [Control the Availability of Portfolios Automatically at a Pre-defined Date](#)
- [Electronic Service - Expiry Date Option for the Service Temporarily Unavailable Message](#)
- [Activation Notes in Electronic Resource Activation Task List](#)

ERM Mission - Future Perspective



Free Time

Automate processes

SAGE + EBSCO + Taylor & Francis Journals + Preselect + JSTOR



Provide Insights

Analysis and alerts

Intuitive CZ updates task list alerts
Usage indication in overlap analysis tool
MARC record quality measures for CZ collections



Accurate Access

Ongoing process
Selected metadata elements in GES



Customer Delight

Address Idea Exchange
Enhance user experience

ERM Mission - Future Perspective



Provide Insights

Intuitive CZ updates task list alerts

MARC record quality measures for CZ collections

Community Zone Updates Task List

Review All

Submit Date Range: 07/01/2015 - 07/23/2015

1. This selection should impact the chart results and counters

2. Click on this

3. Will populate this

1 - 20 of 858

Report Type: Portfolio coverage update

| Report Type | Electronic Collection Name | Title | Identifier | Subn Date | Available For | Before Change | After Change | Local Information |
|--------------------|----------------------------|-------|------------|-----------|---------------|---------------|--------------|-------------------|
| Portfolio coverage | | | | | All | | | |

Electronic Collections (1 - 20 of 17,811)

Institution Community

Sort by: Collection name - Asc

101communications Publications

Type: Selective package
Service: Full Text
Interface name: 101communications
Linking Level: Journal
Creation Date: 06/06/2018 23:03:54 PM IDT
Modification Date: 10/07/2023 13:00:13 PM IDT

Collection ID: 614330000000001259
MMS ID: 9910811807300041
Management Level: Ex Libris

Asia Pacific: 2
Europe, Middle East and Africa: 1
North America & Latin America: 9
Total Activations: 12

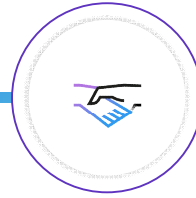
Portfolio List (30)

Bibliographic Rank
Average: 55.1
High: 20%
Medium: 40%
Low: 40%

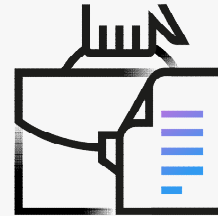
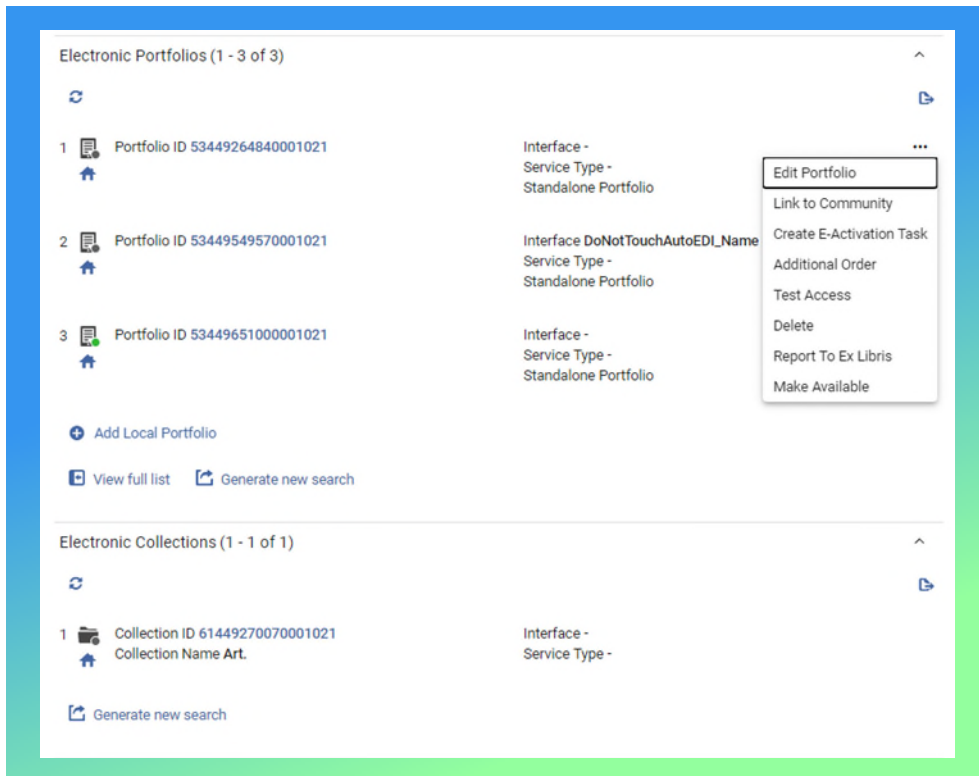


**Questions?
Ask Me Anything!**

ERM Mission - Future Perspective



Customer Delight Enhance user experience



Want to be part of our
“early adopters” group?

Contact me!

Noam.Fass@clarivate.com

ExLibris
Part of **Clarivate**

IGOLU
International Group of Ex Libris Users

Thank you!

Noam.Fass@clarivate.com

About Clarivate

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Developments 2022/23 (Release Notes)

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- [Report to Ex Libris Action Removed from Electronic Collections Whose Management Level is not "Ex Libris"](#)
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