

E-Resource Workflows

Can Alma manage electronic resources through all stages of their lifecycle?

Alma is a unified platform and handles resources of all types, regardless of format. This means that much of the functionality for e-resource management uses the same workflows as the physical resource management, allowing for consistent training, reporting, and a platform for workflow enhancements that applies to resources of any type.

Alma’s workflows support streamlining a variety of purchasing models for electronic journals and electronic books, including:

- Individual title subscriptions;
- Individual title purchases;
- Full collection subscriptions;
- “Selective” (partial) collection subscriptions; and
- Patron-driven acquisition of e-books.

A Central KnowledgeBase (CKB) managed, maintained and updated by Ex Libris, tracks the most up-to-date vendor offerings in the shared data services environment. When acquiring a new collection, libraries may search the CKB and, when they find the collection they wish to acquire, initiate an acquisition workflow based on either the full collection or a selective subset of titles they’ve licensed from the vendor. The workflow may begin with a trial, pass through purchasing, and ultimately end up in activating the resource for all users.

Search for and Order an Electronic Resource:

The screenshot shows a search result card for 'Barriers to Riches [electronic resource]'. The card includes a small image, a title, and several metadata fields: Identifier: 0-262-16193-1, Imprint: Cambridge, MA, USA, MIT Press, 20000701, Medium Type: [electronic resource], Type: Book, Language: English, and Record number: (PQKB)10181760. At the top right of the card, there are two buttons: 'Order' (highlighted with a red box) and 'Portfolio List'. Below the card, there is a link for 'Electronic (1)' and a link for 'Other details'.

Based on agreements with the vendor, once the order has been sent, the library will be able to activate the e-resource. Staff members activate new electronic resource material in the system using a wizard from the Activation Task List.

Here, a staff member performs various activities related to activating the resource, including verification that the resource is available (using Alma’s embedded Link Resolver functionality), determination of the specific contents and coverage of the resource, and then making it available for discovery by the end user.

MMS ID	Title	Type	Status	Status Date	Modified By	Identifier	Due Date	Expected Activation Date	PO Line Owner	Order Line
1	99152210500121 Gale Cengage Nursing Resource Center	Aggreg... package	Check Access	06/06/2017	System	-	07/25/2017	06/2...	Main Library	POL-45842
2	War history of American railroads,	Portfolio	Check Access	09/29/2013	System	-	-	-	Main Library	POL-29510

Electronic Collection Description | General Information | Additional Information | Notes | Group Settings | History

Summary and Inventory Information

Electronic Collection type: **Aggregator package** | Interface Name: **Galegroup**

Interface Description | Services: -

Process type: **Acquisition**

Access type: Current Perpetual

Acquisitions and License Information

PO Line: **POL-45848** | PO Line details: **POL-45848**

Activation date: - | Expected activation date: -

License: **Gale** | View license details: [Gale](#)

Once activated, descriptive metadata (bibliographic records) for the titles will automatically be added to the local catalog. Additionally, link resolution is built in; Alma will respond to any requests from discovery environments, with a menu with links to full text for all resources types: print, electronic and digital.

When a subscription is nearing conclusion, Alma will prompt staff to initiate an evaluation process for the collection. In the evaluation function, staff may view information about usage, cost, and how the collection has changed, in order to decide whether to renew or cancel the subscription. Cancellation will automatically remove the descriptive records from the catalog.

How does Alma manage e-resource workflow-related tasks, and how users are alerted to tasks relevant for them?

Alma supports the assignment of tasks to staff members as well as communication and notifications to users. A staff user will be able to see tasks related to their roles and authorizations in the Tasks widget on the Alma dashboard:

Tasks

- 31 Purchase Requests
- 388 Order Lines
- 22 Invoices
- 24 Items
- 6 Electronic Resources
- 2 Activation - assigned to you
- 1 Activation - unassigned
- 2 Activation - passed due date - assigned to you
- 1 Activation - passed due date - unassigned
- 10 Trials

Tasks are automatically generated by Alma as an output of various workflows within the system. For example, when a subscription for an e-resource is recorded (ordered), Alma will automatically generate an activation task for the item. Initially the task will have an 'unassigned' status. When an authorized user starts working on the task, the task will automatically

move from 'Unassigned to the 'My Tasks' tab of the user.

