VERDE VERSION 2.0

Training Exercises

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2 Verde Interface

2.1 KB Manager – Searching

Task:
Your library is considering purchasing an online subscription to the journal, *Physical Review A*. Search for this e-resource to determine which vendors offer this title.

- ✓ Explore the available searching options and determine which options are best suited to the search.
- ✓ Examine the results of the search and identify the various e-product levels that are presented.
- ✓ Compare the volume and date ranges of the content offered by each vendor.
- ✓ Familiarize yourself with the layout and navigation of the search results screen.
- ✓ Use truncation and Boolean operators to adjust your search.

Suggested actions:

1. Select **KB Manager** from the top menu bar
2. Select **Managing:** *e-Products*
3. **Find:** *physical review a* **By:** *Title* **Type:** *Exact Match*
   e-Product Type: *e-Constituent* **Find All**
4. View the e-Product records: work, constituent, package and interface, by selecting the linked icons or titles.
5. Use the navigation "crumbs" to navigate back to your original search results screen.
6. Try a similar search, using truncation symbols (* or ?). For example, search for *physic* review* to retrieve titles including *Physics Review* and *Physical Review*.
7. Try another search, using Boolean operators (AND, OR, NOT). For example, search for *physical AND review NOT chemistry* to retrieve works containing the terms "physical" and "review" but not "chemistry."
8. Refer to Section 2.2 – **KB Manager: Searching e-Products** – in the *Verde User Guide* for more information.

2.2 KB Manager – Search and Display

Task:
Your library wants to purchase a package of e-books. Evaluate and compare the following e-packages:

- *eBrary Academic Complete*
- *netLibrary*
- *Wiley Interscience Online Books*

✓ Search for these packages and summarize your conclusions about the content of each package.

✓ How many constituents does each package have?

Suggested actions:

1. Select **KB Manager** from the top menu bar
2. Select **Managing:** *e-Products*
3. **Find:** *eBrary* **By:** *All* **Type:** *Contains*
   e-Product Type: *e-Package* **Find All**
4. Select the appropriate package from the search results. Select the package list icon to view the package constituents.
5. Use the filters on the package list screen to compare the results when filtering by e-product status, selection status, Display Local and Display All.
6. Repeat for additional e-packages.
7. Refer to Sections 2.2 and 2.4 – **KB Manager: Searching e-Products and KB Manager: e-Product Lists** – in the *Verde User Guide* for more information.

2.3 KB Manager – Search Options

Task:
A faculty member is looking for a journal with the word "astrobiology" in the title. You want to check both your local e-holdings and everything that is available to help her find what she needs. She is also looking for a second journal, but wrote down only the ISSN, not the title. You need to help her identify the journal.

- ✓ Search your library's current e-resource holdings for titles with the word *astrobiology.*
- ✓ Identify additional journals with the word *astrobiology* in the title.
- ✓ Execute searches using different indexes.

Suggested actions:

1. Select **KB Manager** from the top menu bar
2. Select **Managing:** *e-Products*
3. **Find:** *astrobiology* **By:** *Title* **Type:** *Contains*
   Find Local
   - ✓ How many items did you find?
4. **Find:** *astrobiology* **By:** *Title* **Type:** *Contains*
   Find All
   - ✓ How many items did you find?
5. **Find:** 0004-6337 **By:** *Identifier* **Type:** *Contains*
   Find All
   - ✓ Note the difference between the **Identifier** index and the **Verde Identifier** index.
   - ✓ **Identifier** refers to standard identifiers such as ISSN, ISBN, LCCN, etc. These are located in the **Work** record.
   - ✓ **Verde Identifier** refers to Ex Libris identifiers such as SFX ID, Verde e-product code, etc. These identifiers are located on the **e-Product > Interoperability** tab, and also in the **Work** record.
6. Refer to Section 2.2 – **KB Manager: Searching e-Products** – in the *Verde User Guide* for more information.

3 Libraries in Verde

3.1 Create Library Records with Contacts

Task:
You need to enter a record for a new library. The library will be an institute called *[Your Name] Library*.

- ✓ Is this library already a part of your installation?

Suggested actions:

1. Select **Libraries** from the **Managing** pull down menu.
2. Search the library list to make sure this library does not already exist.
3. Create a new library with an *institute* role, called *[Your Name] Library*.
   - ✓ Add a contact (yourself) to this library.
   - ✓ Assign multiple roles to the contact.
4. Refer to Section 2.17 – **KB Manager: Libraries** – in the *Verde User Guide* for more information.

4 Organizations in Verde

4.1 Create Organization Records with Contacts

Task:
You need to enter a record for a new vendor that your library would like to work with. The organization will be called *[Your Name] Journals Ltd.*

- ✓ Does this organization already appear on your organization list?

