

## CARLI event notes from Managing E-Resources: The Basics Knowledge Days Session. June 8, 2021

[https://knowledge.exlibrisgroup.com/Cross-Product/Conferences\\_and\\_Seminars/Knowledge\\_Days\\_-\\_ELUNA/2021\\_Knowledge\\_Days](https://knowledge.exlibrisgroup.com/Cross-Product/Conferences_and_Seminars/Knowledge_Days_-_ELUNA/2021_Knowledge_Days) - Exercises on this page

In Alma, the Help > Help for this page option is very useful to get you directly to the Ex Libris documentation for the page that you are on in Alma.

Q: We asked about this specifically. It seems that he said to put proxy yes for Collection AND proxy yes at Service Full text level. We (perhaps mistakenly) thought it should be on Service level only, not both. If not a database, I mean. Service for electronic collections (aggregator or selective) control delivery of the inventory. The collection contains the services and the CDI activation.

A: Proxy at both collection and service level -- don't hurt, but must be at service level and pointed at preferred proxy.

Exceptions for collection level- may help in multicampus type cases when e-collection Z only for campus2 proxy, etc.

Q: Is Open Athens proxy a replacement for Alma proxy?

A: Change Alma default to Open Athens Proxy. Then use default proxy.

Q: when you order something and two different departments order -- can you save and order later, and if you activate, can you order later?

A: Can click order even though already active. License is optional. Material provider can be different from access provider, such as paying CARLI for a resource. For access provider, edit the vendor and click the check box.

Q follow-up: I fill out the first three screens and then click Save, but I want to activate the e-resource. Now in review status and assigned to other user. Edit collection and go through steps to activate. Add full text service. Jen will poke at it more. Might be better to activate the collection and then order it. Is that the same for e-books? Yes.

Q: How is everyone else handling subscriptions like films on demand where the CDI records are minimal. Just manually importing records?

- MIL - At Millikin, we have Swank films and with those our cataloger brings in the OCLC record and uses our permalink in the local field, so it is a local bib.
- Jen: my impression is that most are bringing in OCLC records and localizing the collection
- ONU: when missing we put in tickets asking them to add (for example, to the Salem books e collections) and after about a month they do add them
- Jen: not sure of the details, but I think you may be able to use an OCLC Knowledge Base collection and activate it to use a profile to load it?
- NLU: the subscription package changes over time as well which causes issues
- Jen: can ask the TechServ-ig list! Have heard of libraries doing local management but including a public access note that says when access will end in case they don't get them removed right away

- Jen and Denise: Films on Demand CZ collection does have poor metadata, so maybe are using local collection. Might try searching Alma email list: <https://el-una.org/about/mailling-lists/alma-mailling-lists/> Must be subscribed to search the archive!

Q: Just curious do a lot of you do the cataloging changes for eresources or do you send them to another department?

A: Might be another question for the email list.

Q: Are we legally allowed to send Marc records from different vendors to ExLibris?

A: It depends on your contract with the vendor.

Jen copied the chat from the session and will include it in the materials for the session. (see below)

Q: Proquest Theses and Dissertations - how do people find things in it in Primo VE? It is not full text. It can be hard to troubleshoot.

A: If you activate it, it provides the abstracting and indexing to allow users to find things in it. Denise does demo in ARU which has this activated. Notes the user would probably need to Expand the results in Primo VE (because the default is usually full-text owned by the institution) and then filter to type Dissertations. Jen points out that you can use the Permalink to see where the record is coming from. Can always send example to CARLI Support if you can't figure it out.

## Questions and Answers from Managing E-Resources: The Basics Knowledge Days Session – June 8, 2021

Answers provided by Ex Libris Staff

Q: I assume the ordering and paying can happen before the activation?

A: yes, ordering and payment can be done independently of activation

Q: that search for "databases" brought up a full text collection in the first result.....no?

A: the search was for inventory type of electronic collections, so yes it came up with an electronic collection that is part of the larger CZ database of resources.

Q: The presenter says "databases" do not have full text (they are only A&I), yet the search results show "full text service" on the results that came up

A: It is possible to add a full-text service to a database type collection but it is not the recommended workflow. The environment being used is a sandbox and it's possible there is an anomaly used for testing.

Q: If we know that ExLibris is working to make CZ records for a vendor's collection, how do we check on the progress of that? Or about how long would that take? If a new title that is available on a publisher's website but hasn't shown up in \*months\* in the CZ, what is the best way to address that?