Subject to roles assigned within Alma, Managers can assign tasks to a staff member, review lists of tasks assigned to others for completion or delay. If necessary, tasks can be reassigned to another team member.

#	Title	Type	Status	Order Line	Rush	Interested Users	Notes
1	Alexander Street Press Education in Video	Selective package	Activate the resource	POL-46111			
2	Power Electronics in Renewable Energy Systems and Smart Grid: Technology and Applications	Book	Check Access	POL-60452			
3	West Southwest : Vertebrate Life in Southern California	Book	Check Access	POL-60412			
4	Journal of ornithology of N. America.	Portfolio	Check Access	POL-60373			
5	Journal of ornithology of S. America.	Portfolio	Check Access	POL-60371			
6	Journal of Journal of ornithology of Europe.	Portfolio	Check Access	POL-60354			
7	Design ProFILES	Database	Check Access	POL-46374			
8	Films on Demand	Database	Check Access	POL-46371			

What is the workflow for central negotiations?

If a consortia chooses to manage central negotiations, the following should be set up/configured:

- Content (collection & portfolios) should be managed *centrally* on behalf of members
- Institutions for which the content was negotiated for should be listed *centrally*
- Negotiated cost-per-member should be managed *centrally*
- License terms should be managed *centrally*
- Activation of content should be done *centrally* on behalf of members
- Acquisition – order, fund, invoices should be managed by every individual member *locally*

Member Name	Price	Currency	Start date	End date	Order Status	Notes
1 Training - Member 1	Clean 25	USD				

Staff will be able to see a 'combined' view of member and Shared (Network Zone):

Rank	Title	Medium Type	Language
1	Science. Journal By American Association for the Advancement of Science. (New York, N.Y.: publisher not identified Vol. 1, no. 1 (July 3, 1880)-v. 3, no. 82 (Mar. 4, 1882); [New ser.] vol. 1, no. 1 (Feb. 9, 1883)-v. 23, no. 581 (Mar. 23, 1894); [2nd ser.] v. 1, no. 1 (Jan. 4, 1893). Subject: Science--Periodicals. Sciences--Périodiques. Natuurwetenschappen, and others	Electronic (2)	eng
2	Science [electronic resource] / Steve Fuller. Book By Fuller, Steve, (Durham : Acumen c2010.) Subject: Science--Social aspects. Religion and science. Electronic books.	Medium Type: [electronic resource] From Network	eng

How can CKB resources be localized?

CKB electronic resources can be localized to reflect institution-specific information such as administrative/access information, coverage information for electronic journal titles, public notes, etc. Note how the library can override parser information, define a proxy, and so forth.

Activation Information | Service Description | Linking Information | Portfolios | Notes | Group Settings | History

Parser: Gale::OpenURL
Parser (override): \$\$LOC_ID \$\$SNO_ART \$\$ART

Parser parameters: url= http://find.galegroup.com/openurl/openurl&dbase=CDB &loc_id=\$\$LOC_ID &art=\$\$ART &url2=http://link.galegroup.com/apps/pub

Link Resolver Plugin: -

URL type: Dynamic URL Parser Parameters


Parser parameters (override):

Can staff or patrons be notified when a collection has been activated?

A tab in the PO line allows for the listing of interested users to be notified when the order is complete (e.g. items received, or resource activated).

How can individual titles in a collection be managed and edited?

Alma provides the flexibility to manage work with electronic portfolios on an individual level or as part of a collection. This section describes modifying a portfolio that is part of a collection using the Electronic Service Editor:

2  **Gale Cengage Contemporary Women's Issues** Edit Collection Edit Service ...

