Getting the Most from Alma

E-Resource Acquisitions and Activation

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Introduction

Alma's workflows support streamlining a variety of purchasing models for electronic journals and electronic books, including:

- Individual title subscriptions;
- Individual title purchases;
- Full package subscriptions; "Selective" (partial) package subscriptions; and
- Patron-driven acquisition of e-books.

The Alma Community Zone is populated with a Central KnowledgeBase (CKB) that tracks the most up-to-date vendor offerings in the shared data services environment. When acquiring a new package the staff user may search the CKB in the Community Zone; when the relevant e-resource is located an acquisition workflow can be initiated. Once the e-resource has been acquired, a workflow to activate the e-resource may be initiated.

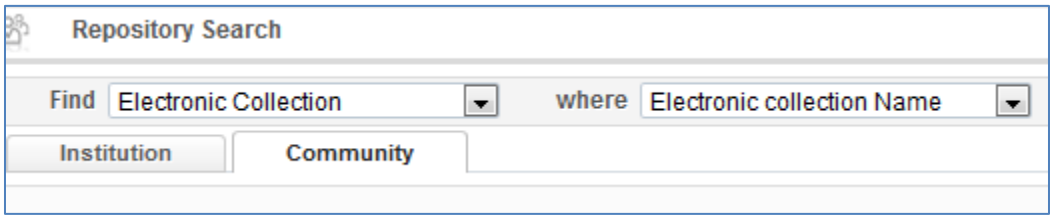
This document outlines a step by step workflow for ordering and activating an e-resource package.

The Acquisitions Workflow

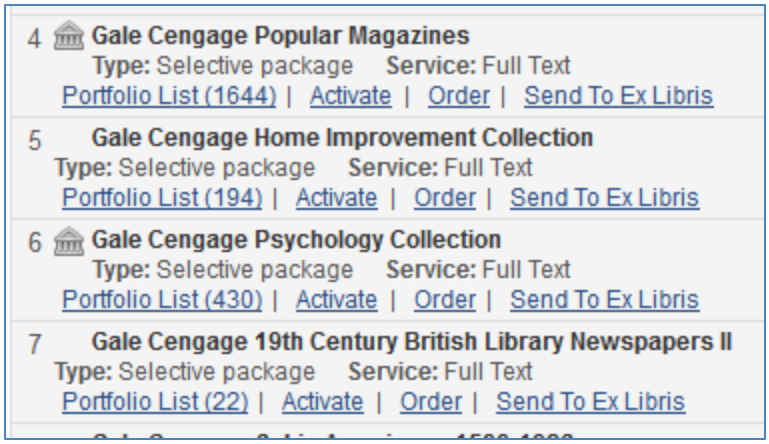
Searching the Community Zone

As mentioned above, the e-resource ac acquisition and activation workflow starts with a search in the Community Zone.

Utilizing the rich functionality of the Alma Repository Search, you may elect to set a pre-search filter and search only for Electronic Collections. Once this filter has been chosen, choose an appropriate index – e.g. Electronic collection Name

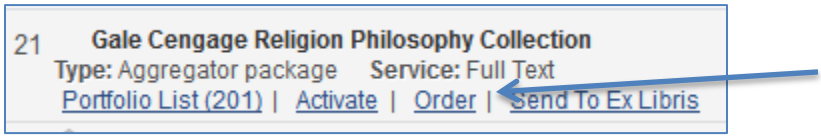


A list of results display. The institution icon next to a result is an indication that the e-resource has already been acquired and activated in the Institution Zone.



