ELUNA learns E-resource Management Session Q & A

We're new to Alma, and we're trying to verify which setting determines whether a portfolio is auto-active or non-auto-active, the Electronic Service Editor ("Activate new portfolios associated w/ service automatically?" or the CDI. We think it's the Electronic Service Editor, but it's tricky to understand which setting does what as a newbie!

Annalis and Carrie: Yes, the "Activate new portfolios associated with service automatically" setting in the Electronic Service Editor is the setting you would use to have new CZ portfolios automatically localized and activated to your IZ.

Do you have a preferred method for cleaning up portfolios that have been deactivated?

Annalis and Carrie: I personally like to download my CZUTL report and use filters to narrow things down by collection. From there, I will go into each individual collection and handle any deactivated portfolios from there. The reason I prefer to do it this way is due to the sheer size of our ebook collections. This gives me more power to see what my options are - can I reactivate the portfolios and reassociate them with the Community Zone? Do they have orders on them that I need to move? Do I need to reactivate them as Institution Zone records? I'm able to do an entire collection (if multiple portfolios in it are affected) at once this way by working in the Electronic Service Editor.

Can you put the link to the documentation in the chat?

Annalis and Carrie: If you meant the link from our slides, it is here:
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

How often do you work on the updates? We work on ours weekly but have heard of some places that do it every two weeks due to the way the resources are updated by particular providers.

Annalis and Carrie: Annalis reviews it monthly. However, other members in our consortium use weekly, monthly, quarterly, annually, or never scheduled based on their staffing availability and number of collections in their Izs in Alma. A few of them only have one or two collections in the Institution Zone because they allow the PALS office to share the state-wide databases from Network Zone managed electronic collections.

Does the consortium pull reports as well?

Annalis and Carrie: We do not pull reports regarding the CZUTL. We do pull other reports related to electronic resources.

We're new to Alma, and we're trying to verify which setting determines whether a portfolio is auto-active or non-auto-active, the Electronic Service Editor ("Activate new portfolios associated w/ service automatically?" or the CDI. We think it's the Electronic Service Editor, but it's tricky to understand which setting does what as a newbie! Related, how does the CDI tab setting ("We subscribe to only some titles in this collection" relate to the Electronic Service Editor setting?

Annalis and Carrie: Yes, the "Activate new portfolios associated with service automatically" setting in the Electronic Service Editor is the setting you would use to have new CZ portfolios automatically localized and activated to your IZ. As for the CDI tab setting "We subscribe to only some titles in this collection," that setting has nothing to do with activating portfolios that were newly added. That CDI setting relates to which CDI records will display in Primo for that collection - and whether the collection should display all of its records or only records related to the portfolios you activated.

Is there an advanced search term that helps pull a report of the non-auto active or auto active collections? Or something that shows up in Analytics?

Annalis and Carrie: There are a few options. First, you can search Electronic Portfolios or Electronic collections using an advanced search where Alma will find values where the Electronic collection > Electronic Collection Type = Selective or Aggregator Package. Then, if you've consistently set the auto-active values as Aggregator = auto and Selective = non-auto, that would let you find them that way. You can also use a basic search of Electronic collection > Electronic Collection Name = *. Then, you can use the Type facet to limit to Selective or Aggregator packages. In Analytics, the E-Inventory subject area will also let you search by Electronic Collection Type.

Does Type: Aggregator or Type: Selective have any impact on the collection being Auto-Active or Non-Auto-Active?

Annalis and Carrie: Yes. Typically, if an electronic collection is a genuine Aggregator (you get everything) package, you will want to use the settings to make the electronic service auto-activate new Community Zone portfolios in your Institution Zone. If it's a genuine Selective package (and you don't want to expose all new titles and let your patrons access them under a PDA-type program), you will use the settings to make the electronic service non-auto-active.

How do you indicate post-cancellation access in Alma? Is there a good way to consistently note these and run reports on these collections? (new to Alma - thanks!)

