Managing Electronic Resources – The Basics

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ExLibris Alma

ExLibris a ProQuest Company

Welcome and Introductions

- Melanie Fitter
  - Qualified Librarian
  - Professional Services Director, APAC
  - Product Knowledge
    - Advanced Alma
    - Basic Primo
    - Basic Leganto
  - Ex Libris for 18 years

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Session Overview

Description

Efficient management of Electronic Resources in Alma provides great benefits to Library staff and end users alike. This session will expose attendees to management of electronic resources and best practices in general.

Objectives

By the end of this session, you will know how to:

- Find Electronic Resources in the Community Zone
- Order Electronic Resources
- Activate Electronic Resources

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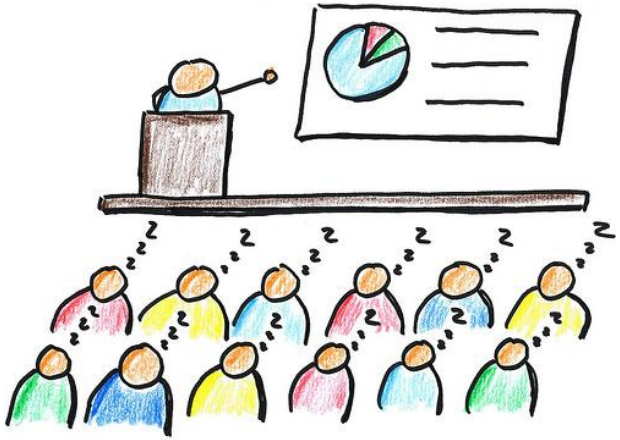
Audience for this session

- New Alma users
- Electronic services librarians
- Acquisitions staff



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- Overview and Background
- Ordering E-resources
- Activating E-resources
- Next Steps

short break

Overview and Background

1. Terminology and e-resource levels
2. General workflow
3. User roles
4. Inventory Model
5. Advanced Search
6. Community Zone

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Terms

Electronic Collections can be:

- Aggregator Packages
- Selective Packages
- Databases

Portfolio: serial or monograph title

- Can be *standalone* or part of a package

Service: The connection/linking information (full-text or selected full-text) that is offered by a package

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Electronic Resource Levels

Electronic Collection	**ProQuest Biological Science Journals**
Service	**Full Text**
Portfolio List	**1,471 e-journals**
Portfolio Title	***Biomedical Journal*** **ISSN 2320-2890** Date Coverage: 2013-

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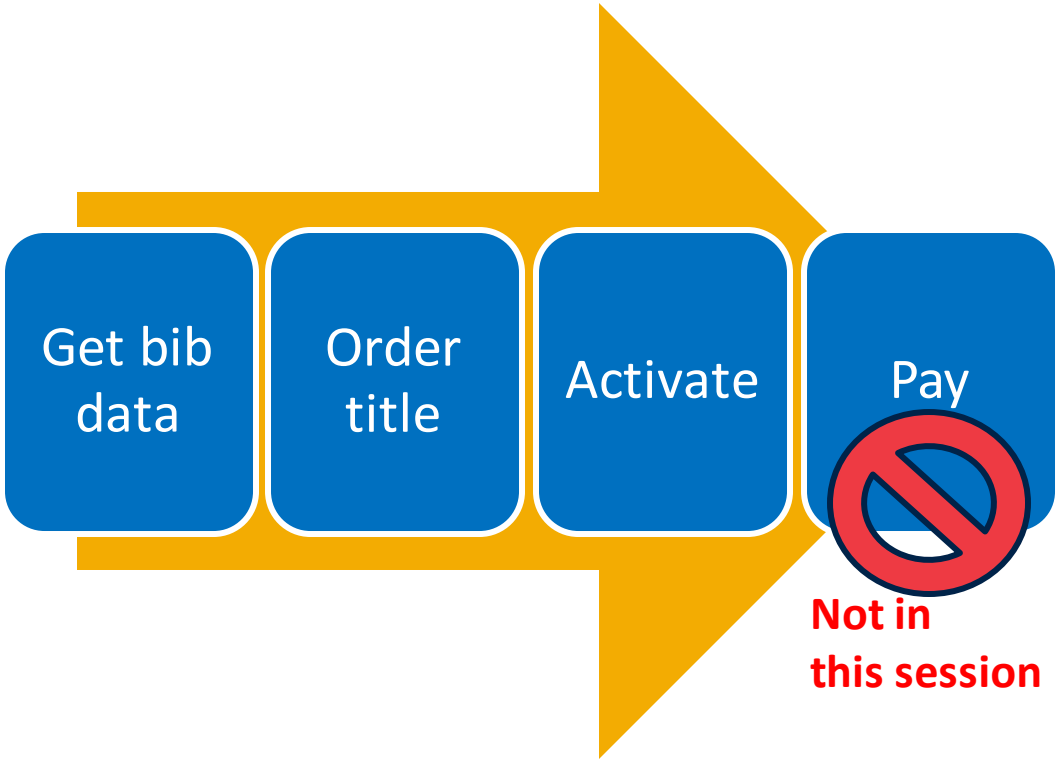
Ordering Workflow



