Getting the Most from Alma

Managing Combined Print & Electronic Journal Subscriptions

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Introduction

Many vendors offer combined subscriptions for the electronic and print versions of a journal. The library needs to therefore manage both the online access to the publication, as well as managing the print holdings.

Additionally this type of subscription is invoiced once by the vendor. This means that library staff have to be able to record a PO Line for one subscription, but also need to separate out the print from the electronic, so that both can be managed well and efficiently. In addition, both have to be managed as part of one bibliographic record.

Alma offers a smart, efficient workflow that caters for this type of scenario.

The Alma Workflow

Alma supports a workflow for creating a PO line for the electronic version of the subscription.

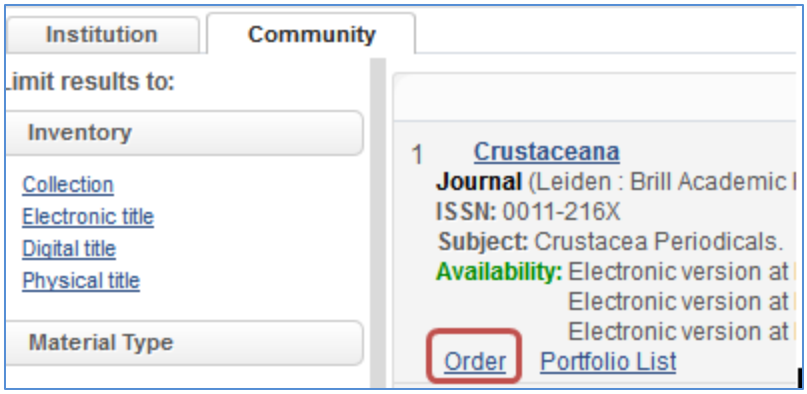
We will then create a linked PO line for the Print version. One PO line will have the price of the subscription – the other won't have any price information. The two will automatically be linked together. In addition to being able to efficiently manage the E and the P versions of the title, this information is also important for Alma Analytic reports in that there will be a clear differentiation between P and E inventory of the title.

Searching the Community Zone for the Journal Title

We'll start our workflow by searching the Alma Community Zone for our journal title.

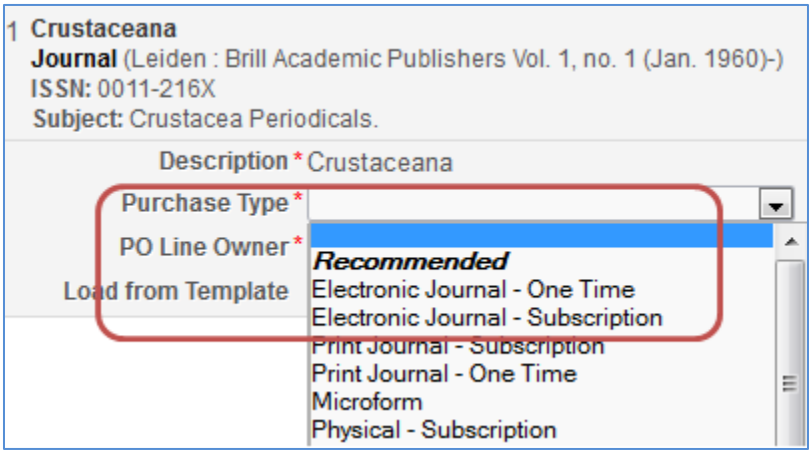
We'll choose as our example the journal 'Crustaceana'. The price of the print + online subscription for 2013 (vol. 86), is $1980.

Once we have found the title in the Community Zone, all we need to do is to click on the Order hypertext link to start the acquisitions workflow for the title. As part of this workflow Alma links this title to our Institution as well as indexing the relevant fields.