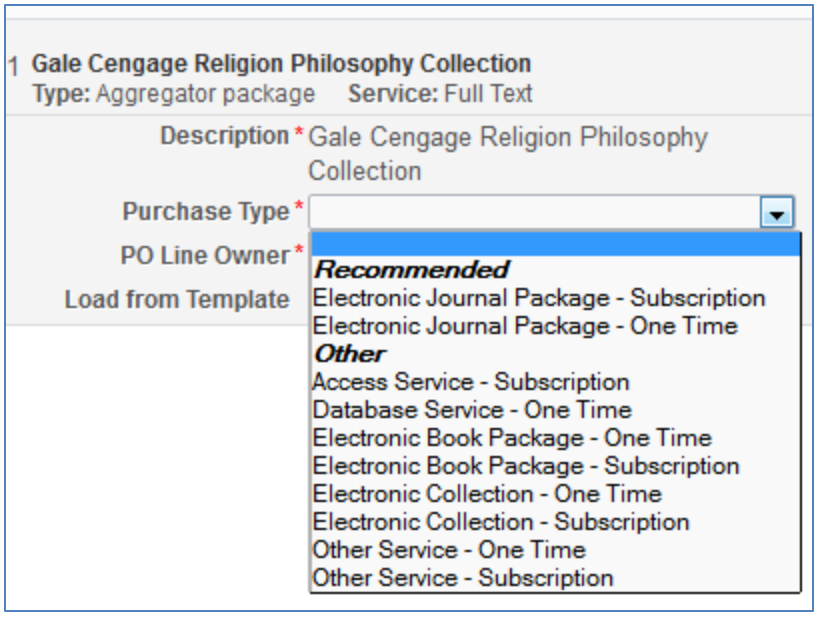
In addition, the results show the type of package (e.g. aggregator or selective), the services offered (Full Text, TOC, etc.), and the number of portfolios in the package.

In order to start the acquisitions process click on the **Order** hypertext link on the relevant package line.



Initiating the PO Line

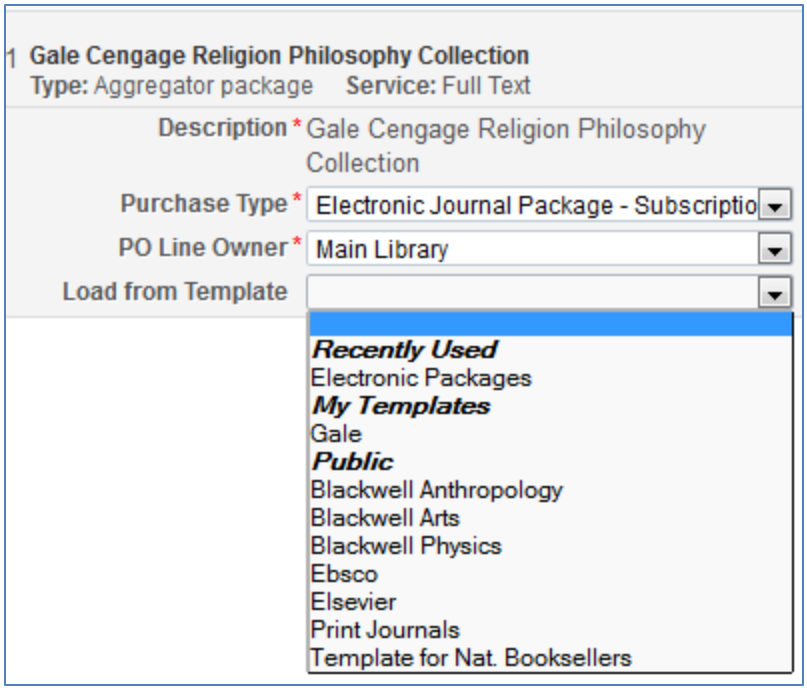
Clicking on **Order** will open a page in the Institution Zone for filling in the PO Line type and owner. The **Purchase type** drop-down list offers a selection of resource types with recommendations based on the type of material we selected.



Choose the relevant library for which you are ordering the e-resource from the **PO line owner** drop-down list.

Alma supports the option of creating PO Line templates. This is a great time saving option, as fields in the template can be populated (e.g. vendor, fund, purchase type), helping to streamline the workflow and avoid repetitive duplicate input. Note that templates can be private or shared.

Either choose one of the templates, or click on the **Create PO line** button to continue to the PO Line screen.

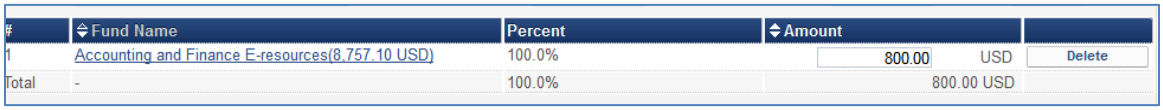


Creating the PO Line

On the **Summary** tab, fill in the relevant fields. Note the mandatory fields that must be filled in – e.g. Material Supplier, Fund, Renewal Date, etc.