Suggested actions:

1. Select **Organizations** from the **Managing** pull down menu.

2. Search the organization list to make sure this organization does not already exist.

3. Create a new organization called *[Your Name] Journals Ltd*. Give it a *vendor* role.

    - ✓ Add a few contacts to the organization.

    - ✓ Assign roles to these contacts.

    - ✓ Mark one of the contacts as a *Main Contact*. Notice that you cannot delete him/her.

4. Select **e-Products** from the **Managing** pull down menu.

5. Go to any e-product record and use the organizations/libraries/contacts lookup function ... found after appropriate fields within many e-product attributes. For example, Acquisitions records have a lookup for the "Vendor" field, while License records have lookups for the "Licensor" and "Licensing Agent" fields.

    - ✓ Imagine that the Organization you are looking for does not appear in the list. You can add it from this area by using the 'New' button that appears on the top of the Organization pick-up list.

6. Refer to Section 2.16 – **KB Manager: Organizations** – in the *Verde User Guide* for more information.

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5 e-Product Attribute and Lifecycle

5.1 e-Resource Life Cycle: Aggregator Package

Task:
You are purchasing an aggregator package. Reflect the evaluation, approval, acquisitions, licensing, implementation, and activation procedures in Verde.

Suggested actions:

1. Locate a non-active aggregator package record and set the **Selection status** to *Evaluation*.

   ✓ Observe the effect on the package's constituent records.

   ✓ With an aggregator package, it is not necessary or possible to evaluate constituents independently of their package.

2. Approve the package by setting the **Selection** status to *Final Approval*.

   ✓ Observe the effect on the package's constituent records.

3. Set the **e-Product status** to *Implementation 1/2/3* as you move through your local implementation procedures.

4. Create acquisitions and license records for the package.

   ✓ Notice the inheritance of these attributes to the constituent records.

5. Once all of the necessary details are recorded, update the **e-Product status** to *Production*.

   ✓ Observe the effect of this action on the package's constituent records.

6. Refer to Section 2.7 – **KB Manager: Selection Workflows** – of the *Verde User Guide* for more information.

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5.2 e-Resource Life Cycle: Selective Package

<u>Task:</u>
You are purchasing a selective package. Reflect the evaluation, approval, acquisitions, licensing, implementation, and activation procedures in Verde.

<u>Suggested actions</u>:

1. Locate a non-active selective package record and set the **Selection status** of the constituents and the package to *Evaluation*.

    ✓ Open the package list.

    ✓ Select the large 'Update' button at the top right of the list to set statuses for the package and the contents of the list.

    ✓ Update the **Selection status** to *Evaluation*, making sure that you also check the *Update e-Package* option.

    ✓ Observe the changes that take place in the package and constituents.

2. With a selective package, you have the opportunity to evaluate, approve and reject constituents independently of their package.

    ✓ Approve or reject individual constituents from the package, either one at a time, or by using the basket function to update a group of constituents at once.

3. Finalize the package approval by setting the **Selection** status to *Final Approval*.

    ✓ Open the package list and filter it to display only the constituents that are approved for inclusion in the package.

    ✓ Select the large 'Update' button at the top right of the list to set statuses for the package and the contents of the filtered list.

    ✓ Update the **Selection status** to *Final Approval*, making sure that you also check the *Update e-Package* option.

    ✓ How do *Approved* constituents now appear?

    ✓ How do *Rejected* constituents now appear?

4. Create acquisitions and license records for the package.

    ✓ Notice the inheritance of these attributes to the constituent records.

5. Once all of the necessary details are recorded, update the **e-Product status** to *Production* using the package list process described above.

    ✓ Observe the effect of this action on the package's constituent records.

6. Refer to Section 2.7 – **KB Manager: Selection Workflows** – in the *Verde User Guide* for more information.

5.3 e-Resource Life Cycle: Subscription Review

Task:
At the end of the year you need to review subscriptions to electronic journals. Choose the selective package you worked with in the previous exercise and start its review process. As a result of the review the subscription will be renewed.

Suggested actions:

1. Open the package list and use the large 'Update' button at the top right of the list to set statuses for the package and the contents of the list.

   - ✓ Update the **Selection status** to *Review*, making sure that you also check the *Update e-Package* option.
   - ✓ Observe the effect on the package's constituent records.
   - ✓ How are constituents that were previously in *Production* and *Rejected* affected?

2. From the package list, evaluate each constituent to determine if it will be approved or rejected. Approve or reject constituents individually or by using the basket.

3. The package will be approved, so update the **Selection status** to *Final Approval* using the Update tool available from the package list. Make sure to check the *Update e-Package* option.

   - ✓ Observe the effect on the package's constituent records.