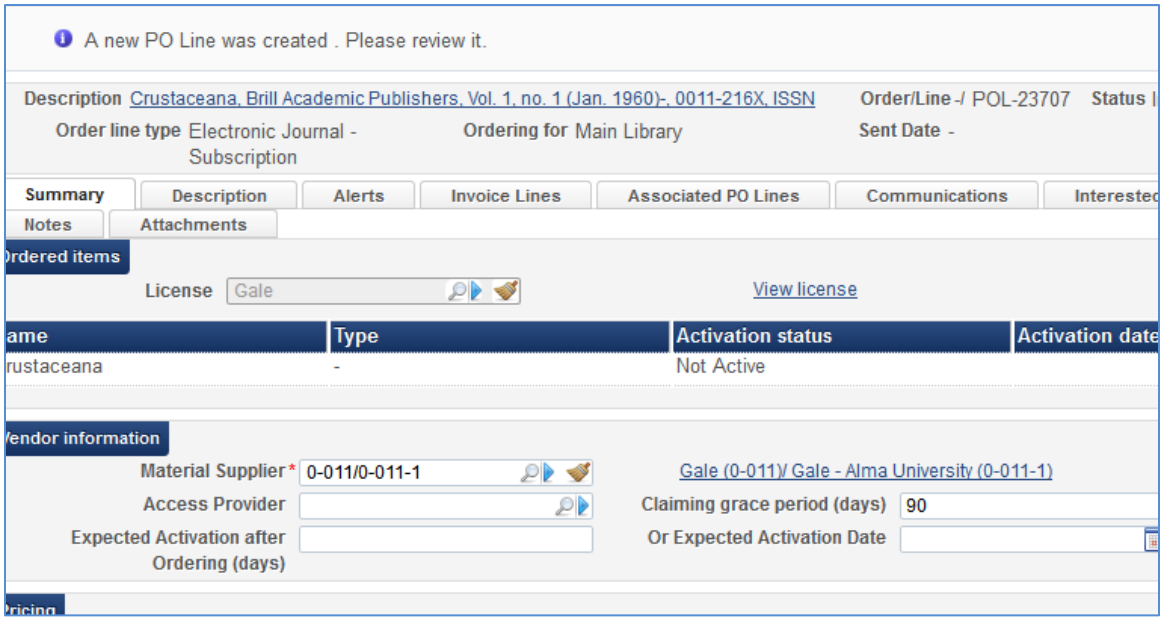
Creating the Order

On the initial order screen we are offered a list of suggested purchase types – based on the material we are ordering. We choose the library, and then can also utilize order templates that have been defined either for all staff, or for private use.



Once we have made these choices, the PO Line is opened for editing.

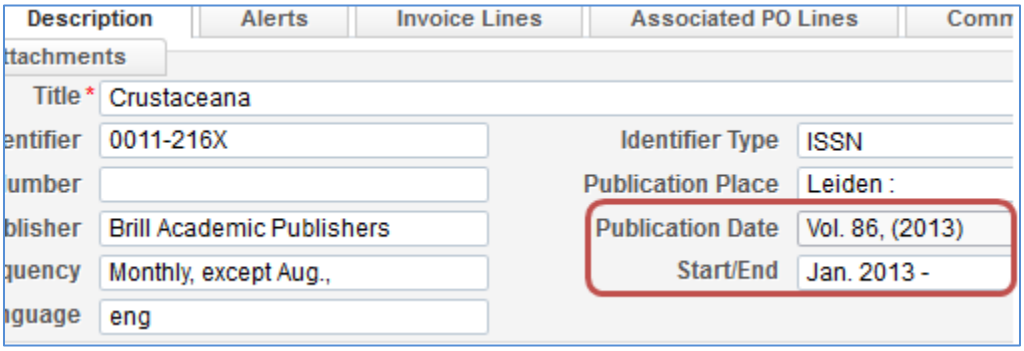
As we chose to use a predefined template many of the fields in the PO Line are already populated.



Note the bibliographic description at the head of the PO Line. This is a generic description of the journal title with information about its first publication in 1960. It would be very useful if we could indicate that our order is for Vol. 86, 2013.

Alma caters for such functionality in a very simple manner. The Description tab (to the right of the Summary tab), allows for modifying the bibliographic data – with regard to the item being ordered.

