Managing Electronic Collections in Alma

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Introductions

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Objectives and Audience

By the end of this session, you will understand how to manage electronic resources in Alma:

• Acquire
• Order and activate
• Maintain

This session is for both new and experienced Alma users who are new to managing electronic resources.
Agenda

1. Introduction
2. Acquiring E-Resources
3. Activating E-Resources
4. Other Options and Maintenance
5. Summary, Resources, and Survey
User Roles

Necessary user roles to acquire electronic resources...

• A **Purchasing Operator** creates PO Line to order the e-resource
• Upon notification of availability, e-resources are activated by a **Electronic Inventory Operator** or **Repository Manager**
• For electronic resource trials, a **Trial Manager** or **Operator** manages the trial itself
• An **Invoice Operator** finalizes payment details by creating an invoice
Terminology

**Electronic Collection** includes...

- Aggregator Packages
- Selective Packages
- Databases

**Portfolios:** Serial or monograph titles

- Can be standalone entity or *within* a package

**Service:** Services a package offers in its portfolios (for example, full-text or selected full-text) and connection/linking information
Electronic Collection 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-
Navigating the Levels in Alma

- Electronic Collection level
- Portfolio level
- Service level
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General Workflow

1. **Bib data**: Locate record in Community Zone, or create local record.
2. **Order title**: Using order link, create PO line.
3. **Activate**: Test access; make available to public.
4. **Pay**: Create invoice.
I. Link to CZ Record and Order Title

• Locate record in Community Zone and link to it for Institution Zone

• Why link to Community Zone record:
  • If Community Zone record is updated, updates can be applied automatically to Institution record

• How to link to CZ record and order title:
  • Repository Search for Electronic Collection title or Electronic Portfolio title> click Community tab to see results in CZ
  • Click Order link from CZ record to create PO line in Institution
Exercise 1

Identify and order an *electronic collection* from Community Zone:

1. From **Repository Search** select **Electronic Collection** in Find drop-down menu and search for a **Electronic Collection Name** = (ex: Proquest)

2. Click **Community** tab.

3. Locate an Electronic Collection with a small number of Portfolios. (<100)
Exercise 1 (cont.)

4. Click **Order** link to create PO line
   - Purchase Type: *Electronic Collection – One time*
   - PO Line Owner: *Main Library*
   - Click: *Create PO Line*

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- Material Supplier: *Your choice*
- List Price: $**100.00**
- Select and Add Fund: *Your choice*
- Acquisition Method: *Purchase at Vendor System*
- Reporting Code: *Your choice*
- At Go: *Order Now*

5. In your Institution zone, search the Repository for the Collection you just ordered, notice the icon:
Identify and order a portfolio from Community Zone:

1. From **Repository Search** select **Electronic Portfolio** in Find drop-down menu and search for a **Title** contains (ex: Biology)

2. Click **Community** tab to find the Portfolio.

3. Click Order to Create a PO Line
   - **Purchase Type:** *Electronic Title – One time*
   - **PO Line Owner:** *Main Library*
   - Click: *Create PO Line*

Hands On - Activity
4. When the PO Line Form Opens - complete as follows:
   Material Supplier: *Your choice*
   List Price: $30.00
   Select and Add Fund: *Your choice*
   Acquisition Method: *Purchase at Vendor System*
   Reporting Code: *Your choice*
   At Go: *Order Now*

5. Go back to Repository Search; search for electronic portfolio in Institution – notice icon.
II. Create Local Collection and Order Title

*Local* electronic collections can be:
- Selective packages
- Aggregator packages
- Databases

Why create a local collection:
- Electronic resource doesn’t exist in Community Zone

How to create and order a local collection:
- Resource Management > Create Inventory > Add Local Electronic Collection
- Once record is created, click *Order* link
Add Bib Record or URL to Electronic Collection

In addition to portfolios, electronic collection can also include:

- Bibliographic record describing electronic collection
- URL to native interface of the electronic collection
Create a Local Electronic Collection Record (demo)

1. Resource Management > Create Inventory > Add Local Electronic Collection.

2. Complete the mandatory fields in the Electronic Collection Editor form: Public Name / Collection Type / Service Type

3. On **Activation Information** tab, update fields or leave default values:
   - Service Activation status
   - Activate new portfolios associated with service automatically
   - Active to and from dates
4. Additional Information tab > Service Type > Full Text

5. On the **Linking Information** tab:
   - Parser Parameters:
   - Linking or Access information for the service

6. On the **Portfolios** tab: Click *Add a Local Portfolio*

7. Fill out fields as needed, then *Save and Done.*
Create a local electronic collection for a database and order title:

1. Go to **Resource Management > Create Inventory > Add Local Electronic Collection**.
2. Select collection type of **Database**. Fill in details and click **Save and Continue**.
3. Enter details and in **Additional Information** tab:
   - Electronic Collection Level **URL**
   - Find/link to bib record in Additional Descriptive Information field
4. Click **Save**; Click **Order** link.
III. Create Local Portfolio and Order Title

• Local portfolio records can be created for standalone portfolio titles

• Why create a local portfolio:
  • Electronic resource doesn’t exist in Community Zone

• How to create and order a local portfolio:
  • Resource Management > Create Inventory > Add Local Portfolio
  • Once local portfolio record is created, click Order link
Link Standalone Portfolio to Electronic Collection

Optionally can link locally created standalone portfolio to an electronic collection:

[Diagram of Electronic Portfolio Editor interface with highlighted 'Attach to an electronic collection' button]
1. Go to **Resource Management > Create Inventory > Add Local Portfolio**.

