Electronic Resources Management – Advanced Topics

Megan Drake

ExLibris
a ProQuest Company

Welcome and Introductions

- Megan Drake
  - MLS, 2005
  - Four years at Ex Libris
    - Consulting Services Manager in North America
    - Expert Services, Special Projects, Functional Workshops
    - Previously Senior Implementation Consultant
      - Alma & Primo
      - Consortial Implementations
  - Systems & Applications Librarian at Pacific University
    - Orbis Cascade Alliance member
    - Heavily involved in SILS Project
    - Pacific first to go live in first cohort

© 2019 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

Session Overview

Description

Learn advanced tools and tactics for managing electronic resources in Alma. This session will cover topics such as managing trials, creating electronic inventory using import profiles and more.

Objective

Users already experienced in the basics of managing e-resource in Alma will learn even more ways to leverage Alma's workflows and options.

© 2019 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

Audience for this session

- Electronic services librarians
- Acquisitions staff
- Trial Operators/Managers

© 2019 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

1. Starting and Managing Trials
2. Managing E-Resources Using Import Profiles
3. Ongoing Management
4. Configuration Options

short break

Starting and Managing Trials

General Workflow

Set up a Trial

© 2019 Ex Libris | Confidential & Proprietary

General Workflow of a Trial (a.k.a., Evaluation)

- PO Line must be in review (not yet ordered)
- Trial Details:
  - Start and end dates
  - Survey form (questionnaire)
  - Participants
  - Public or private
- Activate service but don’t make it Available
- After trial ends: Analyze results of survey

© 2019 Ex Libris | Confidential & Proprietary

Set Up a Trial

1. Begin Order as usual, but Save and Start Trial
   (or Request Evaluation if you can't start trial)
2. Enter Trial Details (dates)
3. Save
4. Add survey questions and participants
5. Row-action: Activate
   a) Mark Bib as suppressed
   b) Activate Service
   c) *Don't* make service Available!
6. Later: Read Analysis

Demonstration

© 2019 Ex Libris | Confidential & Proprietary

1. Starting and Managing Trials
2. Managing E-Resources Using Import Profiles
3. Ongoing Management
4. Configuration Options

Managing E-Resources Using Import Profiles

General Workflow

Set Up and Run the Import Profile

© 2019 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

General Workflow of E-Resources Import Profile

1. Acquisitions > Import > Manage Import Profiles
2. New Order / Update Inventory / Repository
3. Create new import profile > Repository w/Electronic inventory

© 2019 Ex Libris | Confidential & Proprietary

Set Up and Run an Import Profile

1. Set up and run an import profile to create electronic inventory
2. Review key fields
3. Inventory options, collection w/portfolios, single portfolio
4. Activate resources

Demonstration

© 2019 Ex Libris | Confidential & Proprietary

1. Starting and Managing Trials
2. Managing E-Resources Using Import Profiles
3. Ongoing Management
4. Configuration Options

