

Verde Functional Training

Knowledgebase Tools

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Verde Functional Training Where We Are

- **Acquisition – Record, Lifecycle, Loaders and Reports**
- **Licenses**
- **Access, Administration, Cost and Usage Attributes**
- **KB Tools**
 - **Administration Module**
 - **Trials**



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Training Agenda

- **KB Tools**
 - 1) **Reports**
 - 2) **Tasks**
 - 3) **Loaders**
 - 4) **Scheduling and Customizing Output**



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Training Agenda

- **KB Tools**

- 1) **Reports**

- **Report Types**
- **General Report of e-Products**
- **Report e-Products by Selection Status**
- **Report on e-Packages with Acquisitions**
- **Report on Locally Created e-Products**
- **Report on e-Products with Usage Statistics**
- **Report on e-Products Without Licenses**

- 2) **Tasks**

- 3) **Loaders**

- 4) **Scheduling and Customizing Output**

Let's see how it looks



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KnowledgeBase Tools

Verde Tasks | KB Manager | **KB Tools** | Admin | Languages | Logout | Help
Welcome Administrator
Ex Libris University

Select a tool: Report

- Report
- Task
- Loader
- View Report Output
- View Task Output
- View Loader Output
- View KB Reports
- View Scheduled Tasks

- General
- Report on e-Products by Selection Status
- Report on e-Packages with Acquisitions
- Report on Locally Created e-Products
- Report on e-Products with Usage Statistics
- Report on Active e-Products without Licenses

- **KB Tools** module hosts a set of **reports, tasks** and **loaders**

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Verde Reports

- e-Product:
 - General Report of e-Products
 - e-Products by Selection Status
 - e-Packages with Acquisitions
 - Locally Created e-Products
 - e-Products with Usage Statistics
 - Active e-Products without Licenses
- License:
 - IP Ranges by Licensor



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General Report of e-Products

- **Input** parameters:
 - E-Product details
 - Statuses
 - Dates
 - Package type
 - Acquisitions terms
 - License terms etc...
- **Output**:
 - E-Product,
 - Acquisitions
 - License details
- **Be careful with size**
- Too much **data**
- Too many **filters**

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Report e-Products by Selection Status

- **Input** parameters:
 - E-Product details
 - Selection status
 - Dates
 - Sponsoring library
 - Acquisitions details
 - Vendor
- **Output:**
 - Basic e-product
 - and acquisitions details

Task properties

Selection status: Approved
Evaluation
Final Approval

Start Date: []

End Date: []

Vendor: []

Sponsoring Library: []

Selector: []

Category: []

Include Constituents:

Report on e-Packages With Acquisitions

- **Input** parameters:
 - Instance
 - E-Product details
 - Dates
 - Package type
 - Acquisitions details
 - Vendor
 - Auto renewal settings
- **Output:**
 - Basic e-product
 - and acquisitions details

Task properties

Run on instances: INST2
Instance one
Ex Libris University

Sort by: Package Title

Report type: Subscription start date

Start date: []

End date: []

Filter

Package type: []

Vendor: []

Auto renewal type: Yes No Ignore

Report on Locally Created e-Products

- **Input** parameters:

- Instance
- E-Product details
 - Active
 - E-Product type
 - Dates

- **Output:**

- Basic e-product details

The screenshot shows the 'Task properties' dialog box with the following settings:

- Run on instances: INST2, Instance one, Ex Libris University
- Sort by: E-Product Title
- Report only active e-Products:
- e-Product type: e-Interface, e-Package, e-Standalone, e-Constituent
- Creation from date: [empty]
- Creation to date: [empty]

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Report on e-Products with Usage Statistics

- **Input** parameters:

- Instance
- E-Product details
 - Active
 - E-Product type

- **Output:**

- Basic e-product details

The screenshot shows the 'Task properties' dialog box with the following settings:

- Run on instances: INST2, Instance one, Ex Libris University
- Sort by e-Product title:
- Report only active e-Products:
- e-Product type: e-Interface
- Include constituents:

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Report on e-Products Without Licenses

- **Input** parameters:
 - Instance
 - E-Product details
 - E-Product type
 - E-Product status
 - Sponsoring library
 - Dates
- **Output:**
 - Basic e-product details

Task properties

Run on instances: Charles River Consortium, CKB, JFK College

e-Product type: e-Package, e-Standalone, e-Interface

e-Product status: Trial, Implementation 1

Sponsoring library: []

Selector: []

Activation from date: []

Include constituents:

