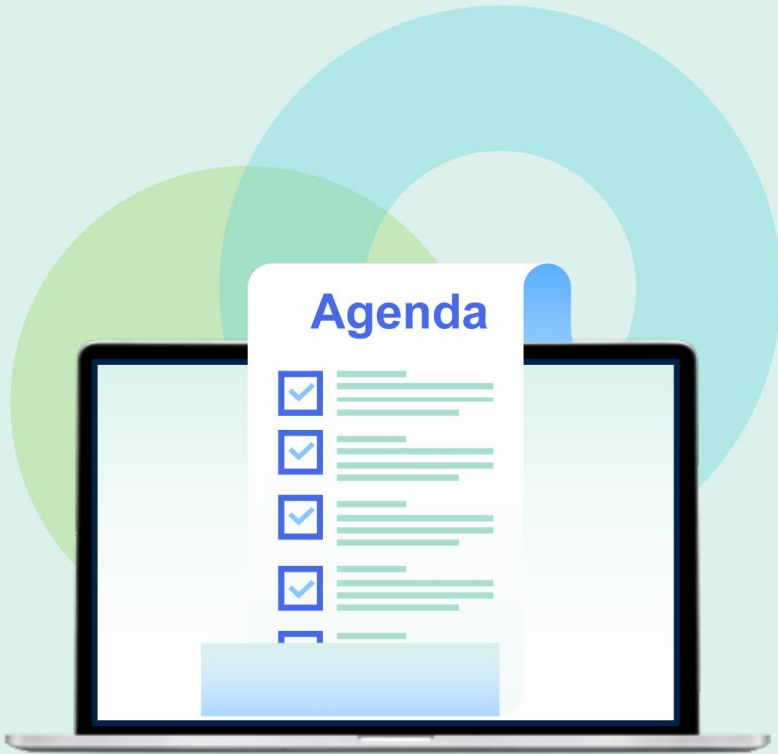




# Electronic Resource Management

Update on New and Upcoming Features

Dana Moshkovits | Director of Product Management



- ProQuest Ebook Central Automatic Upload of Electronic Holdings
- Wiley Automatic Upload of Electronic Holdings
- Limit Electronic Resource Management Actions According to User Role Scope
- Identify & report broken links
- CZ Update Task List Improvements
- Overlap Analysis Improvements