2. Enter details and then click **Save**:
   - Creation type: choose either create new title or use existing title
   - Portfolios type: Standalone
   - Enter coverage information & URL
   - Availability status: Inactive

3. Click **Order** link to create PO line.
Link Local Record to CZ Record

• Optionally can link locally-created collections to Community Zone records
• Linking to Community Zone collection automatically applies any updates to your Institution collection
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Electronic Resource Activation

Accessed from Task List or Resource Management menu:

- Digitization requests - approval (2)
- Electronic resources - activation - assigned to you (7)
- Electronic resources - activation - unassigned (6)

RESOURCE MANAGEMENT

- Manage Inventory
- Community Zone Updates Task List
- Manage Electronic Resource Activation
Activate appears in Actions menu if electronic collection is *not* active

- For locally-created collection:
  - Activates linked services and portfolios (if exist)
  - Make edits in collection editor as needed
- For CZ-linked collection: Opens activation wizard
Test access appears in Actions menu if electronic collection or portfolio has either of the following:

- Bibliographic record and URL associated with it
- Services associated with it
Suppress/Unsuppress action appears if electronic collection has an unsuppressed or suppressed bibliographic record linked to it and a URL.

Clicking it will change the value to its opposite, suppressing or un-suppressing the bibliographic record from being published to Primo.
Activation and Testing Completed

• Select **Done** when completed with testing and resource is activated
  • Electronic Resource removed from activation task list

• Before selecting **Done**:
  • If electronic collection has a bibliographic record linked to it, confirm that it is not suppressed
  • If electronic collection has services, confirm they are active
Activate electronic collection:

1. Go to Manage Electronic Resource Activation task list (unassigned) and find an electronic collection you ordered previously. (from Exercise #1)

2. Click Actions > Activate and go through wizard, entering details as applicable.

Select check boxes:
- Activate this electronic collection service
- Make service available.
3. Go back to Activation task list (assigned to me) and click **Test Access**.

4. Go back to Activation task list (assigned to me) and click **Done**; electronic resource removed from activation list.

5. Search for electronic collection in Repository; notice icon is now in color.
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Deactivate/Delete Portfolios

• Manually deactivate full text service and/or delete bib record for electronic collection or portfolio records
• Bulk-delete portfolio records via Repository or Update Inventory Import Profile
  • d in position 5 of the leader of bib record
  • if portfolio has PO line connected, will deactivate portfolio instead of deleting it
Ongoing Maintenance: Community Zone Updates

- Community Zone updates happen on a weekly basis
- Release notes in Ex Libris Documentation Center under Alma > Weekly CKB Updates

Community Zone Updates Task List includes:

- Portfolio deleted from non auto-active package
- Electronic collection deleted
- Electronic collection linking parameters update
- Portfolio coverage update
- Portfolio linking parameters update
- Electronic collection base url updated
- Electronic collection service deleted
- Electronic Collection Bibliographic Record Update
Community Zone Updates Task List

- **Review tab**: Records which you may need to review and make updates
- **All tab**: *All* changes and updates to Community Zone records
  - Note: Use filter to see if portfolios were *automatically* added or deleted from auto-active packages
Overlap Analysis Reports

- Compare sets of electronic collections to identify overlapping titles between collections
- Download an Excel file of specific portfolio titles (ISSN, LCCN, IBSN, or Titles) to determine if they exist more than once in the repository
- Can be used for collection development purposes
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During this session, you learned how to:

• Conduct workflows for acquiring and activating electronic resources
• Configure/set-up other electronic resource options
• Conduct ongoing maintenance using Community Zone Updates Task List
Resources

• Helpful Documentation:
  • Managing Electronic Resources
  • Electronic Resources – Scenarios and Workflows
  • Adding a Local Collection
  • Working with Electronic Collection Bibliographic Records and URLs Added to the Community Zone

• Additional support resources within the ExLibris Ecosystem:
  • Idea Exchange
  • System Status Pages: Single Tenant ENV / Multi-Tenant ENV
  • Developer Network

• Technical Seminar Presentations
  (located in the Cross-Product section of the CKC)
Session Evaluation

Please enter the following link into your browser:

https://www.surveymonkey.com/r/techsem2017