4. Now repeat this exercise, but as a result of the review the package will be rejected. (In step 3 the **Selection status** will be set to *Rejected*.)

   - ✓ Observe the effect on the package's constituent records.

5. Refer to Section 2.7 – KB Manager: Selection Workflows – of the Verde User Guide for more information.

5.4 Create a Work Record and a Constituent

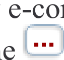
<u>Task</u>:
You are thrilled to learn that the book you recently wrote and published is now being offered through the *Books24x7 FinancePro* package. The book is entitled *[Your name]'s Guide to Personal Finance*.

- ✓ Verify that this e-product does not already exist in the Knowledge Base.
- ✓ Create a new work record for this e-book.
- ✓ Determine which fields are mandatory.
- ✓ Create an e-constituent record for this e-product and link it to the appropriate e-package.

<u>Suggested actions</u>:

1. Search the KB for your new book to verify that it does not already exist.
2. From the **KB Manager**, press the 

button.
3. Fill in the appropriate fields on the form, and press the 'Submit' button.
4. Create a new e-product 

(type: e-constituent) from your work record.
5. Notice that the new e-constituent record has an entry labeled **Belongs to Package**…select the  icon to display a list of all available packages.
   - ✓ Use the **Jump to** field to go directly to the package you want.
6. Once you have selected the package, save the constituent record by pressing **Submit**.
   - ✓ You will now see the new e-constituent record and its e-product relationship (package > interface).
7. Refer to Sections 2.3 and 2.6 – **KB Manager: Work Records and KB Manager: The e-Product Record** – in the *Verde User Guide* for more information.

5.5 Create, Link and Activate New e-Products using Quick Add

Task:
Your library just subscribed to an online encyclopedia that is not represented in the KnowledgeBase. The topic of the encyclopedia is the city in which you were born. The encyclopedia became available to your library users today.

- ✓ Create the appropriate records for this e-product and link them together using the Quick Add wizard.
- ✓ Reflect the availability of this resource in Verde.

Suggested actions:

1. Search the KB for an e-product named after your city of birth to verify that it does not already exist.
2. Select the **Quick Add** icon on the top right of the KB Manager screen.
3. In step one of the Quick Add wizard, select the type **e-Standalone** for your new resource, and go to the next step.
4. In step two, fill in the mandatory fields and any other information you choose.
5. In step three, you may fill in the **e-product** and **selection statuses**, and the **activation from** date for your new e-product.
    - ✓ To indicate the availability as described above, set the **e-product status** to *Production* and the **Activation from** date to today's date.
6. In step four, you have the option of creating a new interface record to which this standalone will be linked, or selecting an existing interface from the list of all interfaces.
    - ✓ Notice that the title of the standalone is filled into the interface title field by default. This field should be edited if you wish to create a new interface and its title differs from the standalone's title.
7. In step five, you have the choice to close the Quick Add wizard, start again to create another new product using the Quick Add wizard, or open the e-product that you just created for further editing.
8. Refer to Section 2.2.3 and 2.7.6 – **KB Manager: Searching e-Products: Quick Add** and **KB Manager: Selection Workflows: Activation** – in the *Verde User Guide* for more information.

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5.6 Delete a Locally Created e-Product and its Work Record

Task:

You are devastated to learn that the *Books24x7 FinancePro* package has decided to no longer include your book, *[Your name]'s Guide to Personal Finance* (see Exercise 5.4). You want to delete this e-product from Verde.

- ✓ Determine if it is possible to delete an active e-product.
- ✓ Delete the e-product once it is possible to do so.
- ✓ Delete the associated work record.

Suggested actions:

1. Locate the work record for your e-product
   - ✓ Notice that the delete button will not appear if an e-product is attached to the work record.
2. Locate the e-constituent for your book.
3. If the e-constituent is not already active, activate it (change e-Product status to Production either in the e-product general information tab, or by selecting Update and Activate from the e-package list).
4. Look for the delete button to delete the record. It will not appear if the e-product is active.
5. Change the **e-Product status** and **Activation from date** to blank.
6. Look for the delete button again.
7. Delete the e-product.
8. Locate the work record and delete it.
   - ✓ Notice that the work record can now be deleted because the attached e-product has been deleted.
9. Refer to Sections 2.6.3 and 2.3 – **KB Manager: The e-Product Record: Deleting e-Product Records** and **KB Manager: Work Records** – in the *Verde User Guide* for more information.

6 License Attribute and Lifecycle

6.1 Create a License Record

Task:
Your library has purchased a new package:

- ✓ Choose your favorite package to work with.
- ✓ Create a license record for this package.