Note the fields that are hypertext linked, allowing us to navigate to the relevant record (e.g. license, or fund), if necessary. Another example of Alma's efficient workflow engine, is that we can click on the hypertext link, review the record (e.g. fund), and then go back to the PO Line without loss of data or input.

Note too that we can see that status of the current balance of the fund. This will always be updated whenever we view the PO Line.

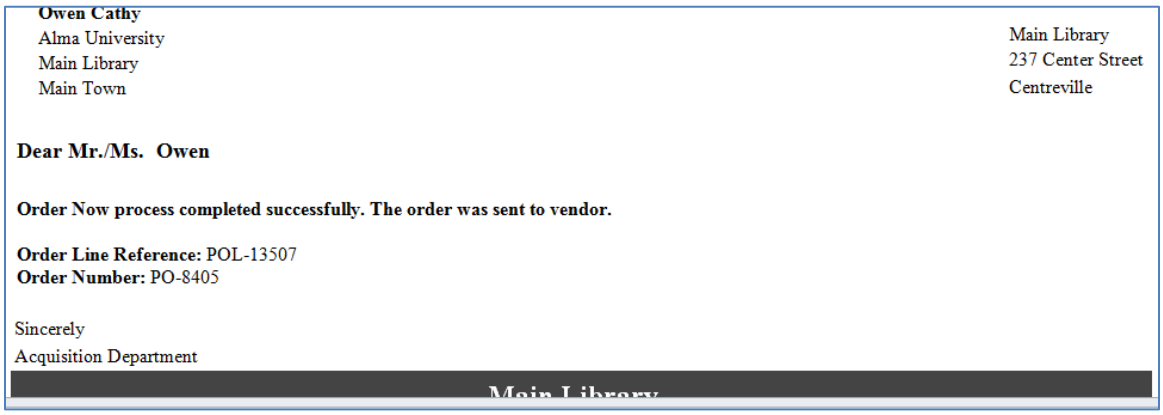


Be sure to fill in the **Expected Activation Date** – the date when we can activate the e–resource package.

Based on the workflows in your library, either click on **Save, Save and Continue**, or **Order Now**.

- Save will save the record with no further action
- Save and Continue will move the PO Line to the Purchase Order area
- Order Now will send the order to the vendor

If the **Order Now** option was chosen, you will get an email notification that the order was sent.



Owen Cathy
Alma University
Main Library
Main Town

Main Library
237 Center Street
Centreville

Dear Mr./Ms. Owen

Order Now process completed successfully. The order was sent to vendor.

Order Line Reference: POL-13507
Order Number: PO-8405

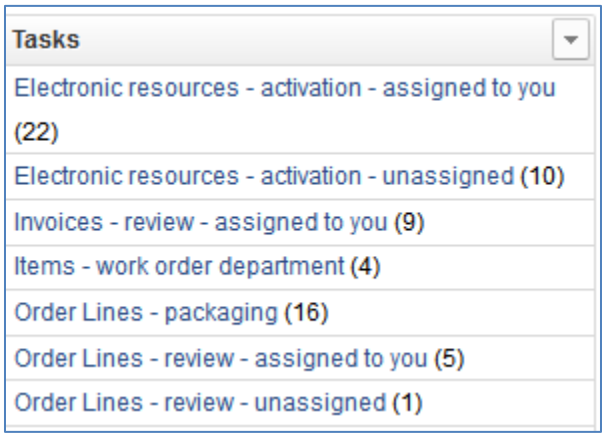
Sincerely
Acquisition Department

Main Library

Activating the E-Resource

The Task List

Once the order has been sent to the vendor, and is ready for activation, it will appear in the task list under the hypertext link **Electronic resources – activation – unassigned** (related to a user's roles). This is a good example Alma's efficient workflow options. The staff user can immediately see in the Alma task list the items that need to be taken care of.



Tasks

Electronic resources - activation - assigned to you (22)
Electronic resources - activation - unassigned (10)
Invoices - review - assigned to you (9)
Items - work order department (4)
Order Lines - packaging (16)
Order Lines - review - assigned to you (5)
Order Lines - review - unassigned (1)

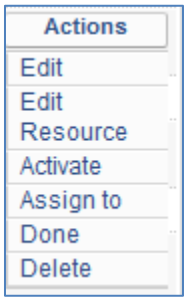
Why is this task not automatically assigned to the staff user that created the order? The assumption is that the acquisitions staff member might not be the person activating the e-

resource. As soon as a staff member 'picks up' the task, it will automatically move from **unassigned** to **assigned**.

