

CARLI E-Resources Management Committee

FY 2024 Annual Report

Members:

Robin Hofstetter	2023-2026	Roosevelt University
Elizabeth Hollendonner	2022-2024	Millikin University
Andrea Imre	2022-2024	Southern Illinois University Carbondale
Elizabeth Nelson	2022-2025	McHenry County College
Jennifer Patterson	2023-2026	Elmhurst University
Sara Rizzo	2022-2025	National Louis University
Megan Ruenz	2022-2024	Wheaton College
Lisa Wallis	2022-2025	Northeastern Illinois University

CARLI Staff Liaisons:

Denise Green, Marisa Tolbert

Charge: The E-Resources Management Committee will advise on the whole life cycle of electronic resources from acquisitions and cataloging, to selecting how/what to add to Alma/PVE, activating, proxy issues, OpenAthens authentication, gathering usage statistics to help libraries know what and how material is being used, to deactivation/deaccession.

Meetings: The committee, demonstrating its flexibility and commitment, met monthly on Zoom on varying days and times based on members' availability.

Activity Highlights:

1. OCLC WorldShare Collection Manager and Alma – The bulk of the committee work this year focused on the relationship between OCLC holdings using WorldShare Collection Manager and Alma Electronic Resources Management. WorldShare Collection Manager is a tool that allows libraries to connect users with electronic content, but the holdings can sometimes get out of sync, and libraries find requests for items they do not own. OCLC Data Sync allows for the synchronization of location holdings. The committee worked to identify problem areas and ensure libraries understand the relationships between the OCLC products and Alma. Ted Schwitzner and Denise Green led a presentation illustrating the relationships between Alma and OCLC Data Sync. This presentation included managing errors in the sync based on records in the Alma Community Zone (CZ) that don't always have OCLC numbers or mismatches, where reports can be found in Alma, how to turn off holdings in OCLC WorldShare Collection Manager, and reclamation projects. Millikin University and Northeastern Illinois signed up for case studies for OCLC Data Sync. Denise Green and colleagues at CARLI are

working on documentation for the CARLI site, including a concept map of the relationships between OCLC products and Alma.

2. EBSCOhost User Interface 2024 and EBSCOhost Experience Manager – CARLI hosted multiple web demos, as all libraries are encouraged to migrate to the new interface in the summer of 2024. Feedback to EBSCO included concerns about multiple clicks, questions about any necessary authentication changes, and the possibility of screen reader trouble. By the May 2024 committee meeting, three-member institutions from ERMC had made the switch without complications. The largest hurdles are adjusting to the new interface and updating documentation.
3. I-Share display logic rules for Alma Network Zone (NZ): Standardizing NZ display logic for Primo to reduce and prioritize resources was explored and discussed. ExLibris documentation states that NZ display logic rules override Institution Zone (IZ) display logic if the institution has the same collection active in both zones. This discussion is ongoing and no current changes were made as some member institutions have complicated display logic. The full description of electronic collections managed by CARLI and the support of the NZ is documented on the CARLI site.
https://www.carli.illinois.edu/i-share/electronic-res-man/carli_nz_collections

Future Plans:

1. The committee is invested in monitoring news about upcoming browser changes and authentication and how to get ahead of the changes to assist libraries with any necessary transition. Due to privacy settings in browsers such as Google Chrome, this could impact all libraries using IP authentication with hide IP feature, removing link decoration, and third-party cookie tracking.
2. The OCLC WorldShare Collection Manager and Alma are still evolving, and the CARLI site documentation is in the works.
3. Hosting a webinar on adding license information to Alma was discussed early on in the FY24 year but didn't gain traction. However, it could potentially be a topic for the committee's future.

Acknowledgments:

We thank the members, including Elizabeth Hollendonner, Andrea Imre, and Megan Ruenz, for completing their terms this year. Elizabeth Nelson and Jennifer Patterson will step up as Co-Chairs for FY25. We express continued thanks to CARLI for the support through this committee.

Respectfully submitted by the E-Resources Management Committee, May 2024.