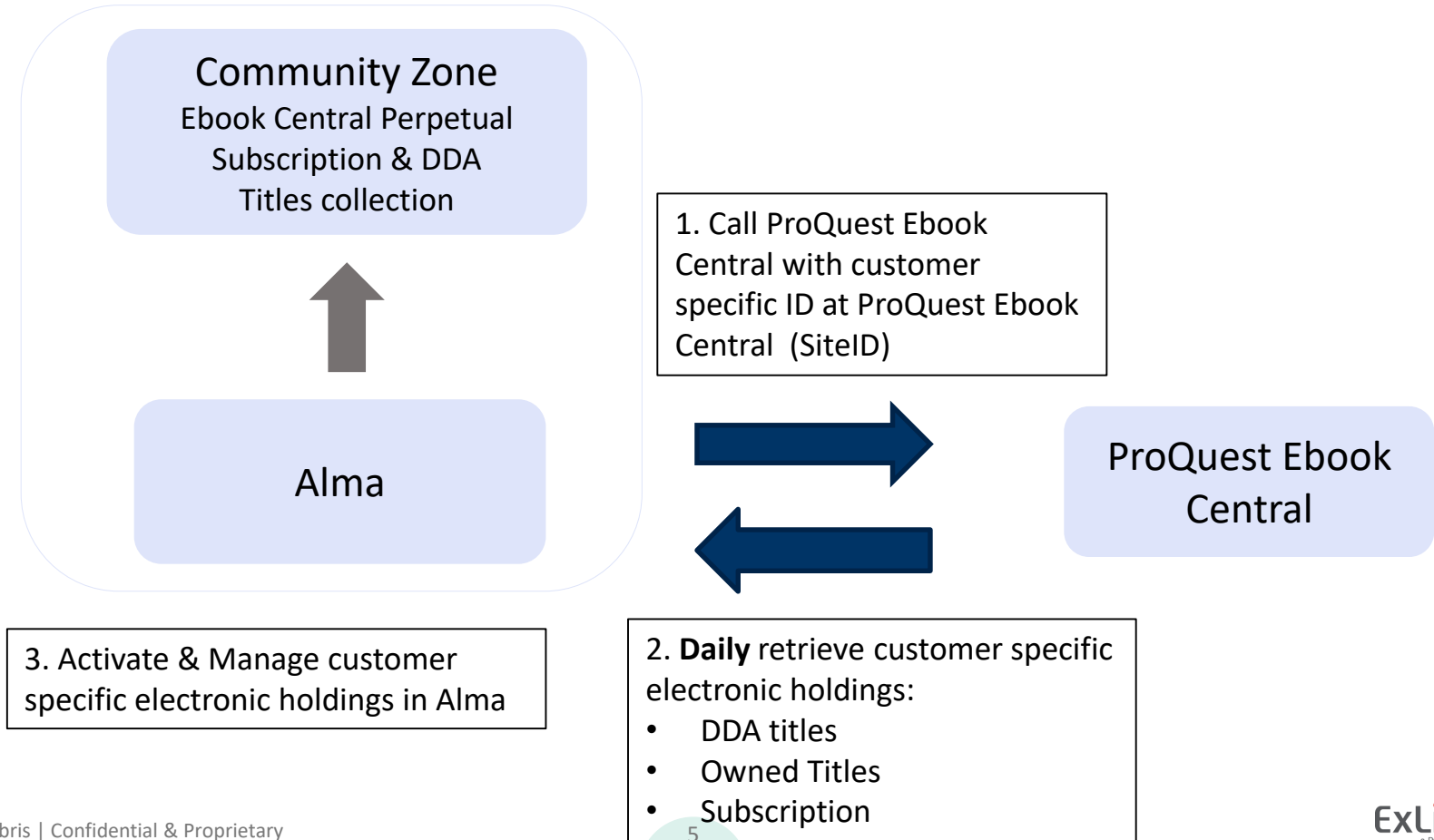


# ProQuest Ebook Central Automatic Upload of Electronic Holdings

# Managing ProQuest Ebook Central Content Efficiently

- Upload Electronic Holdings from ProQuest Ebook Central replaces the **manual**, multi-step workflow for managing Ebook Central holdings
- Upload Electronic Holdings from ProQuest Ebook Central will automatically manage holdings that originate from:
  - DDA Project with ProQuest Ebook Central
  - Purchases of perpetual access single ebook titles
  - **Ebook titles that are part of subscriptions**

# How Does It work?



# New Functionality

- **Frequency** – instead of full synchronization on a weekly basis the integration runs **daily** incremental processing which is faster and keeps your collection as up-to-date as possible.
- **Subscription titles** - in addition to the activation of ProQuest Ebook Central Owned and DDA titles the integration supports the activation of Subscription titles.
- **Purchase Model Indication** - each Portfolio includes an indication of ProQuest Ebook Central Purchase Model – Owned, DDA, Subscription (including the subscription collection names) therefore we will no longer:
  - Create a Technical-PO Line for Owned titles
  - Associate a PDA profile to DDA titles.