Click on the hypertext link in order to navigate to the **Electronic Resource Activation Task List**.

We will find our e-resource in the **unassigned** tab. Note the various options for defining the status of a package – e.g. check access; access confirmed; not yet online.

From the **Actions** button, click on the **Activate** link, in order to navigate to the first screen of the activation wizard



The E-Resource Activation Wizard

Screen 1

On the first screen of the activation wizard enter relevant information – e.g.

- Activate this package service
- Activate from date
- Automatically activate new portfolios
- Access Rights

Access rights are defined in the Fulfillment Configuration Menu -> Digital Fulfillment -> Access Rights

Click **Next** to continue to screen 2 of the wizard

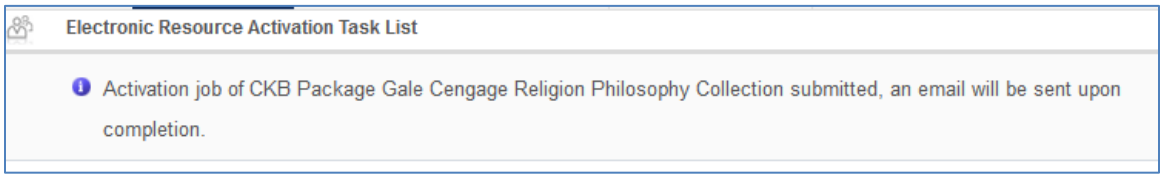
Screen 2

On the **Select Activation method**, note the options to activate all portfolios; activate selected, and activate manually. For this workflow example, choose the default - **Activate All**.

Screen 3

On the last screen of the wizard click **Activate**.

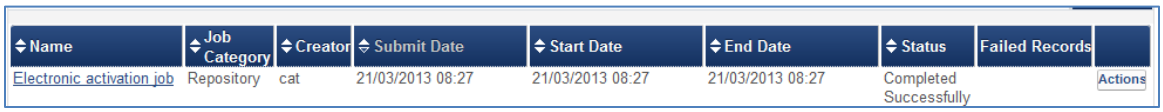
We are taken back to the **Electronic Resource Activation Task List** where a message displays that the activation job has been submitted. Note the option for the staff user to receive an email on the completion of the activation task.



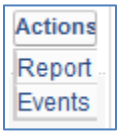
The Activation Job

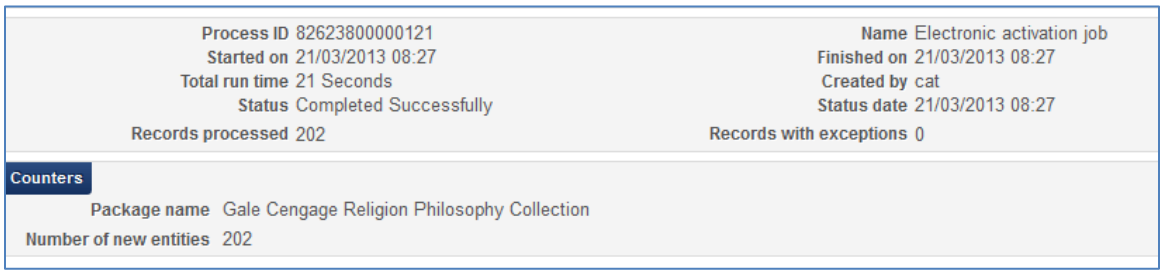
Details of the activation job can be seen in the **Monitor Processes** screen (Resource Management -> Processes -> Monitor Processes).

If the activation process is still running, we will see the parameters of the process in the **Running** tab. Alternately, navigate to the **Completed** tab to see summary information about the activation job.