Suggested actions:

1. Locate your e-package and navigate to the License screen.
2. Create a new license record using only the mandatory fields at first.
   - ✓ Which fields are mandatory?
3. Drive the record through the licensing process by updating the status and other information as you go, ending with an *Approved* license status. Set the end date to reflect that the subscription is about to expire.
   - ✓ How do the mandatory fields change as you move through the licensing process?
   - ✓ Start thinking about the licensing workflow in your library. How might you want to customize the labels for the **License status** field?
4. Go to the package list to view some individual e-constituent records.
   - ✓ What is the effect of the package-level license record on the constituents?
   - ✓ Does this differ between selective and aggregator packages?
5. Refer to Section 2.9 – **KB Manager: License** – of the *Verde User Guide* for more information.

6.2 Renew a License

Task:
The license for the package you worked with in the previous exercise is about to expire.

- ✓ Renew the package's license record.

Suggested actions:

1. Locate your e-package and navigate to the License screen.
2. Use the edit icon to go to the license.
3. Set the License end date to reflect that the license is about to expire.
4. Renew the license record using the Renew button Renew.
   - ✓ The **License status** must be *Approved* for the **Renew** button to appear.
5. Observe the effect of the renewal on the license record.
   - ✓ What has changed?
   - ✓ Check the summary and brief summary displays to see if these changes are reflected there.
6. Later you will see how license records can be automatically renewed using **KB Tools Tasks**.
7. Refer to Section 2.9 – **KB Manager: License** – in the *Verde User Guide* for more information.

6.3 Create and Delete License and Prevailing Terms Records at Various e-Product Levels

<u>Task</u>:
Your library has purchased an additional title available through the same package you worked with in the previous exercise. As a result, an individual license was issued for this e-constituent.

- ✓ Make sure that the package you have been working with has a license record.
- ✓ Select one of the e-constituents from your e-package and create a license record at the e-constituent level.
- ✓ If both licenses are active (license status = *Approved*), create the necessary **Prevailing Terms** record.
- ✓ Understand the terms under which a license record can be deleted.

<u>Suggested actions</u>:

1. Distinguish between inherited and directly linked license records.
   - ✓ How are they different?
   - ✓ How does the appearance of the License tab change?
   - ✓ What additional button appears on the License list once there is more than one **approved** license?
   - ✓ Which types of license records can be edited at which e-product levels?
2. Notice the **Add Prevailing** Terms button that appears in the License list once there is more than one approved license present.
   - ✓ Add prevailing terms to resolve any conflict between the two licenses.
3. From the constituent record, open the license record that was created at the package level and look for the delete  icon.
   - ✓ Is it there?
   - ✓ To be eligible for deletion, a license record must have a **License status** other than *Approved* or *Retired*.
   - ✓ Is it possible to delete a license that was inherited from a higher level e-product?
4. Navigate to the “native” level of the license and update it as required to enable deletion. Delete the license record.
5. Refer to Section 2.9 – **KB Manager: License** – in the *Verde User Guide* for more information.

6.4 Link License Records

Task:

Your library acquired several packages that are covered by one license.

- ✓ Reflect this in Verde using the **Link License** function.
- ✓ Come up with two or more packages that you will use for this exercise.

Suggested actions:

1. Start with a package record that includes an approved license record.
2. Make note (copy to the clipboard) of the **License Code**.
3. Access the record of another package that is covered by the same license.
4. Use the **Link License** 

button to link the license record of the first package to the second package.
5. Make changes to the license record in either package.
   - ✓ Observe how the changes are reflected in both license records
   - ✓ Select the **Related** tab from either license record to identify the e-products that share the license
6. Link the license record to additional e-products if you wish.
7. Refer to Section 2.9 – **KB Manager: License** – in the *Verde User Guide* for more information.

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7 Acquisitions Attribute and Lifecycle

7.1 Create Acquisitions and Local Acquisitions Records

Task:
Your library is purchasing a package and distributing the expenses between two libraries within your institution.

- ✓ Choose your favorite package to work with.
- ✓ Create an acquisitions record and local acquisitions records for this package.

Suggested actions:

1. Locate your e-package and navigate to the Acquisitions screen.
2. Create a new acquisitions record (‘New ACQ’) using only the mandatory fields at first.
   - ✓ Which fields are mandatory?
3. Drive the record through the acquisitions process by updating the status and other information as you go, ending with an *Active* acquisitions status. Set the end date to reflect that the subscription is about to expire.
   - ✓ Start thinking about the acquisitions workflow in your library. How might you want to customize the labels for the **Acquisitions status** field?
4. Click the Add Local ACQ button to create a local acquisitions record for each participating library, indicating the cost-sharing.
   - ✓ Use the **Collapse all** button to see the participating libraries at a quick glance.
5. Go to the package list  to view some individual e-constituent records.
   - ✓ What is the effect of the package-level acquisitions record on the constituents?
6. Refer to Section 2.6 – **KB Manager: Acquisitions records** – in the *Verde User Guide* for more information.