A: to submit a request for resources to be added to the Community Zone, please submit to the Content section of the Ideas Exchange. <https://ideas.exlibrisgroup.com/forums/574345-content>

Q: "Update CZ bib records copied into your IZ": will those updates not be overwritten when the CZ portfolios are updated from the vendor in the CZ?

A: You can add local extensions to CZ bibliographic records in the IZ. It is also possible to localize ONLY bibliographic records linked to CZ resources

from Amanda Schriver to everyone: 10:24 AM

Q: Are all records in CZ are vendor records? Are any OCLC records brought in?

A: Resources in the CZ can come directly from vendors or can be managed locally by Ex Libris's Data Services Team. No records come directly from OCLC to the CZ.

Q: are publishers in charge of updating their collections in the CZ and getting the records to Ex Libris though?

A: Not all publishers are responsible for their collections in the CZ. Ex Libris is working on a partnership with vendors to allow them to directly manage their CZ collections and resources but it is not yet live. If interested, you can find information by searching "Provider Zone" on the Developers Network website.

Q: The goal of the CZ save librarians' time. However, the quality of descriptive metadata records are poor, very often. How do you improve the quality of the records in the Alma CZ? For examples: Science Direct 2021 subject selective collections. The records (99.9%) from those collections are super brief without any authors' names, descriptions, and subject headings.

A: while our data services team works to update and improve records, it is possible to contribute higher quality records to the Community Zone -

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/Electronic\\_Resource\\_Management/030\\_Working\\_with\\_Local\\_Electronic\\_Resources/070Contributing\\_to\\_the\\_Community\\_Zone\\_%E2%80%93\\_Bibliographic\\_Records](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/070Contributing_to_the_Community_Zone_%E2%80%93_Bibliographic_Records)

Q: Where can we learn more about licenses and building them? Are they necessary for the ordering?

A: licenses are not required for orders. The OLH contains instructions on how to add a license  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/020Acquisitions/090Acquisitions\\_Infrastructure/050Managing\\_Licenses\\_and\\_Amendments](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/090Acquisitions_Infrastructure/050Managing_Licenses_and_Amendments)

Training for adding license in Alma:

[https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma\\_Essentials\\_-\\_English/I\\_Acquisitions\\_Infrastructure/D\\_Licenses](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/I_Acquisitions_Infrastructure/D_Licenses)

Q: What if is not something that we are buying but just adding a new edition that was added by the vendor to a subscription that is already paid?

Q: this sounds like the library would have purchased an aggregator collection. In that case, you could indicate to Alma to automatically add new portfolios to the collection as the vendor information is added to the CZ. The order is for the collection as a whole so no order is necessary for the portfolio.

Q: Can we just skip the PO process and just activate the portfolio?

A: Yes, it is possible to activate electronic resources without going through the order process.

from Knowledge Delivery to everyone: 10:34 AM

You can find documentation and training videos about acquisitions side by side on our Alma LibGuide:  
<https://exlibris.libguides.com/alma/acquisitions>

Q: Is there a benefit to going through the order process?

A: Ordering is valuable to the overall budget tracking for the library and the ordering process will localize the inventory and create an e-activation task for the library to use to track activation and access to new resources.

Q: "it is possible to contribute higher quality records to the Community Zone" -- Very often, we do not have time to that. Can we submit a SF to improve the quality of a collection?

A: You would submit this kind of request through the Ideas Exchange content area

Q: If we have already activated electronic collections in Alma but want to start using the order process, should we go back and submit orders for our activated collections?

A: For continuing resources that need to be renewed, you will want to create an order so you can renew and track it in Alma. One-time orders would not require an order but they could be recreated if desired.

Q: Do you have to wait to do orders within the FY or does it just have to be set up and you choose?

A: Best practice in Alma is to have only one active fiscal period but if multiple are open you can choose the fiscal year to create the order in.

Q: So Amanda where are the instructions for creating an order that has already been activated?

A: you can create an order for an already activated resource you will just follow the standard ordering process.

Q: What about portfolios that are in the CZ but not combined into one collection there?

A: You can manually associate a resource with a PO Line. This may be the best method for this scenario if they will remain separate in the CZ.

Q: If you chose Main Library, will the other branches not be able to view the collection?

A: No, it will be available to all patrons. The PO Line itself is just managed by that library.

Q: For a consortium, would a Local collection that is subscribed to by several libraries be created in the NZ and the holdings/items go in the IZ?

A: Unless the collection is ordered and paid for by the consortium at the Network level, a local collection should be created in the IZ.