Annalis and Carrie: There are lots of ways to do this, but it mostly comes down to preference. We have a collection from the Community Zone for each vendor that we give a customized name to. The custom name, or Public Name (Override), will be "[VENDORNAME] PCA Rights Collection". This creates an easy way to find all of our PCA collections in Alma as all we have to do is an Electronic Collection/Name search for "PCA Rights Collection." Having a similar naming convention also makes it easier to run reports as all you have to do is include all collections with "PCA Rights Collection" in their name. If you are looking for something more Alma specific, you can indicate a collection's Access Type as current, perpetual, or current and perpetual under the General Tab in the Electronic Collection Editor for an entire collection. Similarly, you can indicate access type for individual portfolios under the general tab in the Electronic Portfolio Editor.

Wondering if there is any chance of seeing anything spoken of here in the ALMA environment?

Annalis and Carrie: Unfortunately, CZUTL can sometimes take a while to load depending on what your last searching and filtering settings were - and how many entries will be displayed. So we chose not to display it in real time. If there would have been time, we did have it pulled up to show during the Q&A. However, we ran out of time.

What is the best way to deal with a backlog of updates - oldest to newest, or newest first? And I'm talking about 2 years of updates.

Annalis and Carrie: There are a variety of approaches you can employ. Some people clear all of the information entirely with an idea that if there were problems they will be reported. Others might look at the entries using the recent or oldest methods. You could also consider the various report types and tackle those most important to you first or dismiss the ones you don't care about. You do have the option of searching the list by collection name and working with the entries by that collection or collection & report type. There are date limiters, a single field search, and some filters within CZUTL to use to only show the entries you want. Or you can take all of the entries into Excel and filter there. When done, you can Dismiss everything in CZUTL and start a regular maintenance schedule.

Do you check Primo for local info. When CZUTL doesn't state the coverage dates? If so, do you have a quick way to do that without copying & pasting?

Annalis and Carrie: If you did not add it to the Electronic Portfolio Editor > Coverage Information [tab] because you put it in a portfolio note field, you might need to check the portfolio/Primo. However, it's best practice to use the Coverage Information tab. That will allow the Alma link resolver to calculate whether you have coverage for an article from that electronic portfolio/provider. If you are just saying you do not see your Electronic Portfolio Editor > Coverage Information tab's local coverage in the list, you should click the setting/display column icon and make sure the "Local Information" is set to display.

Are there other reports that are only in the ALL tab besides Elec Portfolio Additions that you check regularly?

Annalis and Carrie: No. Only the two different report types for portfolio additions are limited to the all tab. All other report types are in both tabs.
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

How often do the CZUTL tasks run? Do you set the frequency or is that pre-determined? (migrating to Alma soon)

Annalis and Carrie: Annalis reviews it monthly. However, other members in our consortium use weekly, monthly, quarterly, annually, or never scheduled based on their staffing availability and number of collections in their Izs in Alma. A few of them only have one or two collections in the Institution Zone because they allow the PALS office to share the state-wide databases from Network Zone managed electronic collections.

How do you identify resources with post-cancellation access during CZUTL review? Just curious how you are able to prioritize these before navigating to the records in Alma.

Annalis and Carrie: When I set up our collections for PCA rights, I give those collections a custom name of "[VENDORNAME] PCA Rights Collection". This customized or public name for the PCA collections serves many purposes but specifically to answer your question, that custom collection name shows up along with the portfolio name in the CZUTL. When I download my lists for Excel, I'll filter the Electronic Collection Name column to only show me collections with PCA Rights Collection in its name. Similarly, if you prefer to work directly in Alma when looking at the CZUTL, you can search for the name of any given collection under Collection Name. This is how I am able to prioritize these records before I move on to other records.

When we are deleting a big file of portfolios, Is it possible to export the original portfolios before the deletion and upload it back if something going wrong?