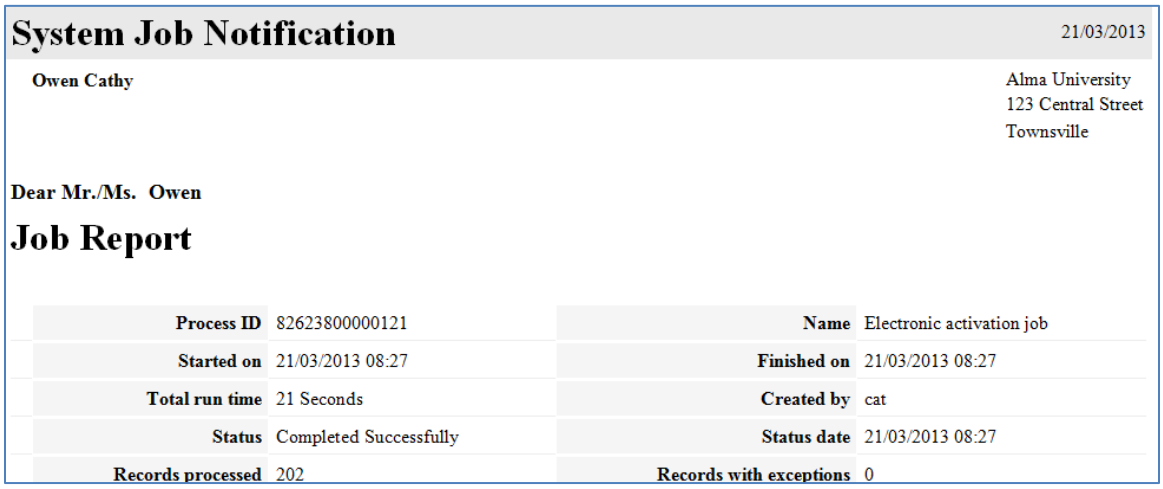


From the **Actions** button, click on **Report**, to see details of the activation job:





The same information will display in the email sent to the staff user:



System Job Notification 21/03/2013

Owen Cathy

Alma University
123 Central Street
Townsville

Dear Mr./Ms. Owen

Job Report

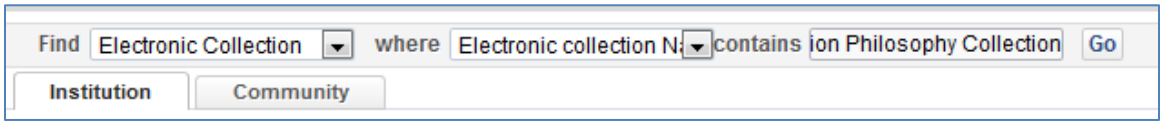
Process ID	82623800000121	**Name**	Electronic activation job
Started on	21/03/2013 08:27	**Finished on**	21/03/2013 08:27
Total run time	21 Seconds	**Created by**	cat
Status	Completed Successfully	**Status date**	21/03/2013 08:27
Records processed	202	**Records with exceptions**	0

Both the report and the email are very useful tools for checking to see that the activation was completed in full.

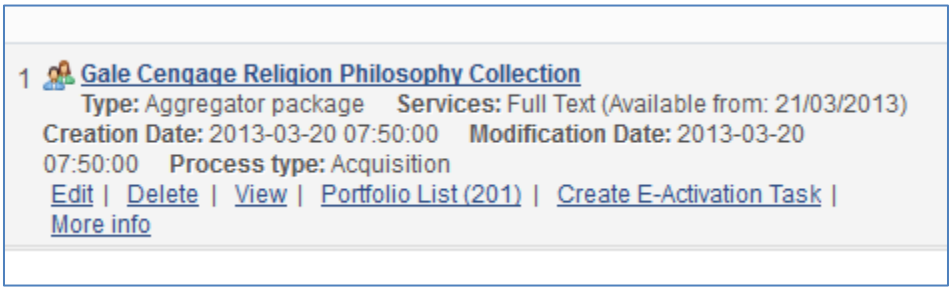
Note that not only are all the journal titles (and the e-resource package) being activated, they are also being indexed in the Institution Zone.