# Thank You to our Early Access Customers



# Availability

- Customers that do not have the integration today will be able to enable it as of **November** release.
- Customers that have integration today can contact support in order to move to the new integration



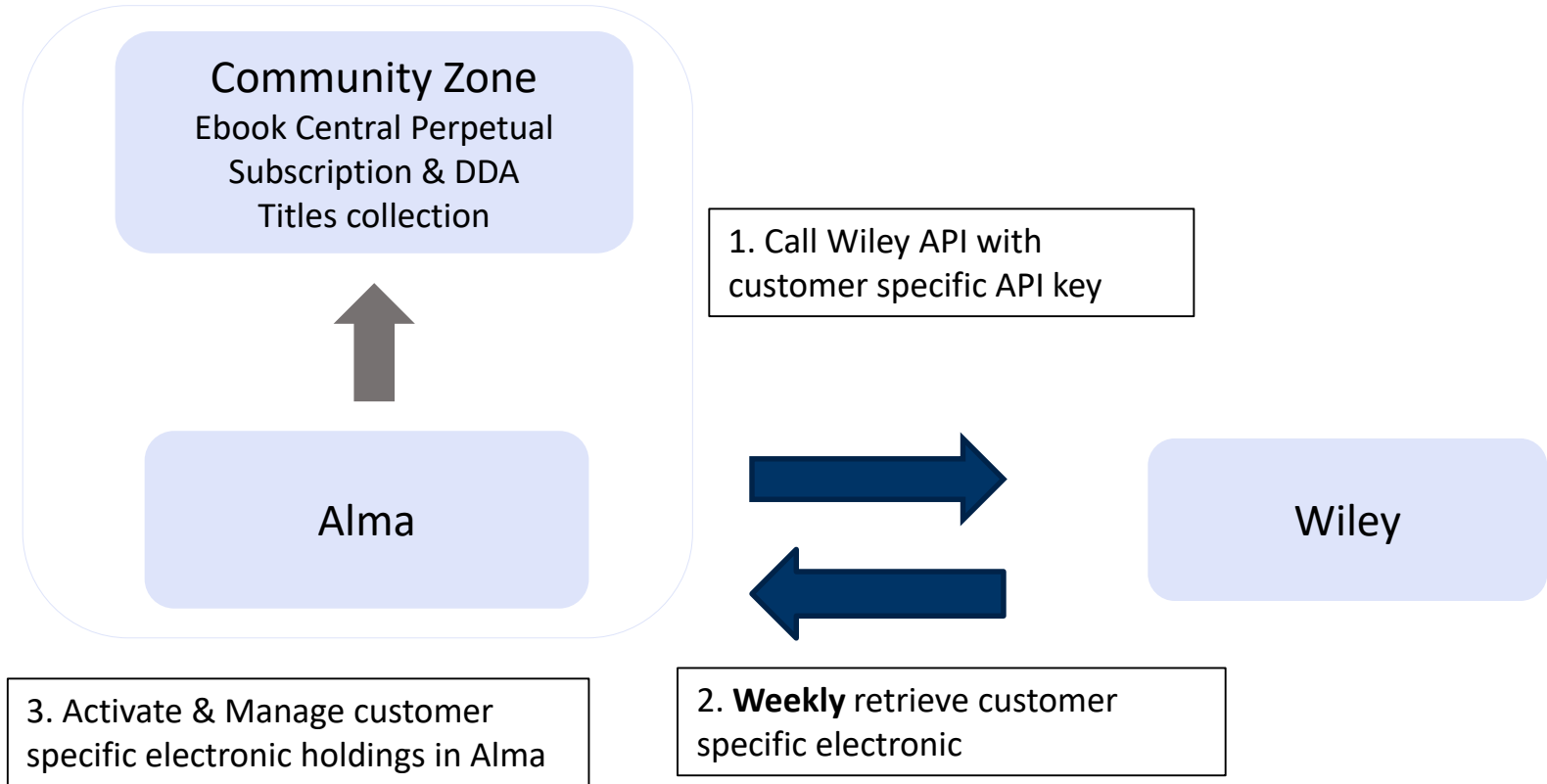


# Wiley Automatic Upload of Electronic Holdings

# Managing Wiley Efficiently

- Upload Electronic Holdings from Wiley replaces the **manual**, multi-step workflow for managing Wiley holdings
- Upload Electronic Holdings from Wiley will automatically manage holdings of electronic journals and electronic books in the same collection
- Integration will run weekly

