





Streamlining acquisitions and e-resource management with Alma

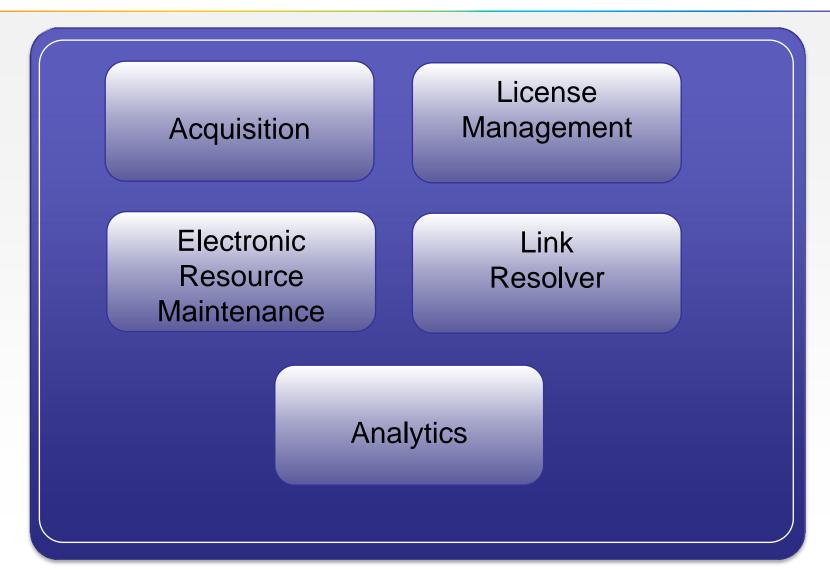
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Ex Libris Services





ERM in Alma



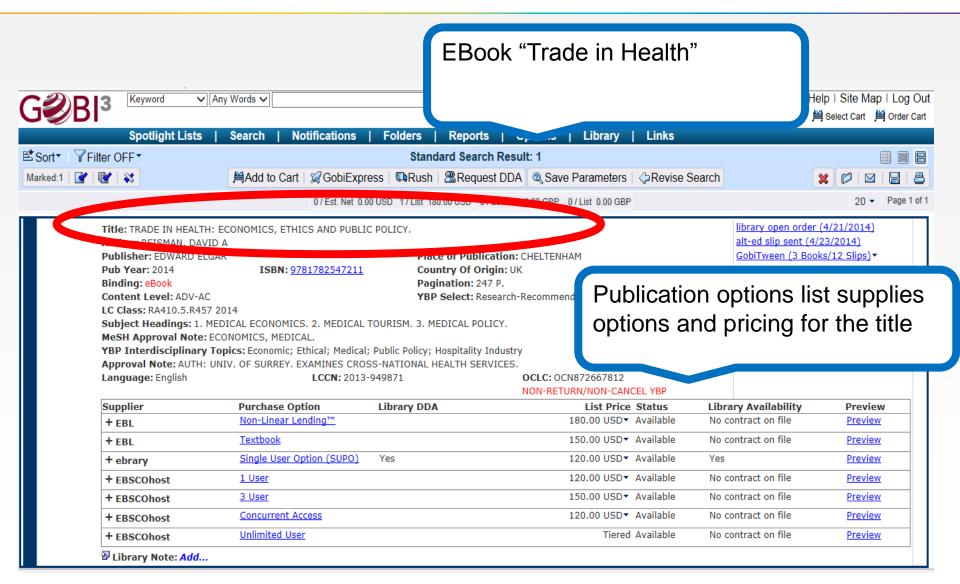


ERM in Alma

- Purchasing electronic resources
 - Fund allocation and expenditures
 - Invoicing
- Various purchasing workflows
 - Embedded order data
 - PDA/DDA Program
 - Manual creation of orders
 - Real time integration with selection platforms



