E-resources 1 - Class Materials and Script

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Handouts, resources and display documents

Pre-reading and reference documents

- ERIN Application reference
- Licenses reference
- Usage Statistics in Alma reference
- Vendor Information for eResources Processes reference
- Introduction to the Community Zone pre-reading

Outline and Links to related documentation

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Script

Introduction

Welcome to eResources 1. My name is ..... and our facilitator/s in this class is/are.... .

This class covers (ADD BRIEF OVERVIEW OF CONTENTS). It builds on what you learned in Search and Sets and (OTHER PRE-REQS). As we work, you can follow along with me as I demonstrate, or wait until each practice break to try it yourself.

A few notes:

- Alma went live on July 3rd and, as expected, we're learning new things about it as staff work with real data in the system. Everyone is continuing to learn Alma, and will have the support they need to do so.

- We are training on the tool of Alma, and while there is usually more than one way to do anything in Alma, we will show you one verified or preferred way to do tasks. Once you've learned the best practice, we encourage staff to discuss local procedures and workflows in your units.
• We also encourage everyone to come together in Learning Circles - either cross-functional within units or on the same functions across units - to discuss how the implementation is going and how the new features and workflows in Alma might change work at Harvard.

• Please continue to use the LTS Alma Support form to ask questions and report issues with Alma data, workflows, or roles & permissions. Asking these questions, and working groups providing answers, is an important part of everyone learning more about Alma. You can find the link in the Notifications widget in Alma, along with the link to Alma documentation on the LTS wiki.

• You have a 1-page handout that contains a link to the Alma sandbox, the wiki page for this class, and a few other useful links. (If there are other handouts, describe them.) The script and all materials for this class are available to review on the wiki, and will continue to be updated with any changes in procedures.

Some quick logistics information:

• The nearest bathrooms & water supply are:
  • Lamont rooms: Restrooms are gendered by floor. Lamont 310 is on a men's room floor, Lamont B-30 is on a women's room floor.
  • 90 Mt Auburn: Two restrooms are on the opposite side of the building on the basement level, water is in the kitchenette and in a fountain by the restrooms
  • 625 Mass Ave: Restrooms are at the opposite end of the building on the 3rd floor, by the water fountain
• Please ask questions when they come up; I will also pause between sections for questions and to make sure things are clear.

Let's start by introducing ourselves. (Go around the room and ask everyone to share their name, library/unit, and how this class relates to their work.)

High level overview of electronic resources

• E-books and e-journals are ordered just like their print counterparts (See acquisitions training), but don't require any item or shelf prep work, hence there is no location in Alma for e-resources. Individual title purchases may start with patron requests or the work of selectors. New requests are tracked using ERIN, a workflow management tool. Because there are a lot of pieces to the workflow and certain things have to happen in a certain order, it's very helpful to track each piece and have everything documented.

• In most cases, electronic content lives at the vendor/publisher site, and we essentially lease access to that content via licenses, negotiated in the e-resources unit.

• Generally speaking we purchase Harvard-wide electronic access - authenticated use is via IP address. Off campus access goes through a proxy server, which challenges users for their Harvard credentials (e.g., Harvard Key). Alma facilitates linking via the proxy server so that anyone using Hollis from any location can access e-resources if they have a Harvard Key. We no longer create local URNs in batch or individually. A few resources require users to create an additional user account (e.g., WSJ, Financial Times).

• There are many different purchasing models for e-resources: like print materials, we create one-time or continuous orders, depending on how the resource is being sold to us. In the case of e-books, there are many different purchasing and access models. Some publishers sell individual books (often purchased via GOBI), others only sell packages of e-books which are purchased directly from the publisher. Some publishers offer frontlists, lists of books that they expect to publish in a given year. Similarly for e-journals, we can order electronic subscriptions individually via our subscription agents, or in packages, often directly from the publisher. In Alma, packages of e-books or e-journals are called Electronic Collections, and they are either selective packages or aggregator packages.

• Once purchased and available on the publisher site, e-books and e-journals must be "activated" in Alma for users to be able to find them in Hollis. There are multiple ways to activate e-resources in Alma, we would like to emphasize using the task list for this process.

