

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

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CARLI OPEN OFFICE HOURS PRESENTATION

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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

Alma Sandbox Code Table Save

E Activation Task Status i >

Values Notes

Import + Add Row ↻

	Move Up	Move Down	Code	Description	Default Value	Updated By	Last Updated	
1		▼	Activate1	Localize	<input checked="" type="radio"/>	exL_impl	10/11/2019	...
2	▲	▼	Proxy	Proxy	<input type="radio"/>	exL_impl	10/11/2019	...
3	▲	▼	Test	Test Access	<input type="radio"/>	exL_impl	10/11/2019	...
4	▲	▼	Activate2	Make Available	<input type="radio"/>	exL_impl	10/11/2019	...
5	▲		PCI	Central Discovery Index	<input type="radio"/>	exL_impl	10/17/2019	...

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 ▼

<input type="checkbox"/>	MMS ID	Title	Type	Status	Status Date	Modified By	Identifier	Due Date	Expected Activation Date	Rush	Interested Users	Notes	<input type="button" value="⋮"/>
<input type="checkbox"/>	99201156712005897	ABI/INFORM global	Portfolio	Localize	07/08/...	System	-	08/07/2021	07/08/2021				<input type="button" value="⋮"/>
<input type="checkbox"/>	99296184512005897	Academic Video Online	Database	CheckAccess	02/12/...	676363...	-	03/14/2021	-			✓	<input type="button" value="⋮"/>
<input type="checkbox"/>	99296184512005897	Academic Video Online	Database	CheckAccess	02/12/...	System	-	03/14/2021	01/01/2021				<input type="button" value="⋮"/>
<input type="checkbox"/>	99494894004005897	Academic Video Online: Premium - United States	Aggrega... package	Localize	07/01/...	676363...	-	07/31/2022	01/01/2021			✓	<input type="button" value="⋮"/>
<input type="checkbox"/>	99261162212005897	Accessible Archives Complete	Database	CheckAccess	04/09/...	System	-	05/09/2021	06/16/2021				<input type="button" value="⋮"/>
<input type="checkbox"/>	99174244012005897	AccessMedicine /	Database	Localize	07/01/...	System	-	07/31/2022	11/07/2022				<input type="button" value="⋮"/>
<input type="checkbox"/>	99174244012005897	AccessMedicine /	Book	Localize	08/05/...	674495...	-	09/04/2022	-			✓	<input type="button" value="⋮"/>
<input type="checkbox"/>	99291651412005897	Access Physiotherapy	Other Visual Material	CheckAccess	05/05/...	676363...	-	06/04/2021	-			✓	<input type="button" value="⋮"/>
<input type="checkbox"/>	99235784712005897	Accounting horizons	Journal	Localize	08/08/...	676363...	0888-7993	09/07/2022	-			✓	<input type="button" value="⋮"/>

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

Code Table

Save

E Activation Task Status



Values

Notes

Import

+ Add Row



	Move Up	Move Down	Code	Description	Default Value	Updated By	Last Updated	
1		▼	2023 cancel	2023 cancelled journal	<input type="radio"/>	[REDACTED]	11/07/2022	⋮
2	▲	▼	usage	Harvest usage manually	<input type="radio"/>	[REDACTED]	11/07/2022	⋮
3	▲	▼	Other	Other	<input type="radio"/>	[REDACTED]	11/07/2022	⋮ Delete
4	▲	▼	Activate1	Order modified	<input checked="" type="radio"/>	[REDACTED]	11/07/2022	⋮
5	▲	▼	migration	Platform migration	<input type="radio"/>	[REDACTED]	11/07/2022	⋮
6	▲	▼	Publisher change	Publisher change	<input type="radio"/>	[REDACTED]	11/07/2022	⋮
7	▲	▼	Test	Test access	<input type="radio"/>	[REDACTED]	11/07/2022	⋮
8	▲	▼	Title change	Title change	<input type="radio"/>	[REDACTED]	11/07/2022	⋮
9	▲		cancelled journal	2022 cancelled journal	<input type="radio"/>	[REDACTED]	11/07/2022	⋮

Manually add portfolios or collections to your Activation Task List

The screenshot displays a web application interface for managing electronic portfolios. The top navigation bar includes a search bar with the text 'Electronic portfolios', a dropdown menu for 'Title', and the current selection 'Journal of applied microbiology'. Below the navigation bar, there are several tabs: 'Import (Resources)', 'Manage Import Profiles (Resources)', 'Add Local Electronic Collection', 'Configure Views', 'Manage Sets', 'Run a Job', 'Monitor Jobs', and 'Community Zone Updates Task List'. The main content area is titled 'Electronic Portfolios (1 - 4 of 4) | Journal of applied microbiology' and features a 'Save Query' button. The interface is divided into a left sidebar with 'Facets' and a main content area. The 'Facets' sidebar includes sections for 'Type' (Selective package (4)), 'Electronic Collection Content Type' (Journal Package (4)), 'Service' (Full Text (4)), 'Electronic Material Type' (Journal (4)), and 'Availability (Electronic Portfolio)' (Available (4)). The main content area shows a list of portfolios, with the first entry 'Journal of applied microbiology' selected. This entry includes details such as 'Wiley Online Library (Wiley Online Library All Journals): getFullTxt', 'ISSN: 1365-2672', 'Available from 1997.', 'Access Type: Current', 'Electronic Material Type: Journal', 'Creation Date: 06/08/2020 11:47 AM, CDT', 'Modification Date: 11/04/2022 9:45 AM, CDT', 'Electronic collection COUNTER Platform: wiley_online_library', 'Peer Reviewed', 'Portfolio ID: 53207253670005889', 'Service ID: 62197530290005889', 'Collection ID: 61197524790005889', 'MMS ID: 99317282091905889', and 'Electronic collection management level: Ex Libris'. A context menu is open over the entry, listing actions: 'Edit Portfolio', 'View', 'Create E-Activation Task' (highlighted with a red box), 'Test access', 'Delete', 'Move', 'Report To Ex Libris', 'Deactivate', and 'Display in Discovery'. The 'Additional order' and 'Resource sharing request' buttons are also visible.

