

## CARLI event notes from Managing E-Resources: Advanced Knowledge Days Session. June 29, 2021

CARLI: Trial process (in Alma) was pretty neat. Nice to encourage a more formal trial processes. Set up your own survey questions and target patrons.  
it's a nice feature. Could limit the trial to a specific group.

Q: I think the survey feature of the trials looks like a useful feature. Has anyone used it yet?

Q: I'm intrigued by the trials as shown today. Also by the ability to create sets of patrons (in relation to liaison areas).

Q: I wish the trials thing didn't require using Acquisitions... :)

Q: I was thinking the same thing.

Q: I kind of see the point of creating the POL if you will buy the resource, but not if you have to delete it and create a new POL anyway...

CARLI: If you are going to use this PO for the trial, and decide to purchase, you can use this PO.

CARLI: Some years you may get a trial for a month or more, then find the cost, put it in next year's budget. You have the PO to track the activity this year.

Q: I have a question about delete vs deactivate of bibs

A: Yes, ....seems like a waste to keep a bunch of deactivated portfolios and a suppressed bib....how much info could you need from it that would make it worth saving?

A: I agree that was unclear in the presentation.

CARLI: We were confused too. Our mantra is if you aren't using it, delete it. Something Kevin said was unclear.

CARLI: I think that he excluded Analytics. He was thinking about the statistics you get in Alma, not Analytics. But Analytics still contains the data when you delete. Need to test where the SUSHI data lives.

CARLI: It's better to delete the portfolios and bib records if you aren't using it. You can transfer the PO to a new item. Only reason for keeping that info if you need to export local customizations to portfolios.

A: Found this in the Harvard wiki the other day: Deleting Bib Records

A deleted record will be removed from Alma entirely. However, it will continue to be present in Alma Analytics, for audit trail/lifecycle reporting purposes.

The deletion of holdings and bibs for withdrawn resources is especially important in Alma. Otherwise, the resources are assumed to be parts of the collection that need to be managed. System functions for managing the collection continue to apply to suppressed records - such as authority control processes - using up valuable staff time for manual review of jobs and server processing time and space.

CARLI: we got used to suppressing things in Voyager because they were gone forever, but in Alma, Analytics retains the record.

CARLI: If you don't delete, the portfolio might be still searchable and displaying in PrimoVE with no linking.

Q: Showed activating proxy at Collection, I thought that wasn't correct?

CARLI: The place to activate the proxy is the Electronic Services Editor. For free or open access resources, you don't need to worry about the proxy.

Q: I am curious about the electronic collection comparison. He went so fast and I was trying to follow along.

Q: I know that the overlap and collection analysis job doesn't cover the NZ (that was my question in chat near the end)... is there any way to do that in Analytics at present?

CARLI: We are working with Ex Libris on collection level overlap and have some ideas about title level overlap as well. That kind of analysis may be done in the NZ analytics environment in order to accurately compare collections and titles between NZ and IZ.

CARLI: not to say that you can't get analysis on the titles through your own IZ, but we're still learning how to do that, so asking CARLI to go through the NZ is better for now.

Q: Say we wanted to compare EBSCO and ProQuest academic ebook collection. I thought that you could use the overlap analysis but he went fast.

CARLI: Demo. Need to explicitly select a collection to compare.

CARLI: Source collection should be in your IZ, but the target can be in the CZ.

CARLI: Demo of completed report. You can compare to something in the CZ or overlap of two collections in the IZ.

Q: So if we wanted to compare an institution zone collection to something we have through the network zone (such as Masterfile Premier) couldn't we just use the Community Zone record for the collection with my IZ collection. In other words, use the CZ record for Masterfile Premier with my IZ copy of Gale General OneFile, for example?

CARLI: it would work if it was a collection that CARLI has activated. Comparisons with Oxford would be a problem because it's only a limited set that is activated.

CARLI: when I was starting the example analysis, the NZ icon was active.

Q: Has anyone used/looked into the Inventory Management Groups and patron access? It seems like something that might be useful for us for law-only databases (Westlaw, etc.).

CARLI: CARLI has used Inventory Management Groups. What this does it allows us to provide cataloging centrally and appear in your IZ as if you had cataloged it yourself. Where it gets trickier is at the IZ level. Your institution must have campuses with a distinct set of IP addresses or be able to identify the users for a particular campus. As far as I know, no one has created campuses, so no one has poked at this functionality. Have not really delved into the options.

CARLI: typically the scenario of a separate law library is one that Ex Libris uses.

A: I'm at NIU, and the Law Library is a separate Library, but not a separate Campus. I'm not sure about our IP addresses. Thanks!

CARLI: whether it's useful or not depends on whether you bought a resource for the whole institution or a smaller group.

A: Alternatively, openathens does allow for provisioning of resources to specific groups as well

A: IIT has at this point just adopted public notes for collection that are limited to law. It's sometimes frustrating for non-law students.