eBook Order: GOBI Bib



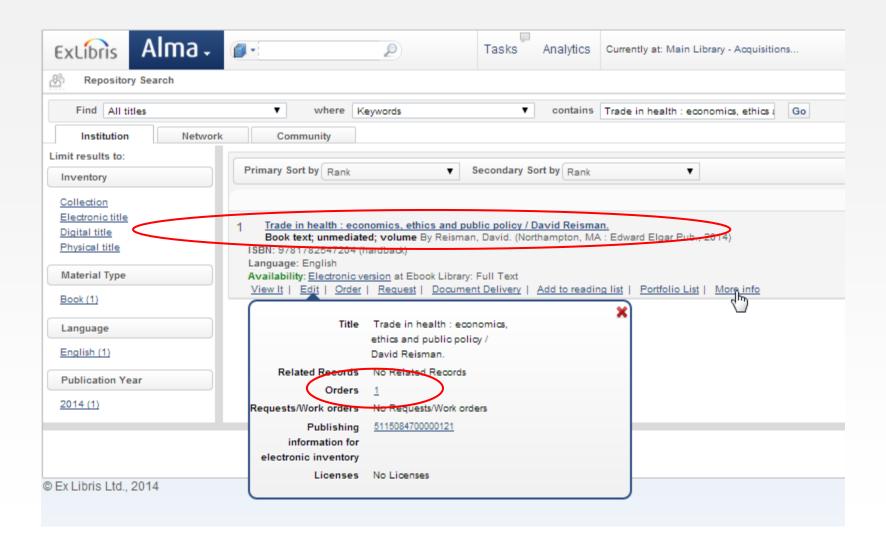


eBook Order: GOBI Order Screen

GobiExpress Order	1 item. ⊠
Title: TRADE IN HEALTH: ECONOMICS, ETHICS AND PUBLIC POLICY. Author: REISMAN, DAVID A Publish Year: 2014 ISBN: 9781782547211	
Please Choose Template: or enter order details below.	
Subaccount* 1950-28 US BIO-MED E-ORDERS ✓ P.O. Number	□ No Substitutions Initials YBP
Fund code* TSMMEDO Instructions to YBP	Quantity 1 eBook Purchase Option* EBRARY - Single User Option (SUPO)
Library* TINTE ✓	List Action O Retain Marked Status on Items in List Remove Marked Status on Items in List
Location* GEN ✓	
Internal Order Note	
	Cancel ☑ Clear Order Details ❷ Order ➪

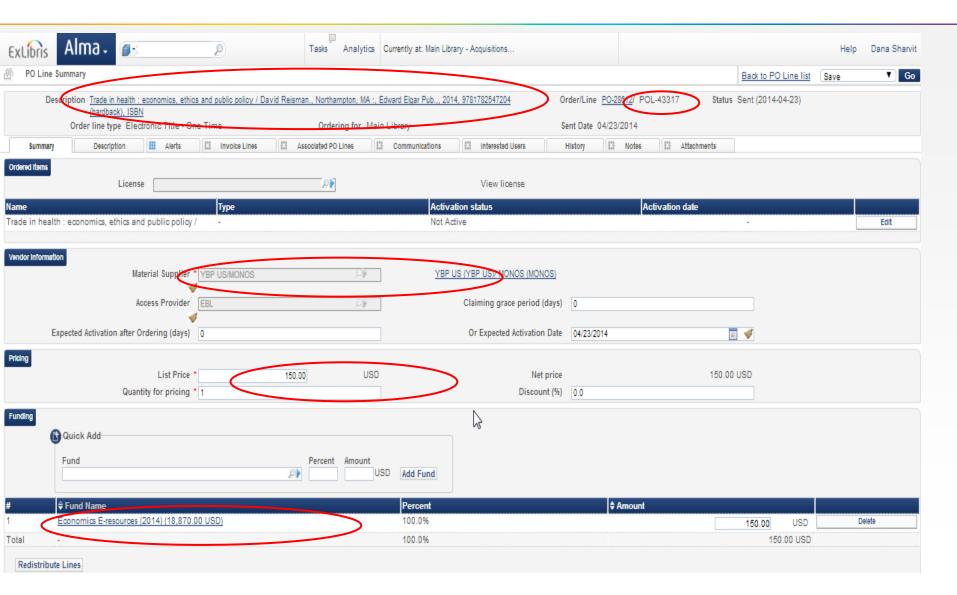


eBook Order: Alma Bib





eBook Order: Alma Order





The Alliance

- 37 academic libraries in WA-OR-ID
- Courier & Resource Sharing
- Electronic resources negotiation & licensing
- DDA Program
- Shared ILS



Why a Shared ILS?