Next: Tasks



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Training Agenda

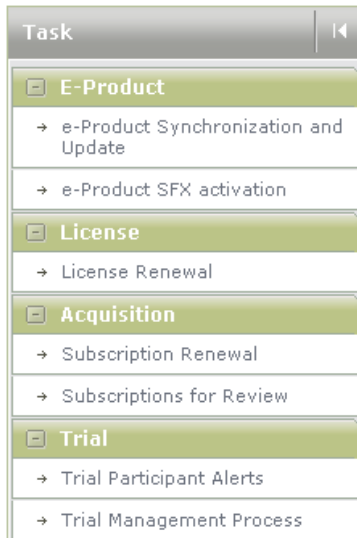
- **KB Tools**
 - 1) Reports
 - 2) **Tasks**
 - License Renewal
 - Subscription Renewal
 - Subscriptions for Review
 - Trial Participants Alerts
 - Trial Management Process
 - 3) Loaders
 - 4) Scheduling and Customizing Output

Let's see how it looks



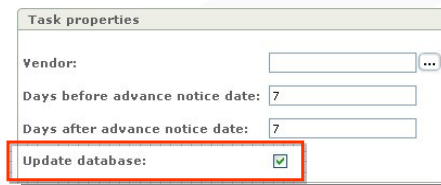
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Tasks



- **KB Tools** module hosts **six tasks** for different activities

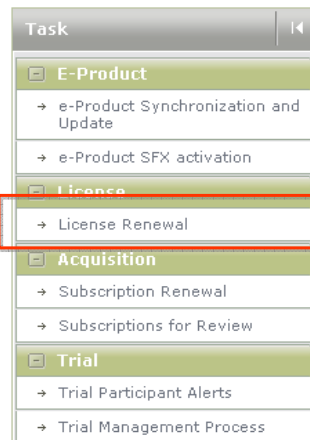
- To generate a report without performing the task, uncheck **Update database**.



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License Renewal

- Retrieves licenses eligible for renewal
 - **License Status**=*Approved*
 - **License end date**<Today
- If **Renewal Type**=*Automatic*
 - Extends **License end date**
 - Updates **Date Renewed** field
- If **Renewal Type**=*Explicit*
 - Reports license for review and manual renewal



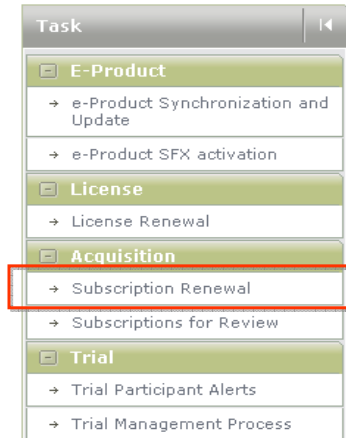
Also runs in report mode

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Subscription Renewal

- Retrieves acquisition records eligible for automatic renewal
 - **Auto Renewal**=Yes
 - **Status**=Active
- Opens a new acquisitions record
 - **Status**=Active
- Updates existing acquisitions record
 - **Status**=Renewed
- Triggers renewal of associated licenses

Also runs in report mode



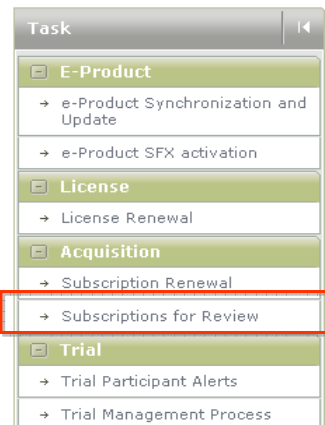
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Subscriptions for Review

- Retrieves acquisition records eligible for manual renewal
 - **Auto Renewal**=No
 - **Status**=Active)
- Updates e-product record
 - **Selection status**=Review

Also runs in report mode

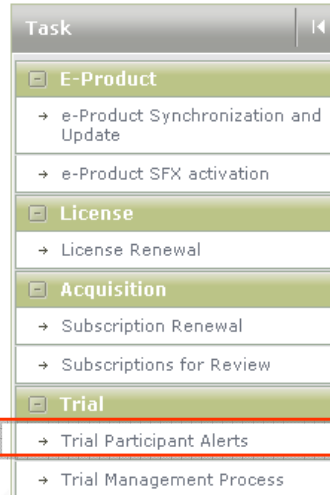


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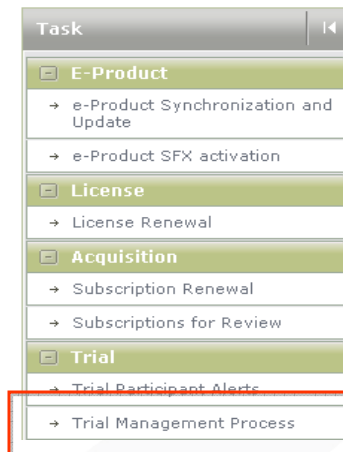
Trial Participants Alerts