We'll switch to this tab, and modify the information:



On the Summary tab of the order we will fill in additional information including the price and the fund. We will then send the order to the vendor.

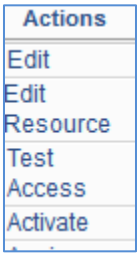
Activating the E-Journal

Once the item has been ordered the electronic subscription needs to be activated.

Based on our roles and authorizations we will be able to find the title in our Task List – under the title Electronic Resources Activation…

The journal title appears in the list of resources waiting for activation (and will be in the "unassigned" tab until a staff user begins working on it.)

From the Actions button we have options to test access, or to activate. We'll simply choose to activate the title.

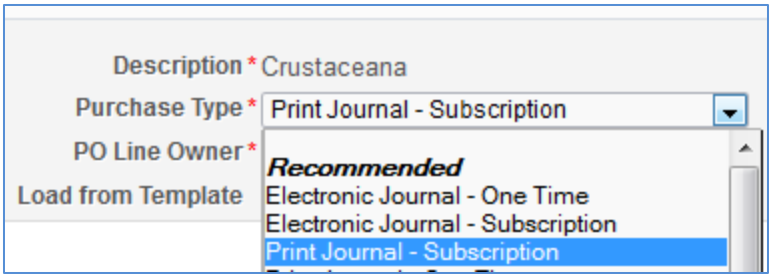


We can search for the title in our local repository. It displays together with the CZ icon.

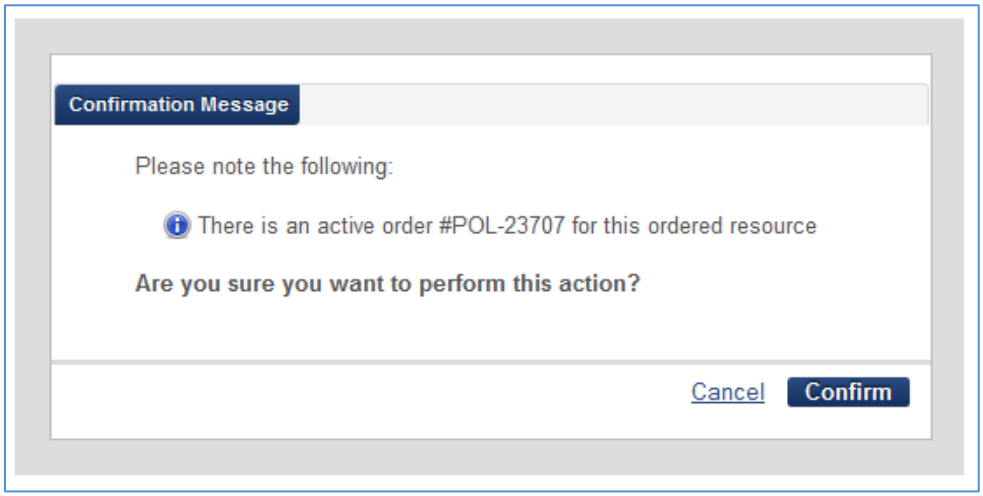
Creating the Order for the Print Version

We have completed the first part of our workflow and now need to order the title for the print version. To start this workflow, from the repository All Titles search we search for our title, and then click on the Order hypertext link. The order will be linked to the same bibliographic record as the order for the e-journal.

This time we will choose a Purchase Type 'Print Journal Subscription'



When we create our order this time around, Alma immediately identifies that there is an active order for the same title, and asks us to confirm that we wish to continue.

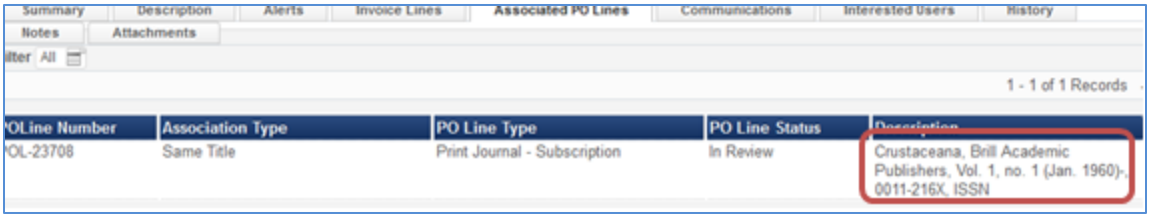


We'll click on Confirm to continue with our order process.