- Strong record of collaboration
- Dissatisfication with current systems
- Staff & cost savings
- Transformation, not migration

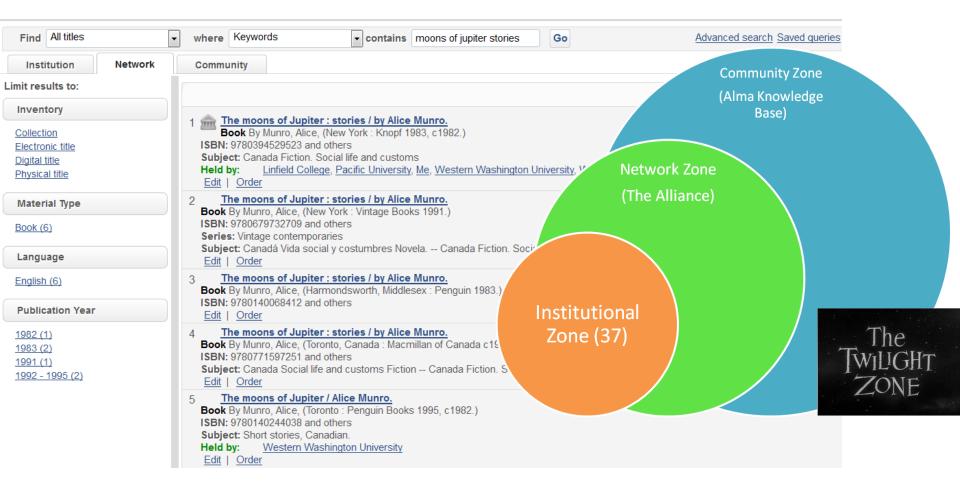


Cohort Model

- Multiple Cohorts
 - Cohort 1 (6 institutions) went live June, 2013
 - Cohort 2 (11 institutions) went live December, 2013
 - Cohort 3 (10 institutions) go live June, 2014
 - Cohort 4 (10 institutions) go live December, 2014
- Resource Sharing in Alma with Cohort 4



The Zones





ERM Linking

A discovery system uses three methods for providing online access:

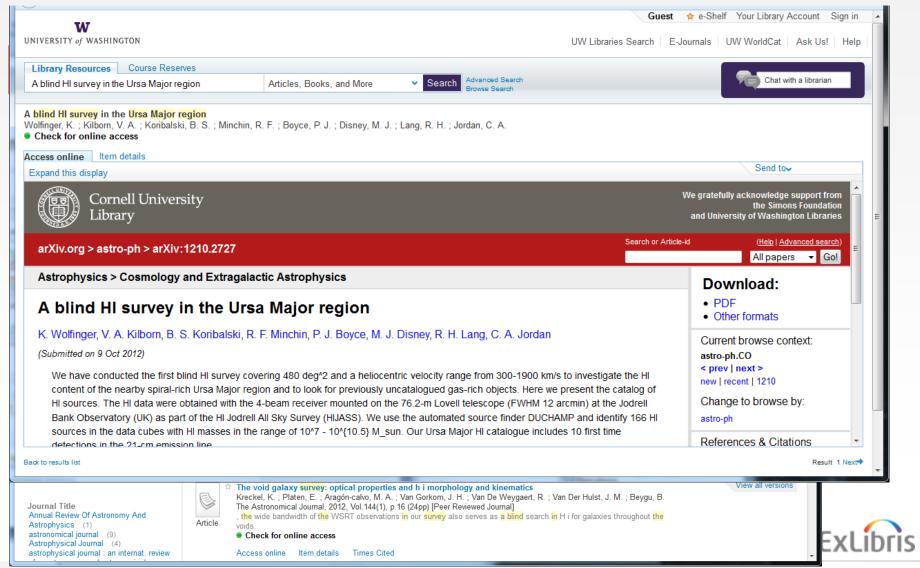
- Direct (Canonical) Linking
- OpenURL Link Resolution Using a Knowledge Base
- Linking from MARC Records

In an ideal system, all of these are managed within a single system and interface