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7.2 Renew an Acquisitions Record

Task:
The subscription for the package you worked with in the previous exercise is about to expire.

- ✓ Renew the package's acquisitions record.

Suggested actions:

1. Locate your e-package and navigate to the Acquisitions screen.
2. Go to the **ACQ** tab.
3. Set the end date to reflect that the subscription is about to expire.
4. Renew the acquisitions record using the **Renew** button 

.
   - ✓ The **Acquisitions status** must be *Active* for the **Renew** button to appear.
5. Observe the effect of the renewal on the acquisitions record.
   - ✓ What has changed?
   - ✓ Check the summary and brief summary displays to see if these changes are reflected there.
6. Later you will see how acquisitions records can be automatically renewed using **KB Tools Tasks**.
7. Refer to Section 2.6 – **KB Manager: Acquisitions records** – in the *Verde User Guide* for more information.

7.3 Create and Delete Acquisitions Records at Various e-Product Levels

Task:
Your library purchased a selective package, and an acquisitions record was created to reflect the order for that e-product. Several months later, your library chose to purchase an additional title available through the same package. As a result, an individual acquisitions record is required for this e-constituent.

- ✓ Check to see if the package you have been working with in these exercises is selective or aggregator.
    - o If it is selective, continue working with the record.
    - o If it is aggregator, find another package of your choosing that is selective and create an acquisitions record if necessary.
- ✓ Understand the terms under which an acquisitions record can be deleted.

Suggested actions:

1. Select one of the e-constituents from your e-package and create an acquisitions record at the e-constituent level.
2. Distinguish between inherited and directly linked acquisitions records.
    - ✓ How are they different?
    - ✓ How does the appearance of the Acquisitions tab change?
    - ✓ Which types of acquisitions records can be edited at which e-product levels?
3. From the constituent record, open the acquisitions record that was created at the package level and look for the delete  icon.
    - ✓ Is it there?
    - ✓ To be eligible for deletion, an acquisitions record must have **Acquisitions status** *New* and not have any attached **Invoice** or **Local acq** records.
    - ✓ Is it possible to delete an acquisitions record that was inherited from a higher level e-product?
4. Navigate to the "native" level of the acquisitions record and update it as required to enable deletion. Delete the acquisitions record.
5. Refer to Section 2.8 – **KB Manager: Acquisitions Records –** in the *Verde User Guide* for more information.

7.4 Link Acquisitions Records

Task:
Your library purchased several packages from one vendor. One order was issued for this purpose.

- ✓ Decide on two or more packages that you will use for this exercise.
- ✓ Reflect this in Verde using the **Link ACQ** function.

Suggested actions:

1. Start with a package record that includes an active acquisitions record.
2. Make note (copy to the clipboard) of the **ACQ Number**.
3. Access the record for another package that your library has purchased with the same order.
4. Use the **Link ACQ** 

button to link the acquisitions record for the first package to the second package.
5. Make changes to the acquisitions record in either package (add a **Local ACQ** record, **Renew** the record, etc.)
6. Observe how the changes are reflected in both acquisitions records
7. Select the **Related** tab from either acquisitions record to identify the e-products that share the acquisitions record.
8. Link the acquisitions record to additional e-products if you wish.
9. Refer to Section 2.6 – **KB Manager: Acquisitions records** – in the *Verde User Guide* for more information.

8 Cost, Usage, Access and Admin Records

8.1 Working with Access Records

Task:
You want to store access information about a package that is accessed via the web.

- ✓ Choose an e-package and create an Access record with the relevant access information.
- ✓ Reflect the accessibility of the package to selected libraries within your institution.

Suggested actions:

1. Decide on which level (e-constituent, e-package, or e-interface) the access information should be stored.
2. Go to the **Access** attribute tab and create a new WWW access record by clicking on and entering the relevant data on the **WWW – Data** tab.
3. Go to the **WWW- Access Authorization** tab.
4. Experiment with the options in the Action column to reflect which library has been authorized to access your e-package.
5. Once you have selected the library you want, click the icon to record additional details.
6. If the access record is created on the parent level, check to see if it is inherited by the children.
7. Check to see how the access record is represented on the summary screen, and the option to link to it directly.
8. Refer to Section 2.10 – **KB Manager: Access Records** – in the *Verde User Guide* for more information.

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8.2 Working with Admin Records, Breach and Incident Logs

Task:
You need to track problems with a package. Excessive downloading has been reported by the provider, but you have also had difficulty connecting at times.