We'll click through to the tab Associated PO Lines. Alma has automatically linked our PO Line for the electronic version to this new PO Line for the print version. We can see summary details of order. Note that the description shows the modified, (Vol. 86, 2013) data rather than the original information.

The PO Line information is hypertext linked, so we can easily navigate to this PO Line.

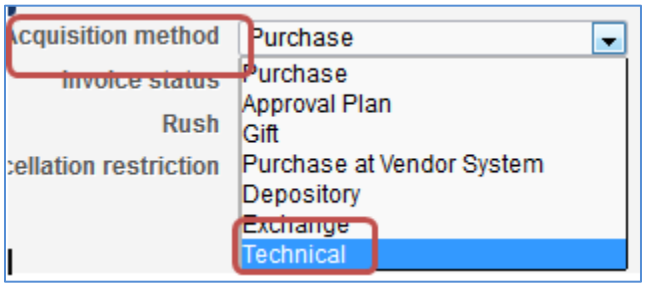
After navigating to the linked PO Line, we'll once again click on the Associated PO Line tab. We can now see view that Alma has already linked our new PO Line to this PO Line. However, note that the description does not yet reflect updated data, and that the status of the PO Line is In Review.



We can simply click on the Back to PO Line List hypertext link to go back to the PO Line for the print title.

Once again we'll change the information in the Description tab, to reflect the year and volume information for the order.

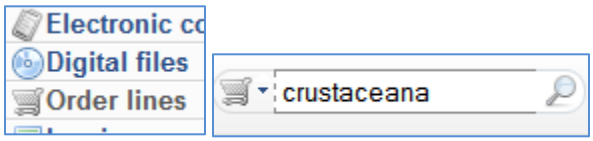
On the Summary tab of the order we will not fill in price or fund information as this has already been defined on the linked PO Line. Normally these fields are mandatory. However, choosing the Acquisition Method 'technical' allows for creating orders without fund or price information. In addition, technical orders are not sent to the vendor.



Once all the relevant fields have been populated, we will send the order to the vendor.