Ongoing Management of E-Resources

Deactivate E-Resources

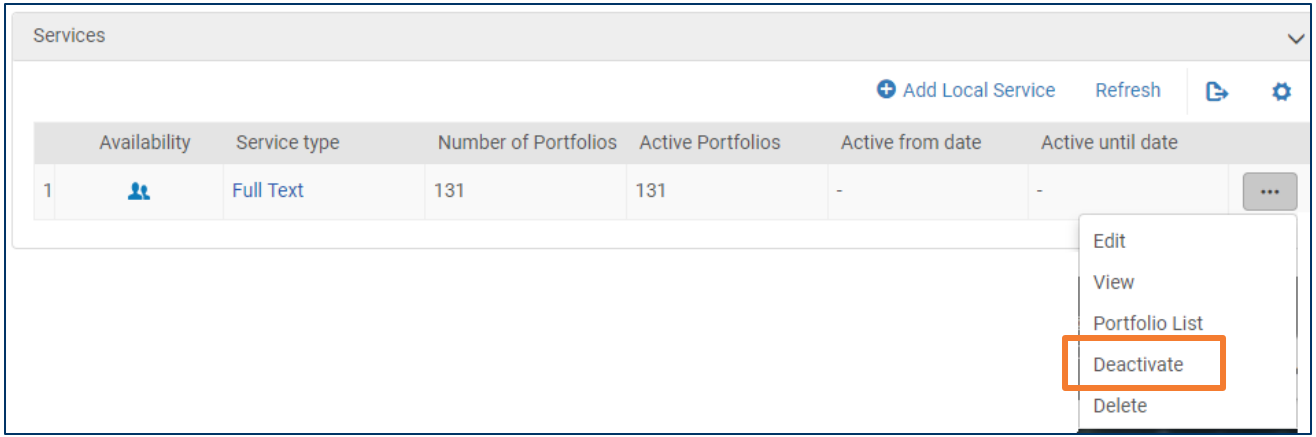
Delete E-Resources

© 2019 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

Deactivate Collections - Manually

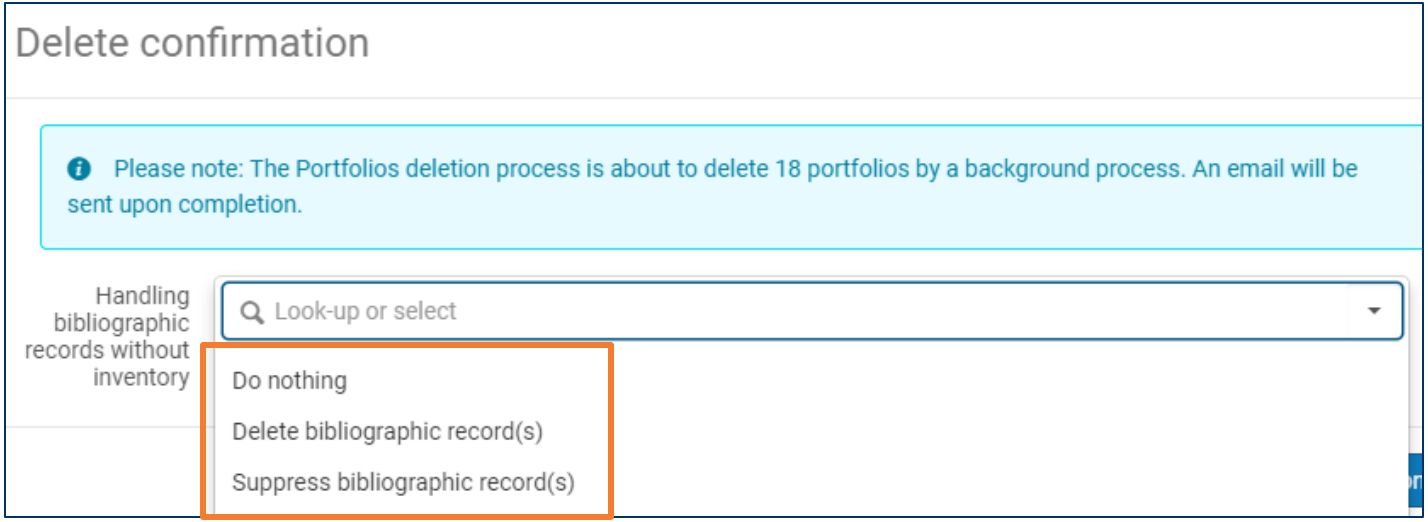
- Search for the collection (in IZ)
- Edit Collection
- Select Additional Information tab
- Services – Row-action: Deactivate



© 2019 Ex Libris | Confidential & Proprietary

Delete Resources - Manually

- Search for the resource
- Row-action: Delete
- Choose how to handle bibliographic records without inventory:



© 2019 Ex Libris | Confidential & Proprietary

1. Starting and Managing Trials

2. Managi g E-Re urces Using
port fil

3.

4. Co ngu ion tions

Break time!
(5 min.)