# How Does It work?



# Wiley Automatic Upload of Electronic Holdings

- Customer specific electronic holdings for Wiley content will be activated automatically
- Integration will run weekly
- New collection in CZ  
Wiley Online Library – AutoHoldings
- Timeline: December 2020





# Limit Electronic Resource Management Actions According to User Role Scope

# Better Control Over Staff Activity Across Libraries

- Staff users will be permitted to perform electronic resource management actions based on the **scope** of their roles.
- Staff user's actions such as edit, update, delete, activate, deactivate etc., will be enabled/disabled based on the scope definition of the user role (specific library level or institution level).
- Scope of resources will be defined at the electronic collection level
- Timeline: Early Access 2021 Q1





## NERS -Identify & report broken links

# Identify & report broken links

- For every link that is directed via Alma link resolver, Alma will attempt to capture HTTP standard failures.
- Link failures will be reported to staff via a dedicated Link Failures task list.
- Staff will be able to work towards correcting the failures.
- Link Failures Task List will include link information including actions such as edit portfolio, dismiss report to Ex Libris
- Timeline 2021 Q2



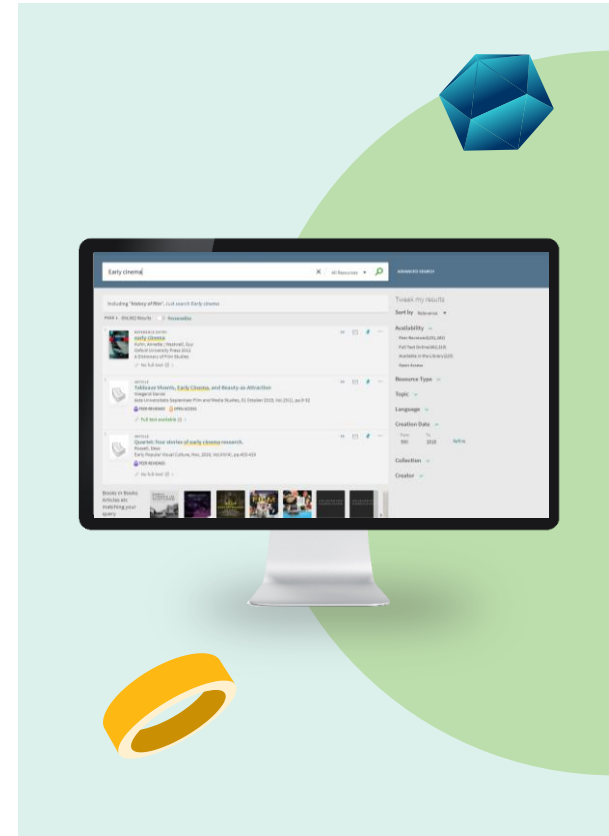




# CZ Update Task List Improvements

# CZ Update Task List Improvements

- Better transparency about Community Zone ongoing updates that might affect the management of electronic resources
- Access point from electronic resource editor to a filtered CZ Update Task List
- Improvements to task list:
  - Date Range - populate with a range of 30 days prior to date of access.
  - Order indication
  - Additional filters
  - Report to Ex Libris
  - Additional report Types
- Time line: 2021 H1





# Improvements to Electronic Activation Workflow

# Electronic Activation Task List

- Better management of electronic resource activation according to a library's specific workflow
- Activation Task List:
  - Better control of activation activity and status setup.
  - Ability to add comments and notes to each activity.
  - Ability to view history of status changes.
- Timeline: 2021 H2 – 2022 H1





# Overlap Analysis Improvements

# Overlap Analysis Improvements

- Better collection development capabilities of libraries electronic resources
- Overlap Analysis Tool
  - UX improvement for selecting content to be compared
  - Summary reporting of overlap analysis report
  - Additional comparing options
- Timeline: 2021H2 -2022 H1





# Thank you!

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