Searching for the Activated E-Resource

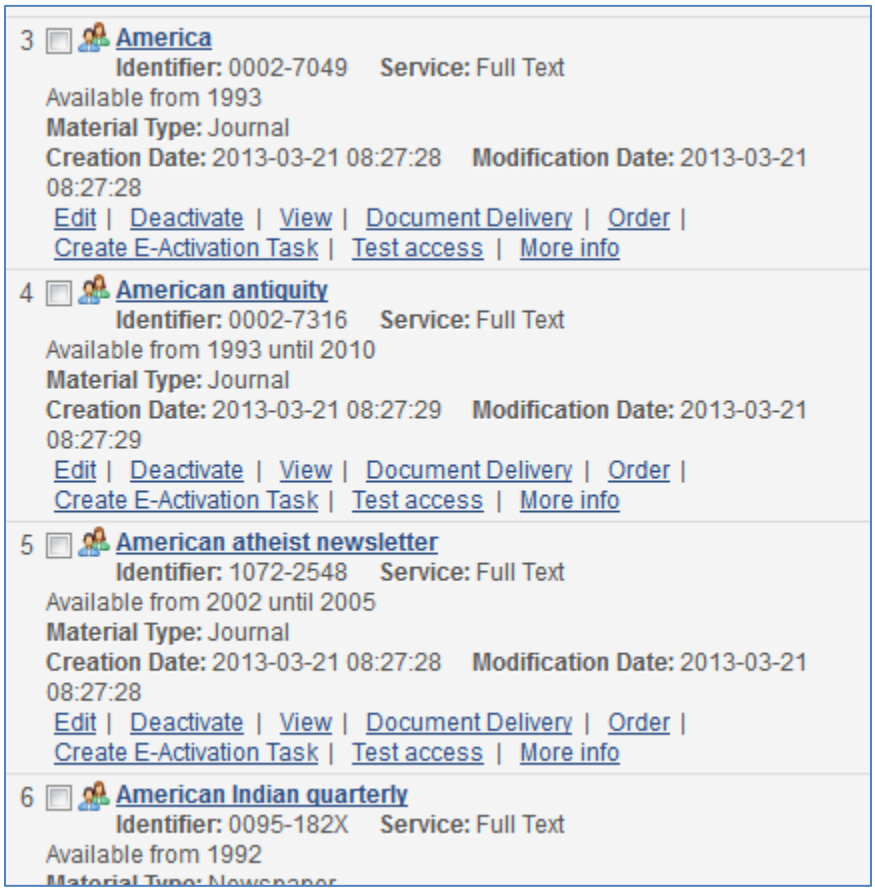
From the Repository search, search for Electronic packages – Electronic Collection Name – the package name you just activated.



Summary information of the package displays, with the Community Zone icon next to the name indicating that this package originated in the Community Zone but has been acquired and activated in the Institution Zone.



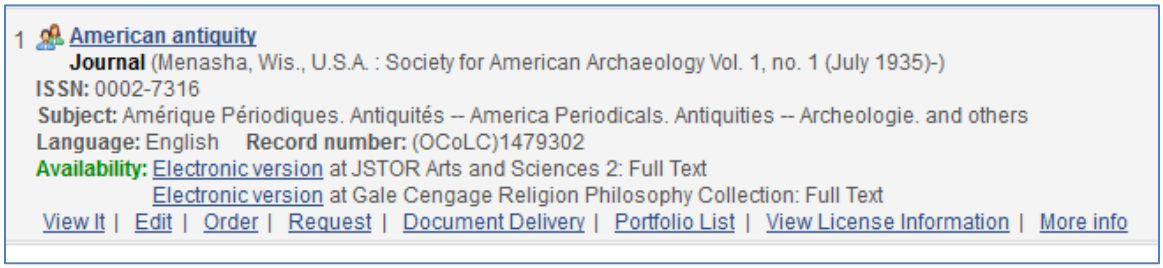
Click on the portfolio list hypertext link to see the titles of the journal titles in the package.



Note the title of one of the journals.

From the **Quick Search** box at the top of the screen, search for this journal title

Summary information of the journal title displays, together with the Community Zone icon



Click **View It** to navigate to the UResolver screen to view the full text of the journal title.

Summary

We've seen a simple and powerful workflow for ordering and activating an e-resource. Starting with the tools provided by Alma for searching and ordering an e-resource in the Community Zone, progressing to the acquisitions workflow, and lastly activating the e-resource in Alma (and its subsequent publishing to Primo). Alma's rich workflow functionality cuts out superfluous steps, and helps streamline the work and the efficiency of the staff user.