- ✓ Create an **Admin** record for the product you worked with in the previous exercise .
- ✓ Include breach and incident logs.

Suggested actions:

1. Locate an e-package and go to the **Admin** tab.
2. Fill in any information relevant to your e-product on the first Admin tab. If there are administrative details specific to one of the libraries within your institution, enter this information in the second tab, Local Admin.
3. Create Incident and Breach records to describe events that could occur in your library.
   - ✓ Think about the incident and breach **types**, and how your library would customize those labels.
4. Note the difference between the **Admin** e-product attribute and the **Admin** link that may appear in the main Verde header menu bar.
   - ✓ The **Admin** link in the header menu is context sensitive and only appears for Verde users with *Administrator* privileges.

   

5. Refer to Section 2.11 – **KB Manager: Admin Records** – in the *Verde User Guide* for more information.

8.3 Copy and Paste Access and Admin Records

Task:
One of your e-products has access and administrative terms that are similar to another e-product's terms that have already been input into Verde. Copy and paste the terms between e-products.

- ✓ Use the copy and paste function within Verde to copy the existing **Access** and **Admin** records to another e-product.
- ✓ Update the copied records as needed.

Suggested actions:

1. Find an e-product with Access or Admin records.
2. Viewing each full Access or Admin attribute record, notice the **copy** icon that appears. Use this button to copy the attribute to the clipboard.
   - ✓ Notice the appearance of the **View Clipboard** button near the top of the screen.
   - ✓ To verify the contents of the attribute you copied, select the **View Clipboard** icon.
3. Navigate to the package to which you will paste this attribute record.
4. Press the corresponding attribute tab, and notice the **paste** icon that now appears there.
5. Refer to Sections 2.11 and 2.5.5 – **KB Manager: Admin Records** and **KB Manager: e-Products and their Attribute Records: Copy and Paste of e-Product Data –** in the *Verde User Guide* for more information.

8.4 Creating Cost and Usage Records

Task:
Your collection development librarians want to use usage data and pricing information as part of their renewal decision making.

- ✓ Create **Cost** and **Usage** records to store this information for the e-package of your choice.

Suggested actions:

1. Locate an e-package.

2. Go to the **Cost** tab and create a new cost record.

3. Fill in any information relevant to your e-product and submit the record.

   - ✓ Cost records are intended to be used for collection development decisions and do not necessarily contain the same information as Acquisitions records.

4. Go to the **Usage** tab and create a new usage record.

5. Fill in any information relevant to your e-product and submit the record.

   - ✓ For example, create a usage record to indicate that for the most recent month, 125 searches were executed on this resource. Create another usage record to indicate that in the same month, 36 full text requests were placed.

6. View the package list to observe the inheritance properties of **Cost** and **Usage** records to child (in this case e-constituent) level e-products.

   - ✓ Are cost and usage records inherited by child records?

7. Refer to Sections 2.13 and 2.14 – **KB Manager: Cost Records** and **KB Manager: Usage Records** – in the *Verde User Guide* for more information.

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9 Trial Records

9.1 Create a Trial Record and Conduct a Trial

Task:
Your library is considering purchasing a package, and has arranged trial access to the package to conduct a formal evaluation.

- ✓ Choose your favorite package to work with.
  - o Choose a package that has not already been activated.
- ✓ Create a trial record for this package and drive it through the trial process.

Suggested actions:

1. Locate your e-package and first make sure that the package is not active. Although it is possible to conduct a trial on an active package, we will not do so in this exercise.
2. Navigate to the Trial screen.
3. Change the **Trial Status** to *On Trial*.
   - ✓ Which fields become mandatory as a result?
4. Submit your trial record.
5. Go to the **e-Product** screen.
   - ✓ Notice how the **e-Product Status** and **Selection Status** fields have been updated to reflect the trial.
   - ✓ These statuses will continue to be automatically updated as the trial progresses.
6. View the package list.
   - ✓ Is the trial information inherited by the constituents?
7. If the package you are working with is selective, you will now have the opportunity to review the constituents from the package list and update the selection status of each one using the update button Update.
   - ✓ Approve or reject individual constituents in the package.
8. If you are working with an aggregator package, all constituents are automatically included so you do not have the option to approve or reject individual items.
9. Assume that after the trial the e-product is approved. Update the **Trial status** to *Trial over*, and the **Purchase decision** to *Purchase*. Note that you will need

to update the **Trial end date** to the current date or earlier to allow the trial to be ended.

- ✓ Start thinking about the trial workflow in your library. How might you want to customize the labels for the **Trial status** field?

