Making lemonade out of lemons - Alma's Electronic Resource Activation Task List

ANDREA IMRE, SOUTHERN ILLINOIS UNIVERSITY CARBONDALE

CARLI OPEN OFFICE HOURS PRESENTATION

NOVEMBER 10, 2022

Where is the Lemon?

▶ **Resources menu → Manage Inventory section → Manage Electronic Resource Activation**

▶ When a new POL is created for an e-resource, Alma automatically populates the task list and adds the resource to the Activation Task List.

▶ Typically you activate a resource, verify access, and then remove a resource from the task list by selecting Done using the ellipses.

▶ Small technical services departments are less likely to find this Alma feature valuable than larger ones.

Default settings in Alma

Configuration → Resources → General → E Task Statuses

Resources are added to the Task list based on Alma's default settings

Electronic Resource Activation Task List

Assigned to Me | **Unassigned** | Assigned to Others

1 - 20 of 575 | PO Line ▾ | 🔍 | Change Status ▾

🔻 Status: **Opened Tasks** ▾ | PO Line Owner: **All** ▾ | Expected Activation Date : **All** ▾ | Filter orders with interested users : **No** ▾ | Clear all

	☐ MMS ID	▲ Title	⇕ Type	Status	⇕ Status Date	Modified By	⇕ Identifier	⇕ Due Date	Expected Activation Date	Rush	Interested Users	Notes	
1	☐ 99201156712005897	ABI/INFORM global	Portfolio	Localize	07/08/...	System	-	08/07/2021	07/08/2021				...
2	☐ 99296184512005897	Academic Video Online	Database	CheckAccess	02/12/...	676363...👤	-	03/14/2021	-			✓	...
3	☐ 99296184512005897	Academic Video Online	Database	CheckAccess	02/12/...	System	-	03/14/2021	01/01/2021				...
4	☐ 99494894004005897	Academic Video Online: Premium - United States	Aggrega... package	Localize	07/01/...	676363...👤	-	07/31/2022	01/01/2021			✓	...
5	☐ 99261162212005897	Accessible Archives Complete	Database	CheckAccess	04/09/...	System	-	05/09/2021	06/16/2021				...
6	☐ 99174244012005897	AccessMedicine /	Database	Localize	07/01/...	System	-	07/31/2022	11/07/2022				...
7	☐ 99174244012005897	AccessMedicine /	Book	Localize	08/05/...	674495...👤	-	09/04/2022	-			✓	...
8	☐ 99291651412005897	Access Physiotherapy	Other Visual Material	CheckAccess	05/05/...	676363...👤	-	06/04/2021	-			✓	...
9	☐ 99235784712005897	Accounting horizons	Journal	Localize	08/08/...	676363...👤	0888-7993	09/07/2022	-			✓	...

Make Lemonade out of Lemons

Customize Task Statuses to improve your workflows. Examples:

- ▶ Title(s) to be cancelled for next subscription year
- ▶ Upcoming publisher changes
- ▶ Upcoming platform changes
- ▶ Upcoming title changes
- ▶ Upcoming content changes in packages (e.g., eDuke, Project Muse)
- ▶ Resources that require manual harvesting of usage stats
- ▶ Problematic titles where access needs to be checked periodically

Customizing E Task statuses

Manually add portfolios or collections to your Activation Task List

Customize task status and add notes

Manually add a collection

Customize task status and add notes

Alma generates an email notice to the user assigned to the activation task

Sat 10/22/2022 3:06 AM

Y

Your.Department@organization.com

Notify E-Activation due

To ● Imre, Andrea

ℹ If there are problems with how this message is displayed, click here to view it in a web browser.

[EXTERNAL EMAIL ALERT]: Verify sender before opening links or attachments.