Type: Aggregator package Orders: 1

Services: Full Text (Not Available)

Interface Name: Galegroup

Linking Level: Database






Creation Date: 2017-06-07 16:39:44

Modification Date: 2017-06-07 16:39:44

Process type: Acquisition

Available For Other details

Status: All CZ Linking: All

Availability	ID	Title	Coverage	Material Type
<input type="checkbox"/>	 0026-8275	Modern plastics.	Available from 2001 until 2001.	JOURNAL
<input type="checkbox"/>	 0025-1895	Management review.	Available from 1996 until 1998.	JOURNAL
<input type="checkbox"/>	 0893-2522	Dealernews.	Available from 2000 until 2000.	NEWSPAPER
<input type="checkbox"/>	 1077-6591	The Harvard gay & lesbian review.	Available from 1994 until 1999.	JOURNAL
<input type="checkbox"/>	 0896-9329	Credit card management.	Available from 2002 until 2002.	JOURNAL

General Information | Linking Information | Coverage Information | Acquisition Information | Notes

Which coverage statement will be applied? Only local Global and local Global or local Only global

Global Date Information

From Year	From Month	From Day	From Volume	From Issue	Until Year
2000	-	-	-	-	2005

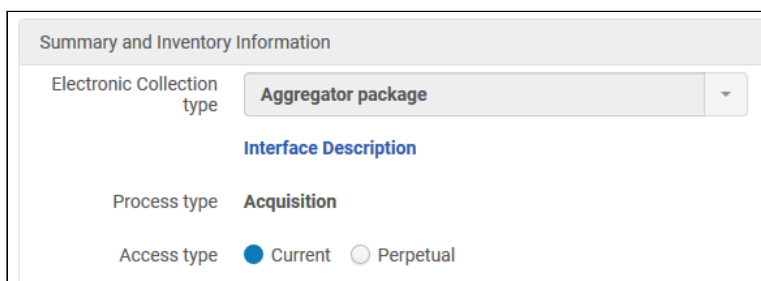
The Electronic Collection Editor contains the total number of portfolios and how many of the portfolios are active. Additionally, the editor provides active from/until dates by service type. From here, staff users can perform global changes:

- Remove local coverage

- Set a proxy
- Update URLs (such as removing the EZproxy prefix, for example)
- Associate portfolios with a license
- Activate/deactivate portfolios
- Delete portfolios (with the appropriate permissions).

Can perpetual access rights for both individual titles and collections be recorded?

A collection includes an Access Type field, indicating the access level (perpetual/current). This allows tracking the details of the perpetual access even when the material is passed from one publisher to another.



Summary and Inventory Information

Electronic Collection type: Aggregator package

Interface Description: Acquisition

Process type: Acquisition

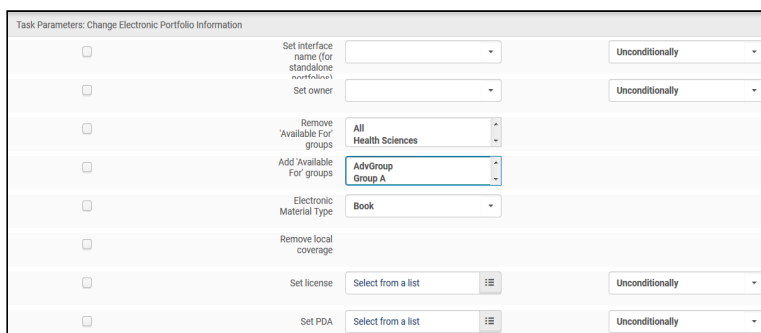
Access type: Current Perpetual

Alma supports the recording of current and perpetual access. A collection can be activated twice for the same institution: one with the content representing the perpetual access titles and one representing the current subscription titles.

Is there an option for globally updating e-resources?

Edit section

Global corrections to e-resources can be done via the Portfolio update batch process, which enables performing global changes on a defined set of records. The screen capture below is an illustration of the elements that can be changed:



Task Parameters: Change Electronic Portfolio Information

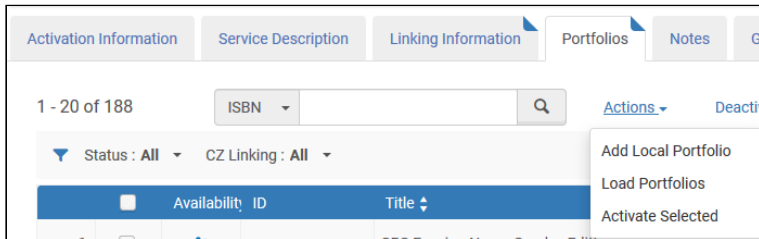
<input type="checkbox"/>	Set interface name (for standalone portfolios)		Unconditionally
<input type="checkbox"/>	Set owner		Unconditionally
<input type="checkbox"/>	Remove 'Available For' groups	All Health Sciences	
<input type="checkbox"/>	Add 'Available For' groups	AdvGroup Group A	
<input type="checkbox"/>	Electronic Material Type	Book	
<input type="checkbox"/>	Remove local coverage		
<input type="checkbox"/>	Set license	Select from a list	Unconditionally
<input type="checkbox"/>	Set PDA	Select from a list	Unconditionally

Can staff add local collections?