- Emails trial participants on the following occasions:
 - Trial start
 - Before trial end (according to the **Advance notification period** field)
 - Trial end
 - Decision required



Trial Management Process

- Changes trial status on the following occasions:
 - When **Start date** arrives, changes trial **Status** field
 - *On Trial (On Hold)*
 - When **End date** arrives, changes trial **Status** field
 - *Trial Over*



Also runs in report mode

Next: Loaders

Training Agenda

- **KB Tools**

- 1) Reports

- 2) Tasks

- 3) **Loaders**

- Acquisitions Loader
- License Loader
- Many Others

- 4) Scheduling and Customizing Output

Let's see how it looks



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Loaders

- Automatic tools to load data available for:
 - Organizations
 - Library
 - E-products
 - Acquisitions
 - Licenses
 - Adm
- Template files on server in *Examples and Templates directory*

Loader	
Organizations	
→ ALEPH Vendors Converter	
→ Organizations	
→ Organization Contacts	
Library	
→ Libraries	
→ Library Contacts	
→ Library IPs	
e-Product	
→ e-Standalone	
→ e-Constituent	
Acquisition	
→ Acquisitions	
License	
→ Licenses	
Admin	
→ Admin	
→ AdminLocal	
Access	
→ Access	
→ Access Authorization	

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Acquisitions Loader

- Creates acquisitions records
- Requires an .xls or .csv input file
- Input parameters include:
 - Match type (e-Product code, SFX ID, title of Work)
 - All 48 Verde acquisition fields
- Default values may be set:
 - Acquisition Start and End dates
 - Acquisition Status
 - Acquisition Renewal Type
 - Vendor, etc..

Task properties

Update database:

Input file: File Location on server Browse...

Parameters for New Acquisition

Default start date:

Default end date:

Default acquisition status:

Default subscription type:

Default vendor: ...

Default auto renewal: Yes No

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License Loader

- Creates license records
- Requires an .xls or .csv input file
- Input parameters include:
 - Match type (e-Product code, SFX ID, title of Work)
 - All 110 Verde license fields
- Default values may be set:
 - License start and end dates
 - License status
 - Licensee/Licensor
 - Renewal type

Task properties

Update database:

Input file: File Location on server Browse...

Parameters for new license

Default Start Date:

Default End Date:

Default License Status:

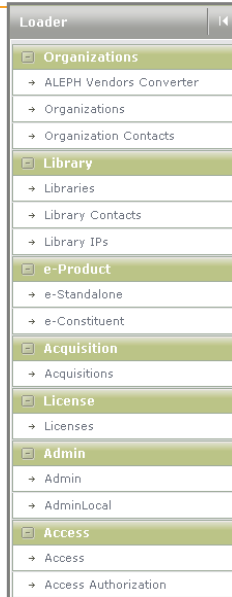
Default Licensee: ...

Default Licensor: ...

Default Renewal Type:

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And many others...



More Loader details are found in Staff User documentation:

- Field names
- Lengths, etc.

Next: Scheduling and viewing output



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Training Agenda

- **KB Tools**
 - 1) Reports
 - 2) Tasks
 - 3) Loaders
 - 4) **Scheduling and Customizing Output**
 - Running and Scheduling
 - View Scheduled Jobs and Output
 - Output Customization

Let's see how it looks

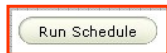


Running and Scheduling

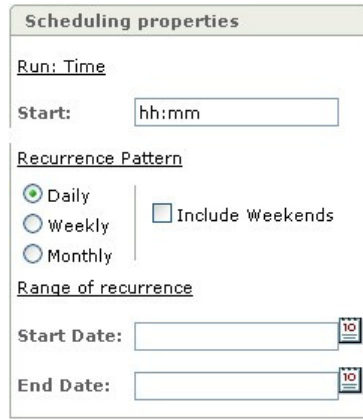
- All reports and tasks can be run immediately or be scheduled





- Run manually



- Schedule a job to run automatically

A dialog box titled "Scheduling properties" with the following fields:

- Run: Time**
Start:
- Recurrence Pattern**
 Daily Include Weekends
 Weekly
 Monthly
- Range of recurrence**
Start Date: 
End Date: 



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View Scheduled Jobs

- Use **Select a tool** menu > View Scheduled Tasks to:
 - View, edit or delete scheduled jobs

The interface for the Verde Job scheduler. It includes a search bar with "Search by: Creator:" and a dropdown menu showing "Administrator". A "Find" button is next to it. Below is a table with columns: Name, Process, Next job, Creator, Instance, Recurrence, and Actions.