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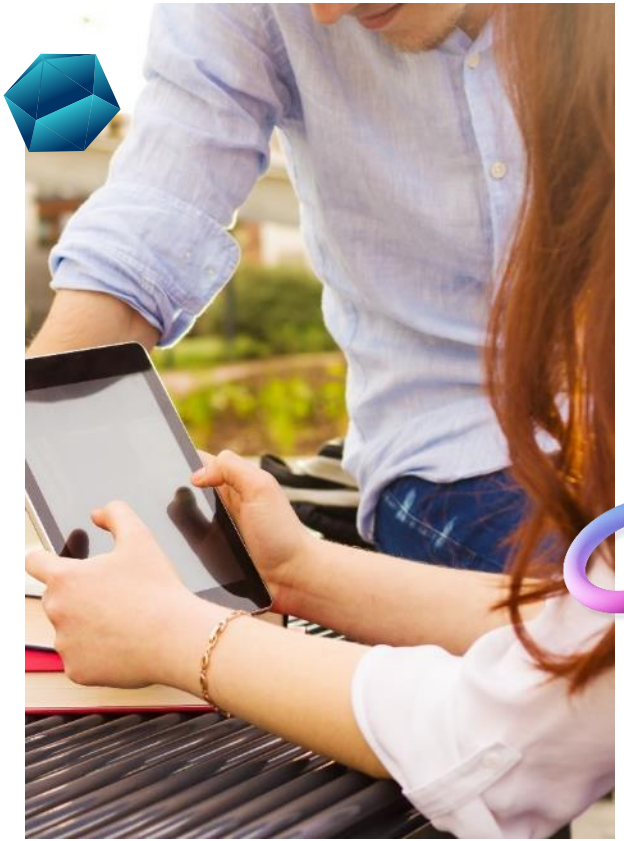
User Roles for E-Resources Management

- Purchasing Operator *
- Electronic Inventory Operator *
- Repository Manager *
- Trial Manager or Trial Operator
- Invoice Operator

* Roles for this session's workflows



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Overview and Background

1. Terminology and e-resource levels
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Electronic Resources – from multiple packages

Canadian social trends

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Power of Advanced Search

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

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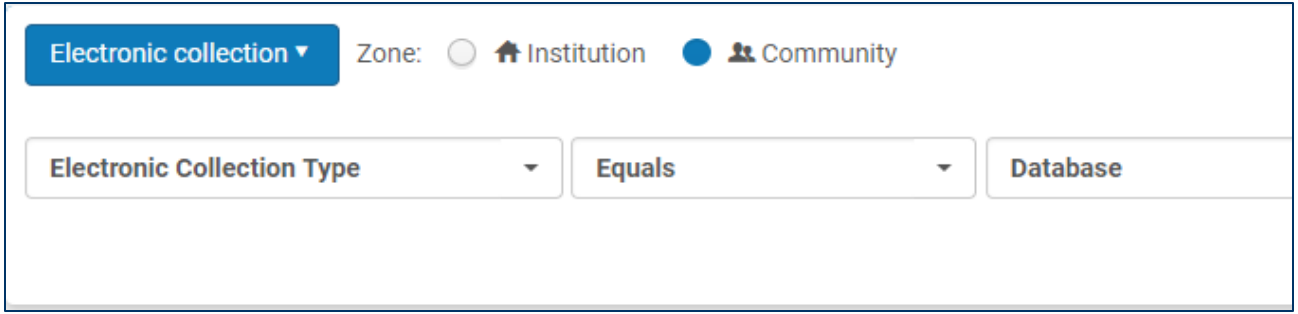
Using Advanced Search