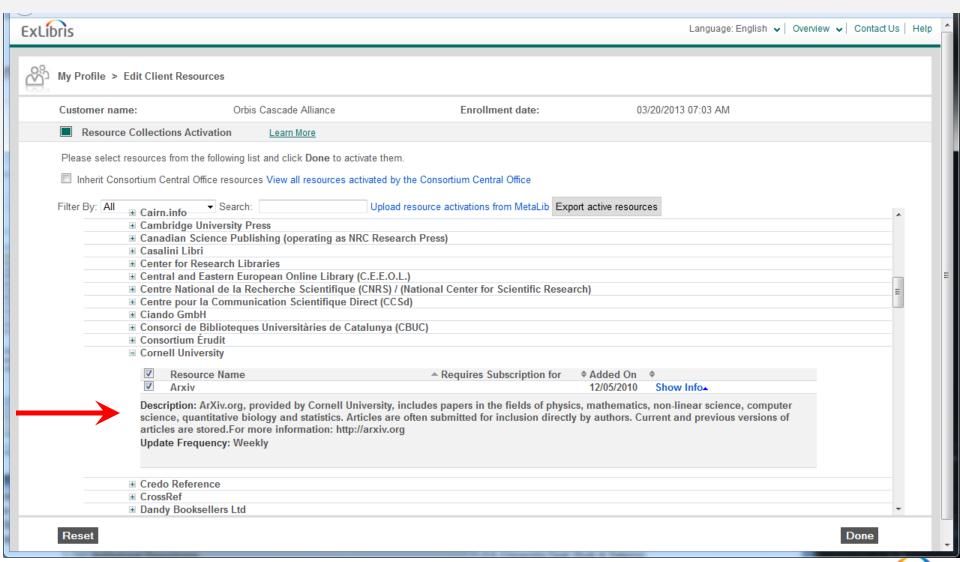


Direct Linking

Primo direct linking is managed within Primo Central



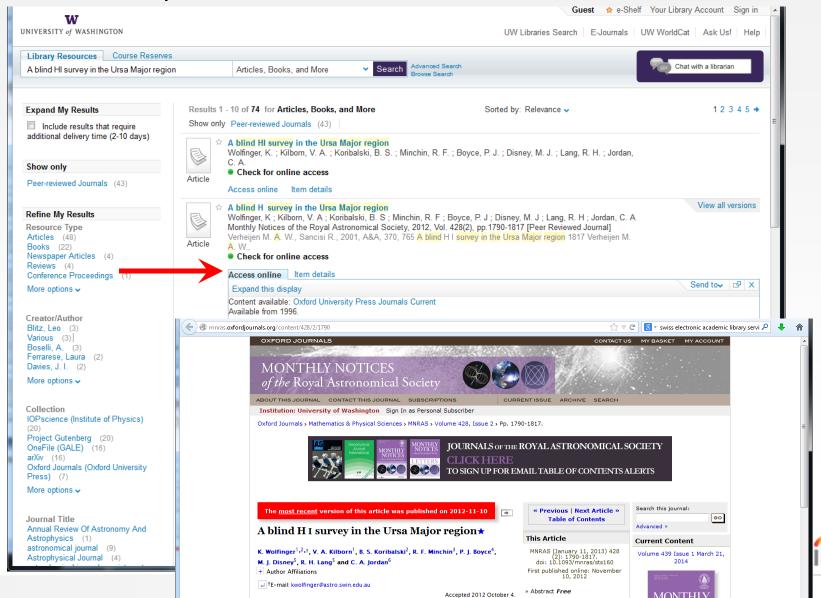
Managing Primo Central



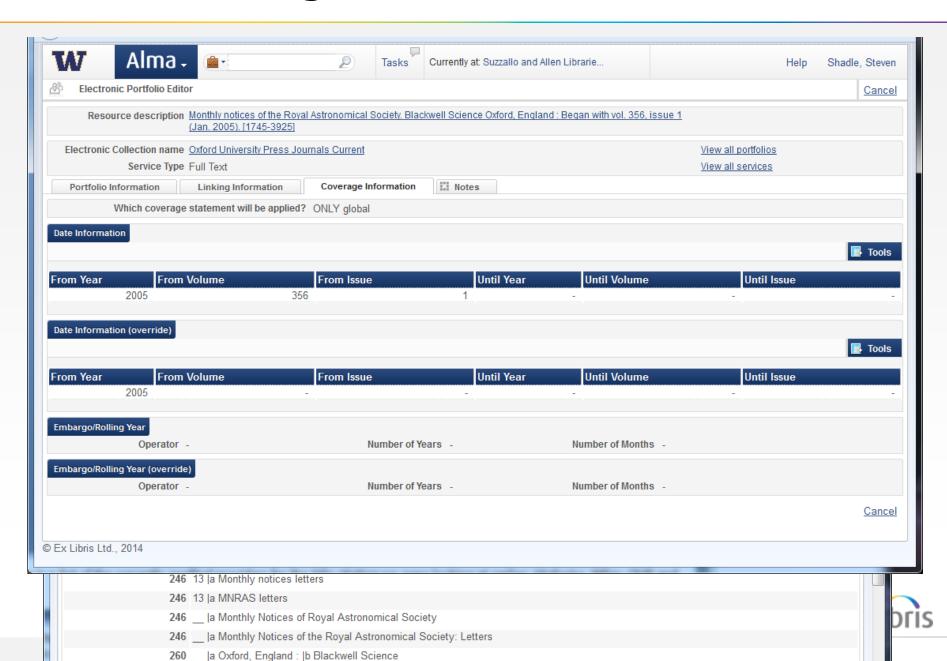


OpenURL Link Resolution

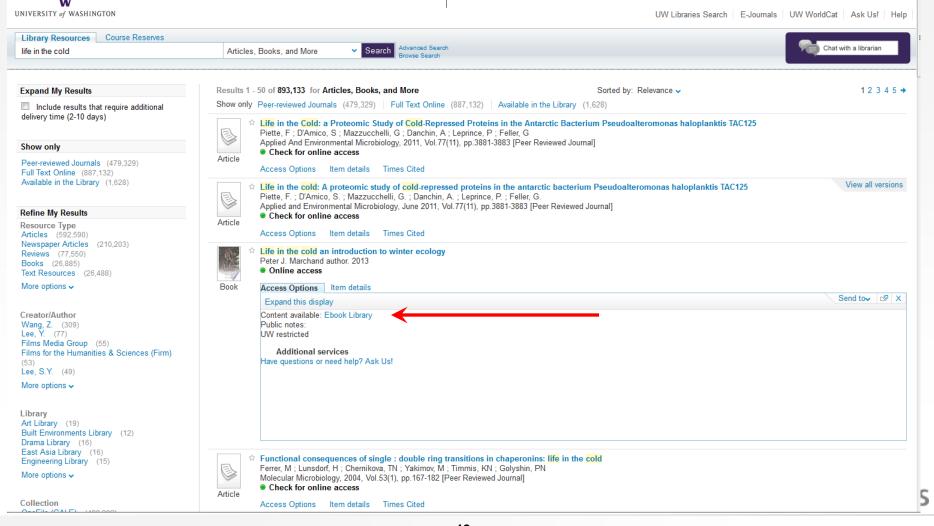
Primo sends OpenURL to Alma UResolver



Alma Knowledge Base

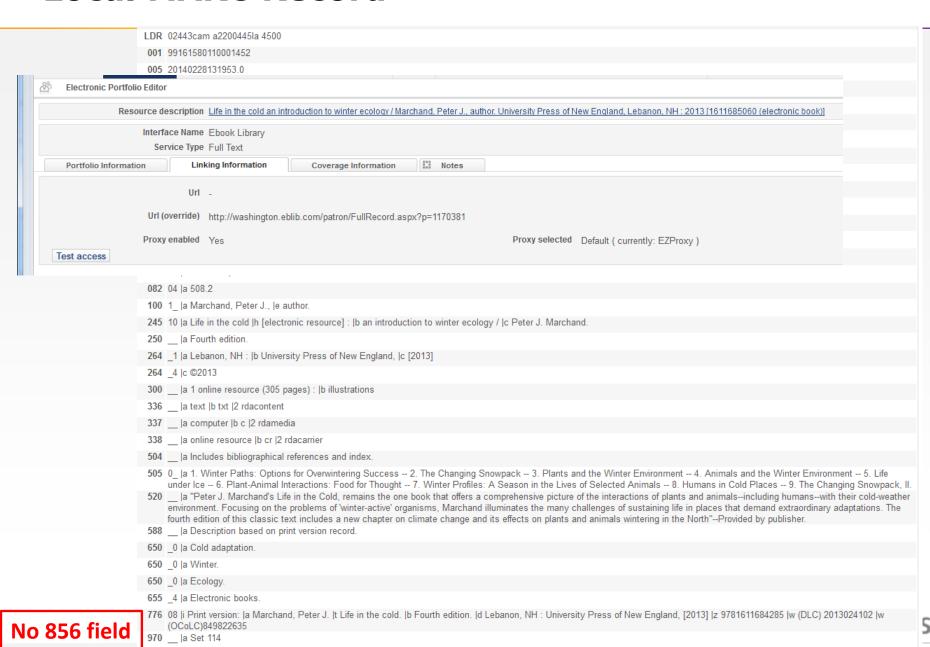