10. Notice how the e-product **selection status** is updated.

11. Note that trial management tasks can be run from the **KB Tools** menu. We will learn more about that later.

12. Refer to Section 2.12 – **KB Manager: Trial Records –** in the *Verde User Guide* for more information.

9.2 Manage Trial Participants

Task:
Of course, to conduct a trial on an e-product, there must be participants at your library who are responsible for participating in the trial, evaluating the resource and giving feedback.

- ✓ Choose your favorite package to work with.
- ✓ Create a trial record for this package.
- ✓ Create records for the trial participants.

Suggested actions:

1. Locate your e-package, navigate to the Trial screen, and create a new trial record.
2. Add a trial participant.
3. Select the name of the trial participant from the library contacts list: ... .
    - ✓ Note that library contacts with a role of *Selector* will be included in the list of possible trial participants.
4. Submit the record.
5. Repeat the process for additional participants.
6. Collapse all of the participant entries to view the participants' conclusions at a quick glance.
7. Note that trial participant alerts can be run from the **KB Tools** menu. We will learn more about that later.
8. Refer to Section 2.12 – **KB Manager: Trial Records** – in the *Verde User Guide* for more information.

10 Workflow

10.1 Acquisitions and License Workflows

Task:
Use the Acquisitions and License Workflow engines to guide you through the Acquisitions and License tasks that you have previously worked on manually.

Suggested actions:

1. Go to an untouched package record.

2. Navigate to the **Workflow** attribute tab.

3. Select the **'Add New'** icon and choose to begin the Acquisitions workflow.

   ✓ Notice that the workflow icon appears on the relevant attribute record once a workflow is in process, and serves as a link to the appropriate workflow attribute.

   ✓ Note that Acquisitions and License workflows can also be triggered by the Trial decision to Purchase.

4. Once the Acquisitions workflow has been started, select the **'Acquisitions Workflow'** link to view the first task in the workflow.

5. After each task is completed, move on to the next task in the workflow.

   ✓ Notice that some workflow tasks need to closed manually (for example, by indicating that an external procedure is done)

   ✓ Other workflow tasks are closed automatically by the system once the task's condition has been met (for example, the task 'Create a new acquisitions record' will be closed automatically once you create the acquisitions record).

6. Use the **Comments** field to enter comments about any workflow task. These comments will appear throughout the workflow.

7. Use the **'link to Verde'** links to go to the appropriate area within Verde to accomplish some tasks.

8. Repeat the same exercise with the License workflow.

9. All of the text within the workflow (task title, description, etc.) can be customized for your institution.

   ✓ Think about ways in which you would like to customize Verde workflows.

10. Refer to Section 2.15 – **Workflow** – in the *Verde User Guide* for more information.

10.2 Using Verde Tasks to Manage Workflow

Task:
In the previous exercise you viewed the workflow engine from the e-product. Now we will look at managing workflows though the **Verde Tasks** module.

Suggested actions:
1. Go to the **Verde Tasks** module (using the link on the upper left menu).
2. Here you can see several different views of the current Verde workflow tasks:
   - ✓ All open tasks
   - ✓ My tasks
   - ✓ Etc.
3. Select the accept link to assign a task to yourself.
4. Refer to Section 2.15 – **Workflow** – in the *Verde User Guide* for more information.

11 KB Tools

11.1 KB Tools – Reports

<u>Task</u>:
Your library director has asked for a report of all e-resources that are in the process of being evaluated.

These e-resources would have a **Selection Status** of *Evaluation* in Verde.

Use the appropriate report in the **KB Tools** module to retrieve this information.

<u>Suggested actions</u>:

1. Go to the **KB Tools** module.

2. Select the **Report** tool and then **Report e-Products by Selection Status**.

3. Set the appropriate parameters in the report – **Selection Status**=*Evaluation*, and any other parameters you wish.

4. Run the report.

5. Use the **View Report output** tool to see the results.

6. Refer to Section 5.2 – **KB Tools: Reports** – in the *Verde User Guide* for more information.

11.2 KB Tools – Scheduling

Task:
You want to set up a recurring task to process your subscription renewals.

- ✓ Use the appropriate task in the KB Tools module to accomplish this.
- ✓ Use the Verde Job Scheduler to view the jobs (tasks, reports and loaders) that have been set up to run on a schedule in your Verde system.

Suggested actions:

1. Go to the **KB Tools** module.
2. Select the **Task** tool and then **Subscription Renewal**.
3. Set the appropriate parameters in the task.
   - ✓ Pay special attention to the Update database option.
   - ✓ Consider the effects of updating the database versus running the task without updating the database.
4. Schedule the task to run at a monthly interval.
5. The results will be viewable using the **View Task output** tool after the task has run.
6. To see all jobs that have been scheduled, select the **View Scheduled Tasks** option from the tools menu.
7. Display scheduled jobs based on the creator.
   - ✓ Jobs may be opened for editing or deleted from this screen, depending on your user permissions.
8. Refer to Section 5.4 – **KB Tools: Tasks** – in the *Verde User Guide* for more information.