Find local database collections:

Search Zone* for Electronic Collection, where:
Electronic Collection Type – Equals – Database



- Community Zone = Available for all institutions
- Institution Zone = Your institution's "catalog" and subscriptions

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Find the Linking Level

Search Institution Zone for Electronic Collection, where:

- Free – Equals – Not Free/Free

AND

- Linking Level – Equals – [pick your favorite]

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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.

- Goal of the CZ: Save librarians' time with acquisitions tasks, updating records, and authority control.

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

- Updated weekly by Ex Libris metadata librarians

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Contributing to the Community Zone

- Your Alma must be in Production
- Update CZ bib records copied into your IZ
- 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
- See Knowledge Center for details and SLAs

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- Overview and Background
- Ordering E-resources
- Activating E-resources
- Next Steps

Ordering E-Resources

1. General Workflow
2. Order Resource from CZ

   (demo and hands-on)
3. Create Local Collection
4. Create Local Portfolio
5. Link Local Resource to CZ Resource

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Ordering – General Workflow

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

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Ordering E-Resources Workflow

Alma

Step 1

Locate e-resource collection in the Community Zone

Step 2

Click “Order”

Step 3

Define PO Line Owner & Type; Click “Create PO Line”

Step 4

Fill out PO Line details

Step 5

Click “Order Now”

Step 6

Search your institution zone for the collection

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Order Collection from the Community Zone

- See Handout #1

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Order a Portfolio from the Community Zone

- See Handout #2

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Ordering E-Resources

1. General Workflow
2. Order Resource from CZ
3. Create Local Collection
4. Create Local Portfolio
5. Link Local Resource to CZ Resource

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Local Collections

Local electronic collections can be:

- Selective packages
- Aggregator packages
- Databases

Why create a local collection?

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

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Create Local Collection 1 - Portfolios

1. Menu: Add Local Electronic Collection
2. Collection Type: Selective (or Aggregator) package
3. Activation information
4. Service Description
5. Linking Information
6. Portfolios
7. “Save and Done.”

Demonstration

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Create Local Collection 2 - Database

1. Menu: Add Local Electronic Collection
2. Collection Type: Database
3. Additional Information

   Level URL
4. "Save"
5. Search repository for collection.
6. If you need a PO (for tracking expenses): "Order."

Demonstration

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Ordering E-Resources

1. General Workflow
2. Order Resource from CZ (demo and hands-on)
3. Create Local Collection
4. Create Local Portfolio
5. Link Local Resource to CZ Resource

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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 from provider

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Create Local Standalone Portfolio

1. Menu: Add Local Portfolio
2. Portfolio Type: Standalone
3. Activation information
4. Service Description
5. Linking Information
6. Portfolios
7. “Save and Done.”

Demonstration

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Create Local Standalone Portfolio

- See Handout #3

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Attach a 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

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Ordering E-Resources

1. General Workflow
2. Order Resource from CZ (demo and hands-on)
3. Create Local Collection
4. Create Local Portfolio
5. Link Local Resource to CZ Resource

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Link a Local Resource to a Community Zone resource