Configuration Options

- Inactive Services
- Inactive Proxies
- Inventory Mgmt. Groups
- Patron Access
- Overlap Analysis
- Community Zone Updates

© 2019 Ex Libris | Confidential & Proprietary

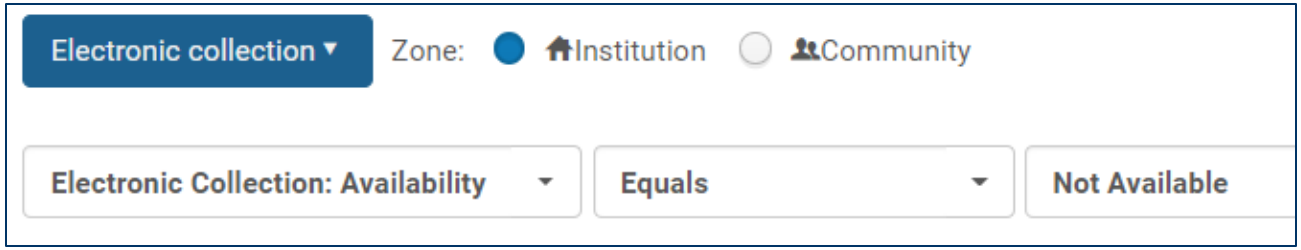
ExLibris a ProQuest Company

Locate Active Collections w/Inactive Services

Find active collections with inactive services:

Search Institution Zone for Electronic Collection, where:

- Electronic Collection (Availability) – Equals – Not Available



© 2019 Ex Libris | Confidential & Proprietary

Check for Inactive Proxy Settings

Find collections with inactive proxy for:

- Collection or Service
- Portfolios

Search Institution Zone for Electronic Collection, where:

- Proxy Enabled – Equals – No

© 2019 Ex Libris | Confidential & Proprietary

Configuration Options

Inactive Services
Inactive Proxies
Inventory Mgmt. Groups

Patron Access
Overlap Analysis
Community Zone Updates

© 2019 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

Inventory Management Groups

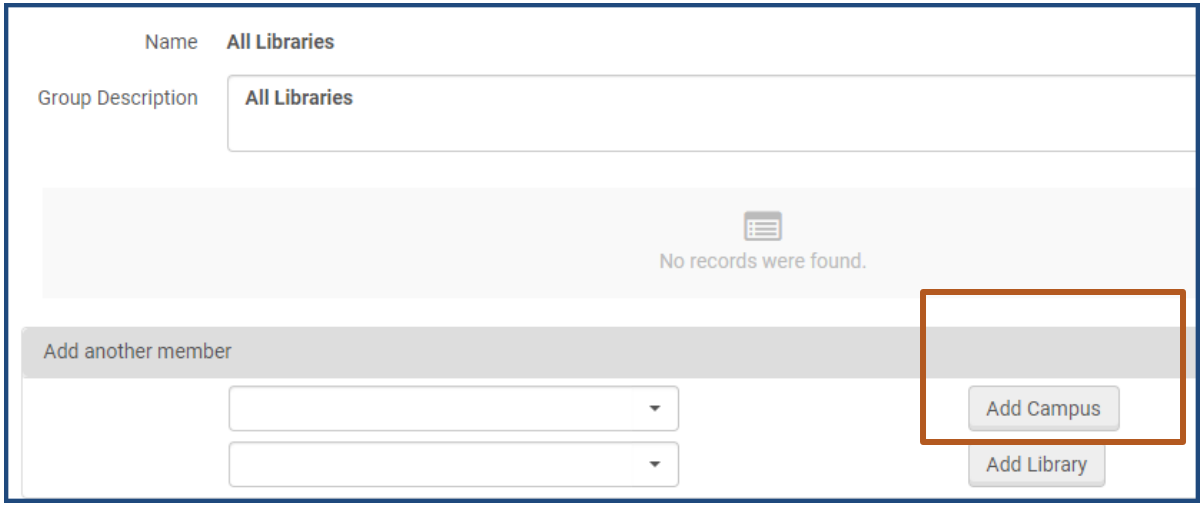
- Libraries or campuses (or both) must have different IP address ranges
- Alma must be configured for multi-campus inventory management
  - Inventory “Available For” Management Groups