Annalis and Carrie: You can download the portfolio's information in a spreadsheet from search results, a set, the Electronic Service Editor > Portfolios tab, a few more places within Alma, or via the Export Electronic Portfolios job. Then, you can import data and create portfolios from a spreadsheet or KBART file form the Electronic Service Editor > Portfolios [tab] > Load Portfolios. This Portfolio Loader functionality would require your spreadsheet have the data labeled and, in the order, specified within the documentation:
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/El ectronic_Resource_Management/030_Working_with_Local_Electronic_Resources/015Managing_Electro nic_Resources#Using_Portfolio_Loader_for_Adding.2C_Updating_or_Removing_Portfolio_Information_i n_Bulk

How often do you review the CZUTL?

Annalis and Carrie: Annalis reviews it monthly. However, other members in our consortium use weekly, monthly, quarterly, annually, or never scheduled based on their staffing availability and number of collections in their Izs in Alma. A few of them only have one or two collections in the Institution Zone because they allow the PALS office to share the state-wide databases from Network Zone managed electronic collections.

Is there a way to identify collections added to the community zone via the CZUTL?

Annalis and Carrie: No, CZUTL does not have a report type for that. You can see new collections in the Alma CKB (Community Zone) Release Notes:
https://knowledge.exlibrisgroup.com/Content/New_and_Upcoming_Collections/Alma_CKB_Release_No tes

I'm new to Alma, where can I find release notes?

Annalis and Carrie: The release notes related to CZUTL would be the Alma CKB (Community Zone) and CDI release notes:
https://knowledge.exlibrisgroup.com/Content/New_and_Upcoming_Collections/Alma_CKB_Release_No tes and

How can I access ELUNA doc repository? It asked for an account.

Laura Morse: The membership contact for your institution will have the login/password for the doc repository. But note, the volunteer crew who plans these events has not yet had time to catalog the event materials in the repository.   This will be done post-event.

Is the link checker script shareable?

Kailey Fallis: It was from 2019 but an attendee shared a similar script in the chat.

Have you had any feedback from users after deactivating CZ OA collections?

Kailey Fallis: None.

Other than "Free E-Journals", are there CZ collections or providers that you have decided to deactivate due to instability or incorrect coverage/OA? Before Alma, we had problems with some OA providers' reliability and have been cautious since then.

Kailey Fallis: There are lots. I don't have a list, but we have certainly encountered this. Our new perspective is that if it hasn't been specifically requested by staff members or is not something very important to our collection, we simply delete the e-collection if it isn't working properly. We can't be responsible for managing all of these open access collections and are concentrating our efforts on certain ones.

We are very interested in taking a similar maximalist approach for OA CDI collections and taking a collaborative approach to analyzing the collections. Would it be possible to share your data?

Kailey Fallis: Of course. Email me at kfallis@uoguelph.ca

How do you manage newly hybrid titles? A journal in Wiley or Elsevier, for example, goes partially OA.... What do you do with your subciption package portfolio?   How do you manage newly hybrid titles? A journal in Wiley or Elsevier, for example, goes partially OA.... What do you do with your subciption package portfolio? How do you manage newly hybrid titles? A journal in Wiley or Elsevier, for example, goes partially OA.... What do you do with your subciption package portfolio?

Kailey Fallis: We do not actively do work on this. We hope that those open access hybrid titles are available in another open access collection, such as the vendors OA e-collection and that we can provide access to users through that.

Why did you decide to keep the Miscellaneous free collection if the links were not working? Maybe I missed something.

Kailey Fallis: At the time, our intention was to fix the links in this collection. We didn't want to delete anything without having a look at what was actually in that collection. We had the e-collection suppressed so that users were not able to discover or try to access any broken links.

Would like to know more about How Omni avoids a duplication price in A-Z list?

Kailey Fallis: We set up the SpringShare integration enabling our a-z database list entries to appear in Primo. In order to ensure we don't have duplication for database access points, we have to suppress the database access point in Alma (suppress from discovery the bib that is connected to the e-collection.

OMNI -- what is this?

Kailey Fallis: Omni is what we call our Primo. All schools who are part of OCUL's Collaborative Futures initiative have their instances of Primo branded as Omni. You can read more about it here: https://ocul.on.ca/omni/