SIU Southern Illinois University

CARBONDALE

Notify E-Activation due   10/22/2022

You have been assigned to the following Electronic resource activation tasks that their Due date has passed :

E-Tasks List :

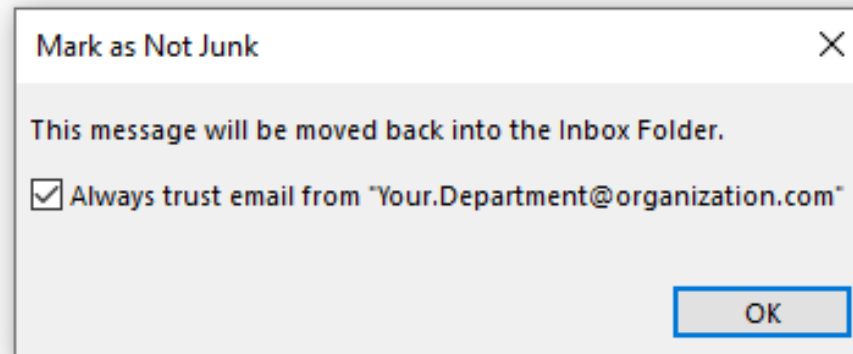| Title	Identifier	Due Date
AP stylebook.		10/21/2022

Sincerely

Your Department

Southern Illinois University Carbondale (SIC) —Carbondale, IL

Check your Spam/Junk Folder and change settings as needed

Our current task list

Electronic Resource Activation Task List

	MMS ID	Title	Type	Status	Status Date	Modified By	Identifier	Due Date	Expected Activation Date	PO Line Owner	Order Line	Notes	
		package								Library		✓	
4	99317461582205889	The Neuroscience of Addiction	Streami… Video	Other	11/01/2022	SIU8504801…	-	11/28/2022	-	-	-	✓	…
5	99317262939105889	Synthetic Reaction Updates	Database	Other	08/05/2022	SIU8500978…	-	12/01/2022	-	Morris Library	237512-sicdb	✓	…
6	99317298296505889	American literary scholarship.	Journal	Other	08/01/2022	SIU8504801…	0065-9142	12/01/2022	-	-	-	✓	…
7	0	Digital Theatre Plus	Selective package	Test access	11/04/2022	SIU8504801…	-	12/04/2022	11/04/2022	Morris Library	POL-10241	✓	…
8	99317434288605889	Journal of financial crime.	Journal	Other	10/15/2021	SIU8504801…	1359-0790	12/06/2022	-	-	-	✓	…
9	99317457272605889	China Data Online	Database	Other	11/07/2022	SIU8504801…	-	12/07/2022	-	-	-	✓	…
10	99317239203205889	Plant Management Network	Selective package	Other	10/07/2021	SIU8504801…	-	12/16/2022	-	Morris Library	227203-sicdb	✓	…
11	99317496094305889	Radiographics.	Journal	Other	09/26/2022	SIU8504801…	0271-5333	12/22/2022	-	-	-	✓	…
12	99317282091905889	Journal of applied microbiology.	Journal	Publisher change	08/15/2022	SIU8500978…	1364-5072	01/01/2023	11/04/2022	Morris Library	259321-sicdb	✓	…
13	99317285760105889	Letters in applied microbiology.	Journal	Publisher change	08/15/2022	SIU8500978…	0266-8254	01/01/2023	11/04/2022	Morris Library	178117-sicdb	✓	…
14	99317313306305889	Evolution : international journal of organic evolution.	Journal	Publisher change	08/15/2022	SIU8500978…	0014-3820	01/01/2023	11/04/2022	Morris Library	POL-1740	✓	…
15	99317282832705889	Journal of the Royal Statistical Society.	Journal	Publisher change	08/15/2022	SIU8500978…	1369-7412	01/01/2023	11/04/2022	Morris Library	184775-sicdb	✓	…
16	99317259305105889	The American journal of	Journal	Publisher change	09/01…	0002-9165	01/01/2023	10/28/2022	Morris	144500-sicdb	✓	…

1 of 3

Ex Libris documentation

- https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/015Managing_Electronic_Resources/Activating_Electronic_Resources_and_Activation_Task_List

- https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/050Configuring_General_Alma_Functions/070Configuring_Alma_Letters - under Alma Letters → Notify E-Activation due Letter

- https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/060Configuring_Other_Settings - under Other Settings → activation_due

Questions?

Andrea Imre

aimre@lib.siu.edu