• Disclaimer: there are many ways to accomplish the same task in Alma. Workflows for many of these tasks are still being developed. When in doubt about anything, ask your manager or e-resources staff.

Basic Topics

Overview of pre-Alma workflows: Aleph, SFX, Verde, ERNIE, ERIN (screenshots)

• Aleph: orders and invoices, bringing in records, creating holdings
• Verde ERM: activating resources, maintaining platform and license info
• SFX KB: activating resources & services, updating coverage, batch changes to packages, generating reports
• Ustat usage reporting
• ERIN: tracking requests, organizing workflow across units

Overview example: all the pieces from ordering through activation - what does the ideal scenario look like? Example: Ordering and activation of One-Time eBooks via GOBI : Video link and Script

• Selector selects / Patron request received
• Acq staff places order with vendor
• Acq staff creates order in Alma
• Electronic resource activated in Alma (may involve additional cataloging work, always involves linking)
• Invoice processed in Alma
The Eresource task list - when resources are ordered but not yet activated, they will appear on the Electronic Resource Activation Task List.

- From the task list, staff can test access and activate resources.
- Analogous to work orders/receiving workflow - click 'Done' or it will stay on the list. (Reference acquisitions & order maintenance classes.)
- Ex Libris is planning to enhance task list functions in a future update based on feedback from library partners.

Introduction to the Community Zone

"The Alma Community Zone (CZ) is a shared repository for all Alma users. It includes authority records, bibliographic metadata, and an electronic materials knowledge base."

Bibliographic records in the Community Zone come from a variety of sources. The sources are not all shared with customers, but we know it includes CONSER database and ebook records from many vendor sources.

In the CZ, you find "community" (all Alma customers) versions of the following:

- **Electronic Collections** - equivalent to a Verde package record or an SFX Target. Collections (with the exception of Database types) contain portfolios.
  1. **Aggregator package**: a type of electronic collection that includes all titles (Clinical Key)
  2. **Selective package**: includes only some of the collection’s titles (Stat!Ref)
  3. **Database**: type of electronic collection whose resources cannot be individually managed. Databases DO NOT contain portfolios. (e.g. World Communism: Pamphlets from McMaster University)
- **Services** - (e.g., full text or abstracts). Proxy settings for e-resource portfolios are set at the service level. Portfolios inherit linking settings from services.
- **Portfolios** - individual titles that are part of a collection. They are normally e-books or e-journals.

Portfolios are grouped/organized into collections. A collection can contain active and inactive portfolios. You can see a list of all the portfolios in a collection.

- When we bring in a record from the Community Zone, it lives in our Institution Zone but is still linked to the version in the CZ. Updates or enhancements to the records will be reflected in our IZ records.
- Example: ClinicalKey, frontlists in the CZ
- Example: Foundations for global health practice
- **Note**: How to search for a collection or database: Use "Electronic Collection / Electronic Collection Name"

Activating Journals (continuous orders) - task list

- click on task list at top right
- choose 'electronic resources activation'
- search for 'The Laryngoscope'
- from ellipsis, choose 'test access'
- from ellipsis, choose 'activate'
- from ellipsis, choose 'done'

Activating Journals (continuous orders) - alternate workflow - ADVANCED

- Example: search for 'The Laryngoscope'
- in this example, we discover that this title has moved from one platform to another, and we need to activate it on the new platform.
- find electronic version, expand portfolio list - note that Interfaces can have multiple collections (e.g., wiley)
- find inactive portfolio, click on 'view'
- in electronic portfolio editor, click 'active' radio button
- update coverage if necessary on coverage tab

Activating single Ebooks - task list

- click on task list at top right
- choose 'electronic resources activation'
- search for 'Arts Therapies in the Treatment of Depression'
- from ellipsis, choose 'test access'
- from ellipsis, choose 'activate'
- from ellipsis, choose 'done'

Activating single Ebooks - alternate workflow - ADVANCED

- Example: search for 'Arts Therapies in the Treatment of Depression' (1-315-45441-6)
- click on Portfolio List
- note proxy settings: do you need to change? (no)
- further work: Relink to another bibliographic record (advanced topic?)
• are we done?