12 Verde Admin Module

12.1 Create New Verde Users

Task:
A new librarian has just joined the electronic resources department in your library and needs a Verde username and password. It is the library's policy that in the first two weeks on the job, the new librarian should have read-only privileges to library systems including Verde.

Two additional library staff, the licensing expert, and the acquisitions manager need to gain access to Verde for the first time.

- ✓ Create these new Verde users, assigning the appropriate roles and permissions to each user.
- ✓ For the sake of this exercise, use your name for each of the users. For example:
  - ✓ [Your Name]-ro (read-only user)
  - ✓ [Your Name]-lic (licensing expert)
  - ✓ [Your Name]-acq (acquisitions manager)

Suggested actions:

1. Since you are a Verde Administrator, you have access to the Verde **Admin** module. Access this module through the **Admin** link in the top menu bar.
2. From the Users tab, press the **Add** icon to create a new user.
   - ✓ Enter the user's login name as described above.
   - ✓ Remember the user's password as it will not be visible once it is entered.
   - ✓ Enter the user's full name (example: Joe Smith-ACQ)
   - ✓ Enter your actual email address to receive alerts from Verde later in the training.
   - ✓ Indicate that this user is not a Verde system administrator.
   - ✓ Select Verde roles for your user that seem appropriate. These roles will function to trigger emailed workflow tasks alerts.
   - ✓ Submit the new user record.
3. Navigate to the Privileges tab, and add the appropriate permissions for this user.

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- ✓ Take time to evaluate each user permission and consider the relevance to this user type.

4. Repeat this exercise for the other two users described above.

5. Log out and login as the new users, one at a time.

6. Observe which options are available to each user in the system.

   - ✓ Note that the Admin module is no longer available to non-administrator users.

   - ✓ Note that the read-only user cannot edit the system.

7. Refer to Sections 3.1.2 and 3.1.4 – **Admin Module: Users: Creating a New User** and **Admin Module: Users: Roles** – in the *Verde User Guide* for more information.

12.2 Create New Verde User Profiles

Task:
Now that you have learned how to create users and assign roles and permissions to those users, we will learn how to create **Profiles**. Profiles are pre-defined sets of permissions, grouped together to make the user permission granting process more efficient.

- ✓ Create a new Verde user profile.

Suggested actions:

1. From the **Admin** module, select the **Profiles** tab and press the **Add** icon to create a new profile.
   - ✓ Decide on a specific type of user for which you will create a profile, for example Acquisitions clerk.
   - ✓ Enter the profile name and optional description.
   - ✓ Submit the new profile record.
2. Navigate to the Permissions tab, and add the appropriate permissions for this user.
   - ✓ Take time to evaluate each user permission and consider the relevance to this user type.
3. Return to the list of all users by selecting the **Admin** module from the top menu and clicking the **Users** tab.
4. Create a new user, and rather than adding individual permissions individually, simply add your newly created profile to this user.
   - ✓ Navigate to the Permissions tab and observe that the permissions assigned to the profile are now assigned to this user.
5. Refer to Sections 3.1.2 and 3.1.3 – **Admin Module: Creating a New User** and **Admin Module: Profiles** – in the *Verde User Guide* for more information.

12.3 Code Tables

Task:
In your library you have the following workflow for implementing e-resources:

Trial
if approved…
Cataloging
Internal Training
Public Announcement
Production
Withdrawn

Customize Verde to reflect your local workflow terms.

Suggested actions:

1. Go to the **Admin** Module.

   ✓ Note that you must have *Administrator* privileges in Verde to access this module.

2. Go to the **Code Tables** tab and search for the appropriate table.

3. In this case select the **Topic** *E-Product* and the **Field** *E-Product status*.

4. Change the **Implementation 1, 2, 3** labels to reflect your local implementation terms.

5. Observe the effect of these changes in the **KB Manager**.

6. Refer to Section 3.4 – **Admin Module: Code Tables** – in the *Verde User Guide* for more information.

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12.4 Defaults

Task:
In your library you always negotiate licenses to include a fair use clause indicator, and you store all electronic copies of licenses on your local file server.

- ✓ Customize Verde to reflect these license details by default for all newly created licenses.

Suggested actions:

1. Go to the **Admin** Module.

   - ✓ Note that you must have *Administrator* privileges in Verde to access this module.

2. Go to the **Default Values** tab and the license area.

3. Record the specified information, and any other information you wish in the license description and terms.

4. Observe the effect of these changes in the **KB Manager**.

5. Refer to Section 3.5 – **Admin Module: Default Values** – in the *Verde User Guide* for more information.