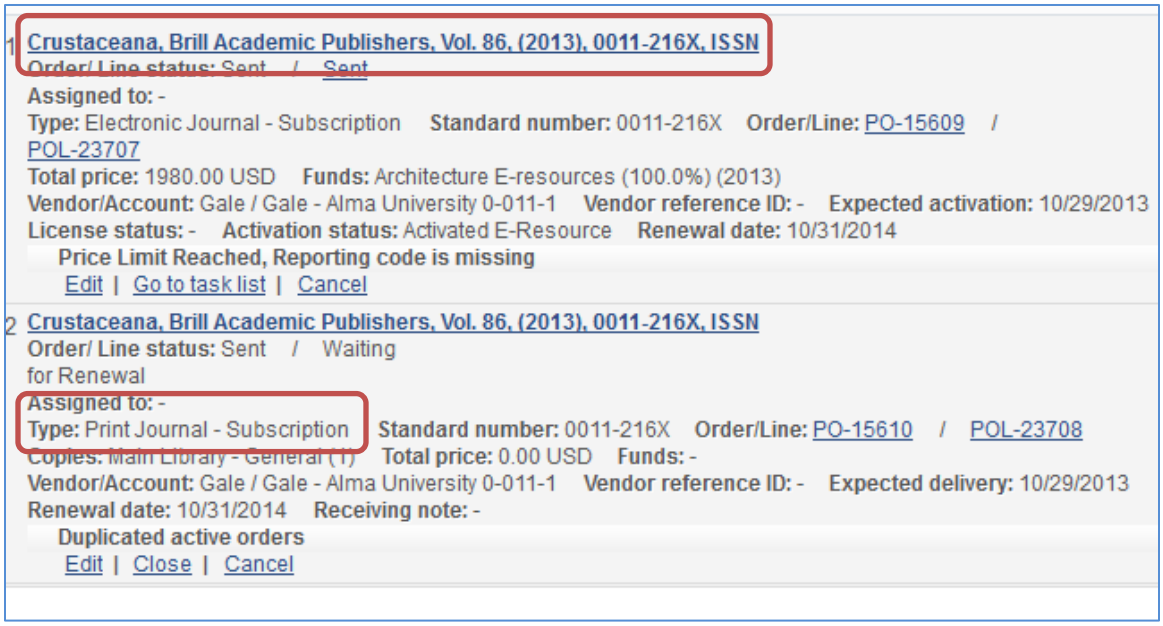
Searching for the Orders

To check that both orders appear in Alma, we'll search the Quick Search box on the Persistent Menu Bar – by Order Lines. We'll input the title name, rather than the PO number



Our two Purchase Orders display. Note that:

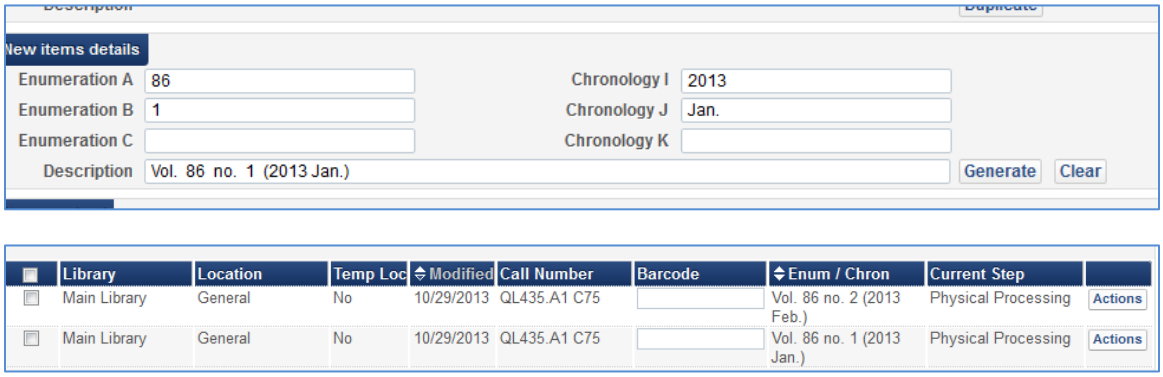
- The title display reflects the update we made to the description
- Each Purchase Order clearly displays the material type



Receiving Print Issues

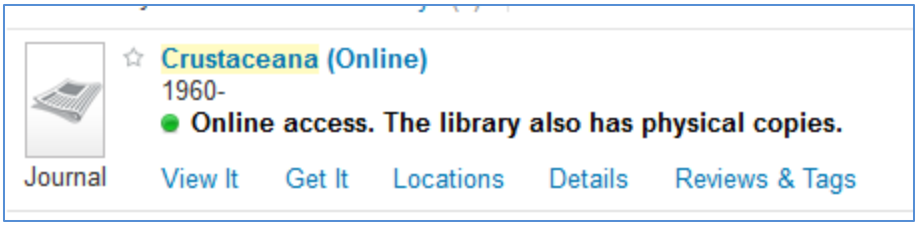
The last step in our workflow is to receive print issues of our journal title.

As the issues arrive, they can be checked-in on the Alma Receive screen.



Viewing the Journal in Primo

A patron searching for this journal title in Primo, will immediately be able to see that the library offers online access, as well as holding physical copies.



The patron can click on the View It link to navigate to the full text of the journal.

Clicking on the Get It link will display the print issues that have been received by the library.

Conclusion

Alma offers rich efficient workflows for handling common library oriented tasks. The workflow for linking print and electronic subscriptions together is simple, and easy to manage. The workflow ensures that while the electronic and print subscriptions are automatically linked together, each element is separate – important for tracking information in Analytic reports and statistics, as well as for the patron viewing the record in Primo.