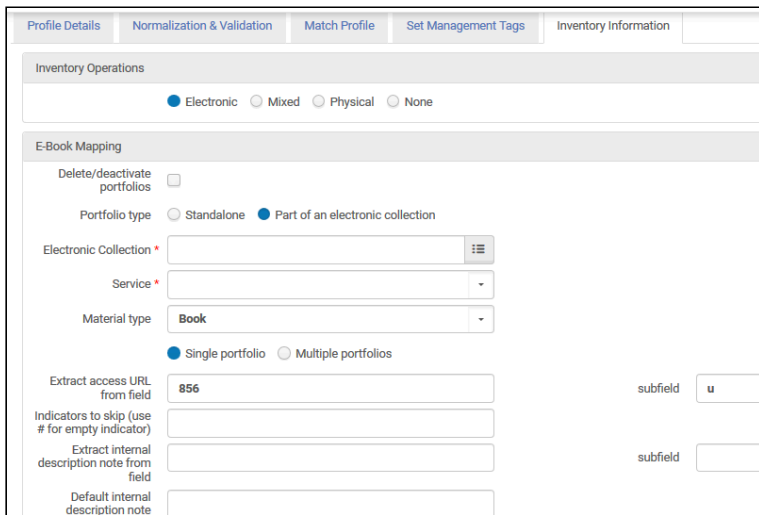
Edit section

Electronic resources of any type (Database, Interface, Collection, Titles) can be locally created in the institution.

From the Alma Menu, staff users can choose different options to create local inventory:

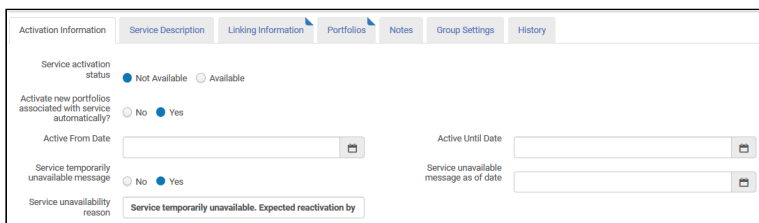


Alma supports enriching the title information with complete descriptive records using MARC-based imports, as illustrated below:



Can Primo be updated to reflect temporary unavailability of a resource?

Information for display in Primo can be customized if, for example, it is “currently unavailable”.



The ‘Service unavailability reason’ can be seen in Primo:



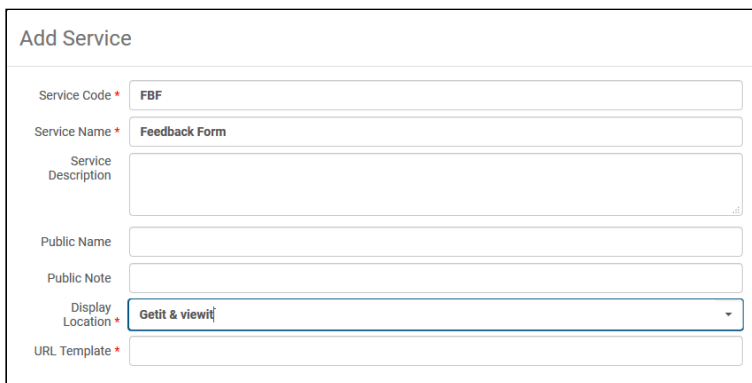
Does Alma's e-resource management support a feedback option for patrons or staff?