Linking from MARC Records

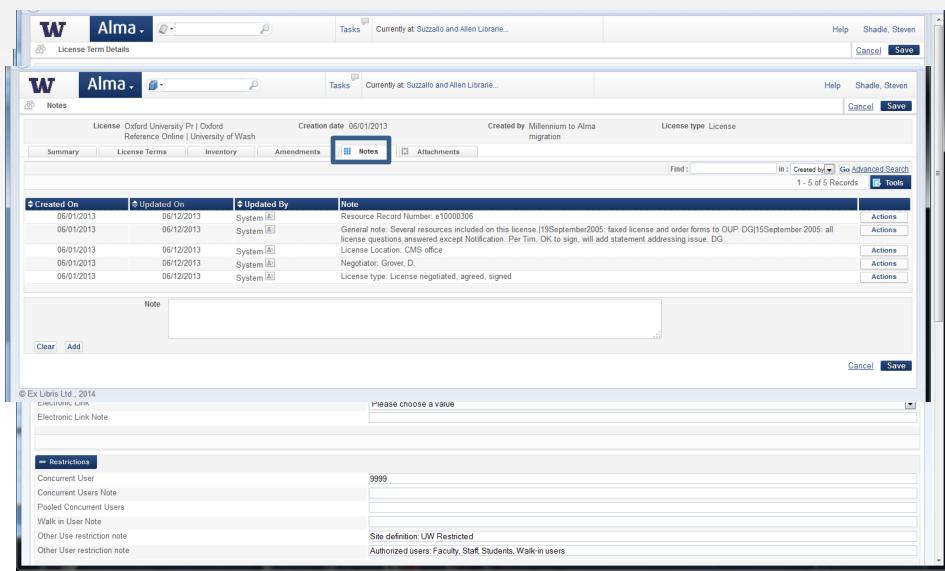


Local MARC Record

994 |a C0 |b WAU



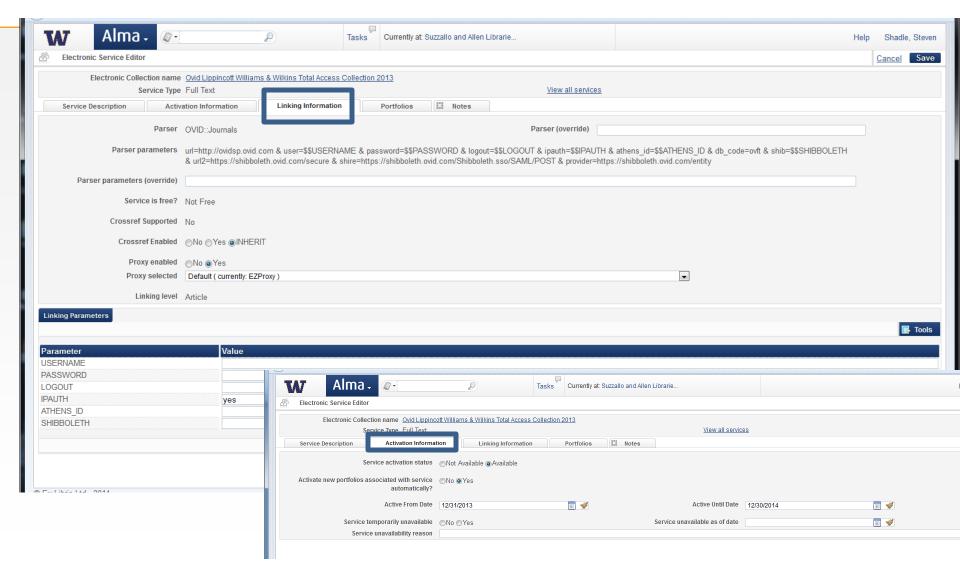
The "M" in ERM



License Management

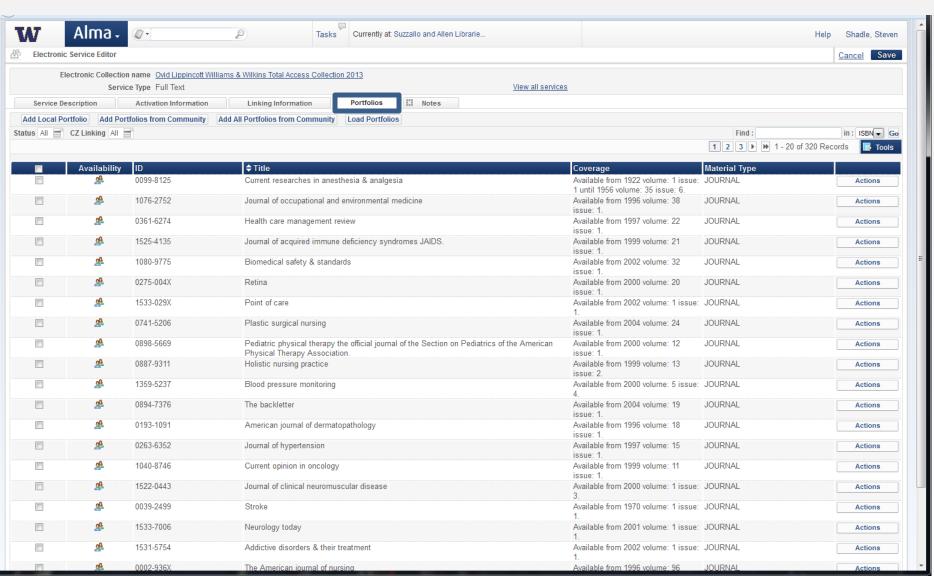


The "M" in ERM





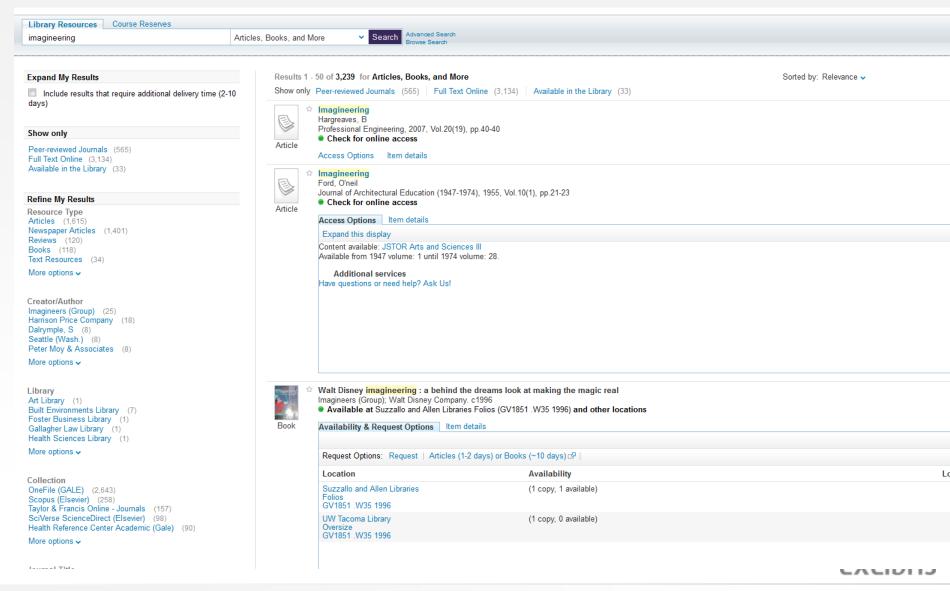
The "M" in ERM



Package Management



One Other Piece of Integration: UResolver



Challenges

- Best practices for and coordination of technical services operations
- Vendor integrations
- Training
- Complexity
- Tight schedule
- Creating policy before all cohorts are up and running



Post-Migration Wins

- Merging of silos
- Opportunities for varying levels of automation
- Further blending of acquisitions & cataloging
- Greater collaboration among Alliance members
- Obtaining e-book resources is much faster
- Batch record loads "just happen" once configured correctly



Strategic Opportunities for the Alliance

When all four cohorts live:

- Collaborative technical services
- No more hardware purchases/maintenance
- Streamlined operations across the alliance as a whole
- Much easier to manage consortial collection development and purchasing



Questions?