© 2019 Ex Libris | Confidential & Proprietary

Configure Patron Access

1. Configuration Menu > Resources > General > Inventory Network Groups
2. Choose a Group > Actions > Edit
3. Add Campus or Library > Save

Demonstration



© 2019 Ex Libris | Confidential & Proprietary

Overlap Analysis Reports

1. Menu: Resources > Overlap and Collection Analysis
2. Submit New Report
3. Choose Report Type: Set Comparison
4. Add Source Electronic Collection (must be from IZ)
5. Add Target Electronic Collection (can be from IZ or CZ)
6. Choose match method (for example, ISSN, title, 035)
7. Run the job.

Demonstration

© 2019 Ex Libris | Confidential & Proprietary

Configuration Options

Inactive Services
Inactive Proxies
Inventory Mgmt. Groups

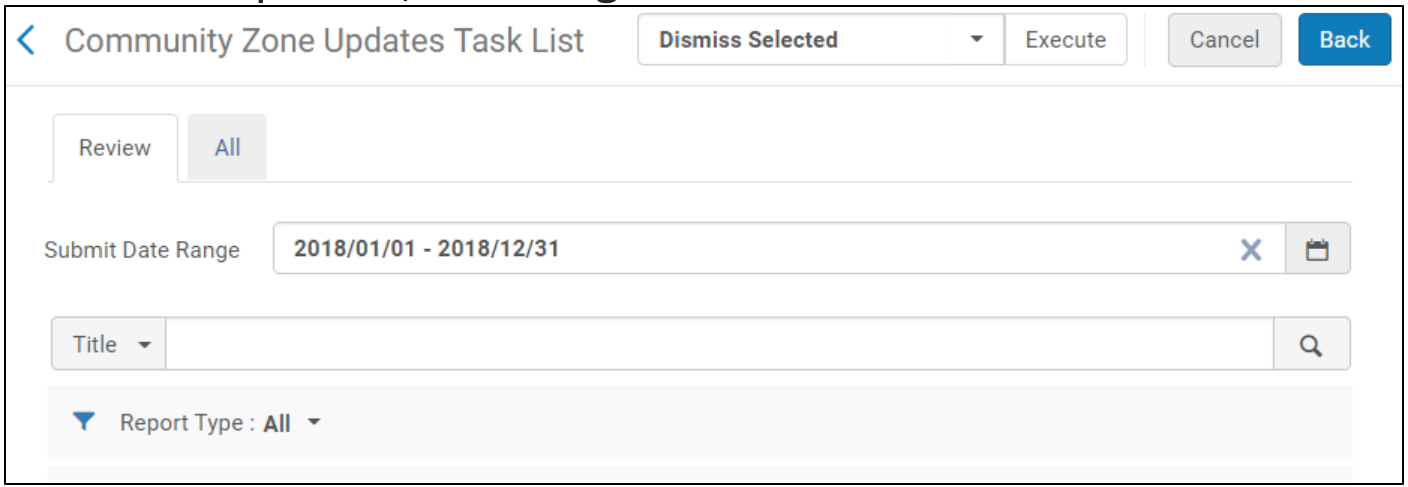
Patron Access
Overlap Analysis
Community Zone Updates

© 2019 Ex Libris | Confidential & Proprietary

ExLibris a ProQuest Company

Community Zone Updates

- Mostly happen Sunday at midnight (your local time)
- Displayed in the Community Zone Updates Task List
  - **Review** tab: Updates that require your action
  - **All** tab: All updates, including automatic



© 2019 Ex Libris | Confidential & Proprietary

1. Starting and Managing Trials
2. Managing E-Resources Using Import Profiles
3. Ongoing Management
4. Configuration Options
5. Wrap-Up

Next Steps and 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)

© 2019 Ex Libris | Confidential & Proprietary

Questions?

ExLibris
a ProQuest Company

Tell us what you thought!

Fill out the survey
on the
Ex Libris Events app!

ExLibris
a ProQuest Company