Patron feedback/support requests can be integrated directly into the Primo interface by creating a proprietary service for retrieving feedback information using the general electronic service functionality in Alma:



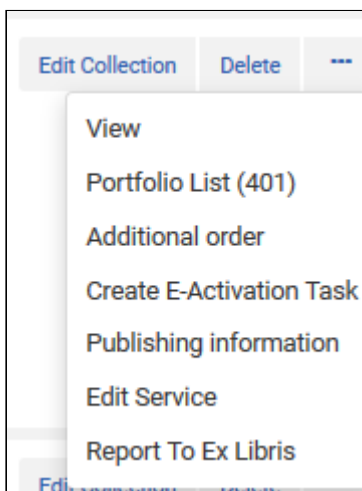
The screenshot shows a web page for an article titled "Nash's beautiful mind pre-empted million-dollar puzzle" from New Scientist, 2012, Vol.213(2853), pp.4-5. The page includes a "Report problems" button. Below the button is a form with the following fields: "Write Comment:" (a large text area), "Name:" (a text box), "Email:" (a text box), and a "Send form" button. The form is titled "Please report any problem you encounter. This helps us provide the best service for you." and includes a link to "operations and service blog".

Defining the Service form:



The screenshot shows the "Add Service" form in Alma. The form includes the following fields: "Service Code" (value: FBF), "Service Name" (value: Feedback Form), "Service Description" (empty), "Public Name" (empty), "Public Note" (empty), "Display Location" (value: Getit & viewit), and "URL Template" (empty).

It is also possible to report an issue related to collections and portfolios to Ex Libris directly from the Alma interface. This is achieved by clicking on the "Report to Ex Libris" link from repository results screen for the e-resource:



The screenshot shows a dropdown menu for an e-resource. The menu items are: "View", "Portfolio List (401)", "Additional order", "Create E-Activation Task", "Publishing information", "Edit Service", and "Report To Ex Libris". The "Report To Ex Libris" link is highlighted.

Can collections and all associated data be exported?

Export jobs are supported for the following records:

- Physical Items
- Physical Items for Labels
- Inventory Records
- Electronic Portfolios
- Bibliographic Records
- Authority Records

These jobs are accessed by selecting Administration > Manage Jobs and Sets> Run A Job. From this page, users can find the export jobs by narrowing down the type to Export:



Name	Description	Content Type	Type
1 <input type="radio"/> Export URLs	Export URLs of bibliographic records / electronic resources / digital titles	Versatile	Export
2 <input type="radio"/> Export Physical Items Labels	Export physical items labels for printing	Physical Item	Export
3 <input type="radio"/> Export Physical Items	Export Physical Items	Physical Item	Export
4 <input type="radio"/> Export Electronic Portfolios	Export active electronic portfolios information	Portfolio	Export
5 <input type="radio"/> Export Digital Titles	Export Digital Records	Digital title	Export
6 <input type="radio"/> Export Bibliographic Records	Export set of Bibliographic Records	Bibliographic title	Export
7 <input type="radio"/> Export Authority records	Export set of local authority records	Authority MMS	Export

The job wizard provides the possibility to set parameters, including the format, depending on the resource type:

Task Parameters: Export Electronic Portfolios

Physical format	<input type="text" value="Look-up or select"/>
Number of records in file	Google Scholar XML schema
Export into folder	KBART schema
FTP configuration	TXT schema
Sub-directory (Path relative to ftp configuration)	<input type="text"/>
Add interface name	<input type="checkbox"/>

In addition to the export jobs described above, Alma menus that contain lists have a Tools button which enables staff users to export lists to Excel spreadsheets. You can therefore download to Excel a list of portfolios linked to a collection. Note the option to download current - i.e. the list on the screen or extended - i.e. the full result list:

Material Type: Book		Excel
1	 <p>Gerontologic Nursing [electronic resource]. Identifier: 0-323-06999-1 Imprint: London ; Elsevier Health Sciences, 2013.</p> <p>Electronic (1) Other details</p>	<p>Order Portfolio List --</p> <p>Medium Type: [electronic resource]. Type: Book Language: English Record number: (EBL)2072026</p>
2	 <p>Forensic Nursing [electronic resource]. Identifier: 0-8493-3540-X Imprint: Hoboken ; Taylor and Francis, 2006.</p> <p>Electronic (1) Other details</p>	<p>Order Portfolio List --</p> <p>Orders: 1</p> <p>Medium Type: [electronic resource]. Type: Book Language: English Record number: (OCoLC)85784008</p>

Total views:

7498