Customize task status and add notes

Alma Production

E-Activation Task Details Cancel Save

Summary Attachments Notes

Title Journal of applied microbiology. i

Status Date 08/15/2022

Status Publisher change

Due Date 01/01/2023 X 📅

Acquisitions

Resources

Discovery

Fulfillment

Admin

E-Activation Task Details Cancel Save

Summary Attachments Notes

1 - 1 of 1 Created by 🔍

+ Add Note 📄 ⚙️

Created On	Updated On	Updated By	Note	
1 08/15/2...	08/18/2...	Mills, Kymberlee 📄	8/15/22 - per EBSCOnet, publisher change from Wiley to Oxford University Press effective 12/31/22.	⋮

Manually add a collection

The screenshot displays the Alma interface for managing electronic collections. The top navigation bar includes search and navigation icons, and the breadcrumb trail shows the current path: **Electronic collection** > **Electronic Collection N...** > **sage**. Below the navigation bar, a menu contains options like **Import (Resources)**, **Manage Import Profiles (Resources)**, **Add Local Electronic Collection**, **Manage Sets**, **Run a Job**, and **Monitor Jobs**.

The main content area is titled **Electronic Collections (1 - 2 of 2)** and shows a list of collections. The selected collection is **Sage (SAGE Complete)**. The details for this collection are as follows:

- Type:** Selective package
- Collection ID:** 6119752588000588
- Services:** Full Text (Available)
- MMS ID:** 9931723917650588
- Interface name:** SAGE
- Linking Level:** Article
- Management level in Community Zone:** Ex Libris
- Creation Date:** 04/19/2015 7:00 PM, CDT
- Modification Date:** 11/08/2022 6:32 AM, CST
- Provider coverage:** Yes
- Search Rights in CDI:** Free
- Full Text Rights in CDI:** Subscription (Linkresolver)
- Full Text Linking in CDI:** Linkresolver
- CDI Type:** Full Text Collection
- Do not show as Full Text available in CDI even if active in Alma:** No

On the right side of the collection details, a context menu is open, listing various actions. The **Create E-Activation Task** option is highlighted with a red box. Other visible options include **Descriptive Record**, **Delete**, **View**, **Order**, **Publishing information**, **Edit Service**, **Edit Full Text Portfolios**, **Report To Ex Libris**, and **Add Reminder**.

Customize task status and add notes

< E-Activation Task Details

Cancel

Save

Summary

Attachments

Notes

Title Sage

Status Date 11/10/2022

Status Harvest usage manually

Due Date 12/15/2022



< E-Activation Task Details

Cancel

Save

Summary

Attachments

Notes

1 - 1 of 1

Created by



+ Add Note



Created On	Updated On	Updated By	Note
1 11/10/2022	11/10/2022	Imre, Andrea	Reharvest usage for Sept-Oct. from Sage 11/10/22: Please note, SAGE Journals platform COUNTER reports for September and October 2022 are currently under-reporting PDF article usage. This began after launching our redesign in mid-September, meaning that any reports you have pulled for September or October are inaccurate, showing figures lower than the true usage. We apologize for the inconvenience, and we are working hard to correct this as soon as possible. We expect to have fully corrected data in December, however if you need a report sooner, please contact Onlinesupport@sagepub.co.uk , to request an updated report.

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



Sat 10/22/2022 3:06 AM

Your.Department@organization.com

Notify E-Activation due

To ● Imre, Andrea

[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.



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 :

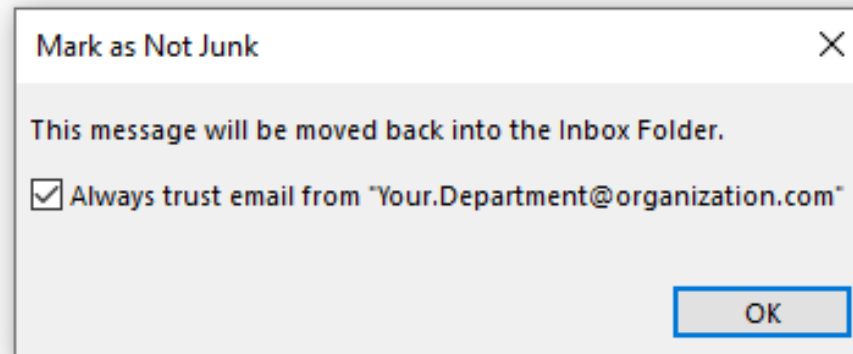
Title	Identifier	Due Date
AP stylebook.		10/21/2022

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

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

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)/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](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](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?

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