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

- CZ finally has the record; or
- CZ metadata is good now

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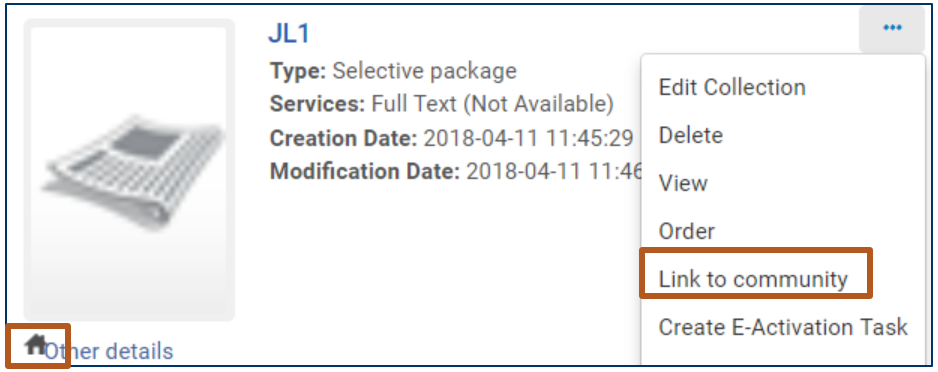
Link Local Collection to Community Zone

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

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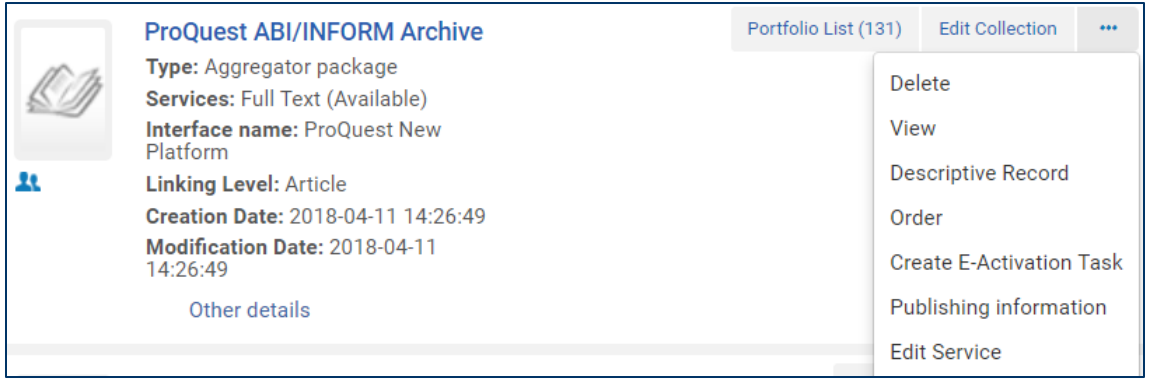
Unlink Collection from Community Zone

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



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

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- Overview and Background
- Ordering E-resources
- [illegible]ps
- Next Steps

Break time!
(5 min.)

Activating E-Resources

1. General Workflow
2. Activation
3. Test Access
4. Finalize Activation
5. Demo: Activate CZ Collection
6. Hands-On Activate CZ (if time permits)

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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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Activating an Electronic Collection

- Tasks > Electronic Resources - Activation
  - Or: Resources menu: Manage Electronic Resource Activation
- Row-Item Action: Activate
  - CZ-linked resource: Activation Wizard
  - Local Resource: Immediately activates, but allows edits

Demonstration

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Testing Access

- Find resource that needs access tested (search)
- Find collection via e-activation task list
- Row-Item Action: Test Access
  - If action not available, Create E-Activation Task
  - Test title access: View It

Demonstration

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Finalize Activation

- Suppress or Unsuppress Bib Record
- Confirm Services are active
- Row-Action Item: Done

Demonstration

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Activating E-Resources

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Activate and Test a Community Zone Collection

- See Handout #4

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- Overview and Background
- Ordering E-resources
- Activating E-resources
- Wrap-Up

Resources

- Documentation in the CKC:
  - Managing Electronic Resources
  - Electronic Resources – Scenarios and Workflows

- Additional support resources from Ex Libris:
  - Idea Exchange – ideas.exlibrisgroup.com
  - Developer Network – developers.exlibrisgroup.com
  - 2019 Knowledge Days Seminar Presentations
    - (Cross-Product section in CKC)

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