Name	Process	Next job	Creator	Instance	Recurrence	Actions
	EPackageWithAcquisitionsReport	25/06/06	Administrator	TST	WEEKLY	 
	EProductsUsageStatisticsReport	10/07/06	Administrator	TST	MONTHLY	 
	EProductsLocally CreatedReport	25/06/06	Administrator	TST	WEEKLY	 

- An administrator can access other users' jobs and filter the list according to job creator



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Output Options

When a job is run or scheduled, the user can choose:

- The file format of the results
- An email address for notification when a job completes
- Use the locally formatted output
- Give a report a particular name

Delivery properties	
File format:	CSV
Email:	
Locally defined output:	Verde format
Report name:	

View Output

- View in same area as tools are run

Select a tool: View Report Output

Report	Report date	Report name	Report summary	Report file	Report status
E-Product → General Report of e-Products → Report of e-Products by Selection Status → Report on e-Packages with Acquisitions → Report on Locally Created e-Products → Report on e-Products with Usage Statistics → Report on Active e-Products without Licenses	03 Apr 2007 14:00		EProductSelectionStatusReport/1/VET...	EProductSelectionStatusReport/1/VET...	Completed

Summary file

```
File Edit Format View Help
PARAMETERS IN USE
-----
Include Constituents: true
Sort by: TITLE

Filters on active e-products records: false
e-Product status: PROD
Selection status: PA_APPROVED
Filters on active acquisitions records: false
Acquisition status: ACTIVE
Filters on active licenses records: false
License status: APPROVED

Running mode: Online

SUMMARY
-----
Start date: Fri Oct 13 14:04:33 CDT 2006
End date: Fri Oct 13 14:04:49 CDT 2006
Elapsed time: 0 days, 0 hours, 0 min, 15 sec
-----
Instance: INST2
-----
Input: 1
Match: 1
```

View Output

- View in same area as tools are run

The screenshot shows the 'View Report Output' tool interface. A dropdown menu is set to 'View Report Output'. Below it, a report summary table is visible:

Report	Report date	Report name	Report summary	Report file	Report status
E-Product	03 Apr 2007 14:00	EProductSelectionStatusReport/1/VET...	EProductSelectionStatusReport/1/VET...	EProductSelectionStatusReport/1/VET...	Completed

The 'Output file' section displays a table with the following data:

A	B	C	D	E	
1	e-Product type	e-Product title	e-Product code	Work expression code	Instance
2	e-Package	CSA BioOne	CEP_1123334168869_611411	CWE_1123334168869_611410	INST1
3	e-Constituent	Journal of the Society for Industrial and Applied Mathematics	CEP_1123335139947_657165	CWE_1123330336872_325199	INST1
4	e-Constituent	SIAM NEWS	CEP_1123337876751_806833	CWE_1123328129023_139248	INST1
5	e-Constituent	Journal of the Society for Industrial and Applied Mathematics	CEP_1123338947719_865780	CWE_1123330336872_325199	INST1
6					
7	e-Interface	oded1	LEP_1124800880996_6	LWE_1124800875078_5	INST1
8	e-Interface	The Amix Interface	LEP_1124963786457_8	LWE_1124963783619_7	INST1
9	e-Standalone	QA Main Title4	LEP_1124969767238_16	LWE_1124969738717_15	INST1

The ExLibris Verde logo is located in the bottom right corner of the slide.

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Output Customization

- Customizable elements of KB Tools output:
 - Fields included in the output
 - Order in which fields appear
 - Column names
 - Report header

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Training Agenda

- **KB Tools**
 - 1) **Reports**
 - 2) **Tasks**
 - 3) **Loaders**
 - 4) **Scheduling and Customizing Output**

Summary - KB Tools in Verde

- Reports, Tasks, Loaders
 - run immediately or schedule for regular processing
 - output via email or in KB Tools
 - tasks can run in report mode
 - adjust the outcome by specifying input parameters
 - customized output
 - more to come



Time for practice

Exercises

- ***KnowledgeBase Tools***
 - Reports
 - Scheduling

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Thank You!



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