Q: Could I have a local electronic collection with CZ portfolios activated from different CZ collections?

A: No, this is not possible due to the different nature of linking between CZ collections and vendors.

Q: Sorry still trying to wrap my brain around the putting in an order for an activated collection. If we are renewing a product and it happens July 1, should I do it now and will it come up for renewal in the new FY?

A: Create the order now with the subscription date start on 7/1/21-6/30/22. the line will come up for renewal next year.

Q: Can you add a standalone to a CZ collection?

A: if a portfolio is in a collection it is not a standalone portfolio. You can add local portfolios within CZ collections.

Q: In the 2021 Alma CKB Release Notes Jan-May

[https://knowledge.exlibrisgroup.com/Alma/Content\\_Corner/Release\\_Notes/2021\\_Alma\\_CKB\\_Release\\_Notes\\_January\\_-\\_May](https://knowledge.exlibrisgroup.com/Alma/Content_Corner/Release_Notes/2021_Alma_CKB_Release_Notes_January_-_May) there was a note that the Oxford University Press Journals: was to be withdrawn on May 31st. This is the collection we use in our IZ. Will this withdrawal have any impact on access to our portfolios (access to journals and articles in Primo)? Do we need to update what collection we are using in the IZ?

A: Please see documentation on the Community Zone Updates Task List under "Electronic Collection service deleted" The resource will become local and you can manage it as a local electronic collection.

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/Electronic\\_Resource\\_Management/020\\_Working\\_with\\_Community\\_Zone\\_Electronic\\_Resources/030Working\\_with\\_the\\_Community\\_Zone\\_Updates\\_Task\\_List#Actions\\_on\\_a\\_Collection\\_Following\\_a\\_Community\\_Zone\\_Update](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/020_Working_with_Community_Zone_Electronic_Resources/030Working_with_the_Community_Zone_Updates_Task_List#Actions_on_a_Collection_Following_a_Community_Zone_Update)

Q: In an IZ that is using Distributed Access (Inventory Management Groups): When ordering the same collection from CZ for different libraries which do not have the same subscription (different portfolios)... What procedure should be taken? Creating more copies of the same CZ collection?

A: Yes, if different inventory groups have access to different portfolios in a collection, multiple CZ collections will likely be the easiest way to manage this.

Q: When you use the renewal future (manual) do you still have to activate it every year or does it just stay activated?

A: It will stay activated.

Q: Can you activate before POL is completed or do you have to wait for that part of the workflow?

A: Activation can be managed separately from the ordering process.

Q: When would we keep an electronic portfolio standalone vs. adding a portfolio to a collection?

A: If there are multiple portfolios from the same collection, it is recommended to put them in a collection as it makes it easier to manage them but it is up to the library policy on handling this.

Q: Why are there two places to activate the proxy? Does one effect on campus vs off?

A: You can activate proxy at the service level (for all the portfolios underneath it). You can activate proxy at the collection level which would be the case for a database type resource.

Q: When you manually renew in the future, do you go through the same ordering process?

A: No, you simply select "Renew" in the order.

Q: What do we do with activation tasks that were incorrectly created because the CZ records were not selected? In this case, we want to activate the CZ record instead of whatever placeholder was found in IZ or NZ.

A: You can delete activation tasks -

[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#Managing\\_Electronic\\_Resource\\_Activation](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#Managing_Electronic_Resource_Activation)

Q: Would you really activate at Colecction level AND the Service level? We were led to believe only at Service level UNLESS it was a database with no portfolios. Is that not correct?

A: Service for electronic collections (aggregator or selective) control delivery of the inventory. The collection contains the services and the CDI activation...

Q: From answer A: Activation can be managed separately from the ordering process. So I can order - save it and leave for another department to process/fill out and then go back to the same search/collection and activate it? They will still be tied together because I'm choosing the same record?

A: Yes.

Q: So, yes activate at Collection level AND Service level?

A: Yes. IF a Service is not active there is no full text delivery that can be presented to the user.

from Knowledge Delivery to everyone: 10:56 AM

The recordings, PPT, and hands-on exercise document for this, and all other Knowledge Days sessions, can be found here: [https://knowledge.exlibrisgroup.com/Cross-Product/Conferences\\_and\\_Seminars/Knowledge\\_Days\\_-\\_ELUNA/2021\\_Knowledge\\_Days](https://knowledge.exlibrisgroup.com/Cross-Product/Conferences_and_Seminars/Knowledge_Days_-_ELUNA/2021_Knowledge_Days)