

Electronic Resources Management in Alma-Primo Collaborative Network

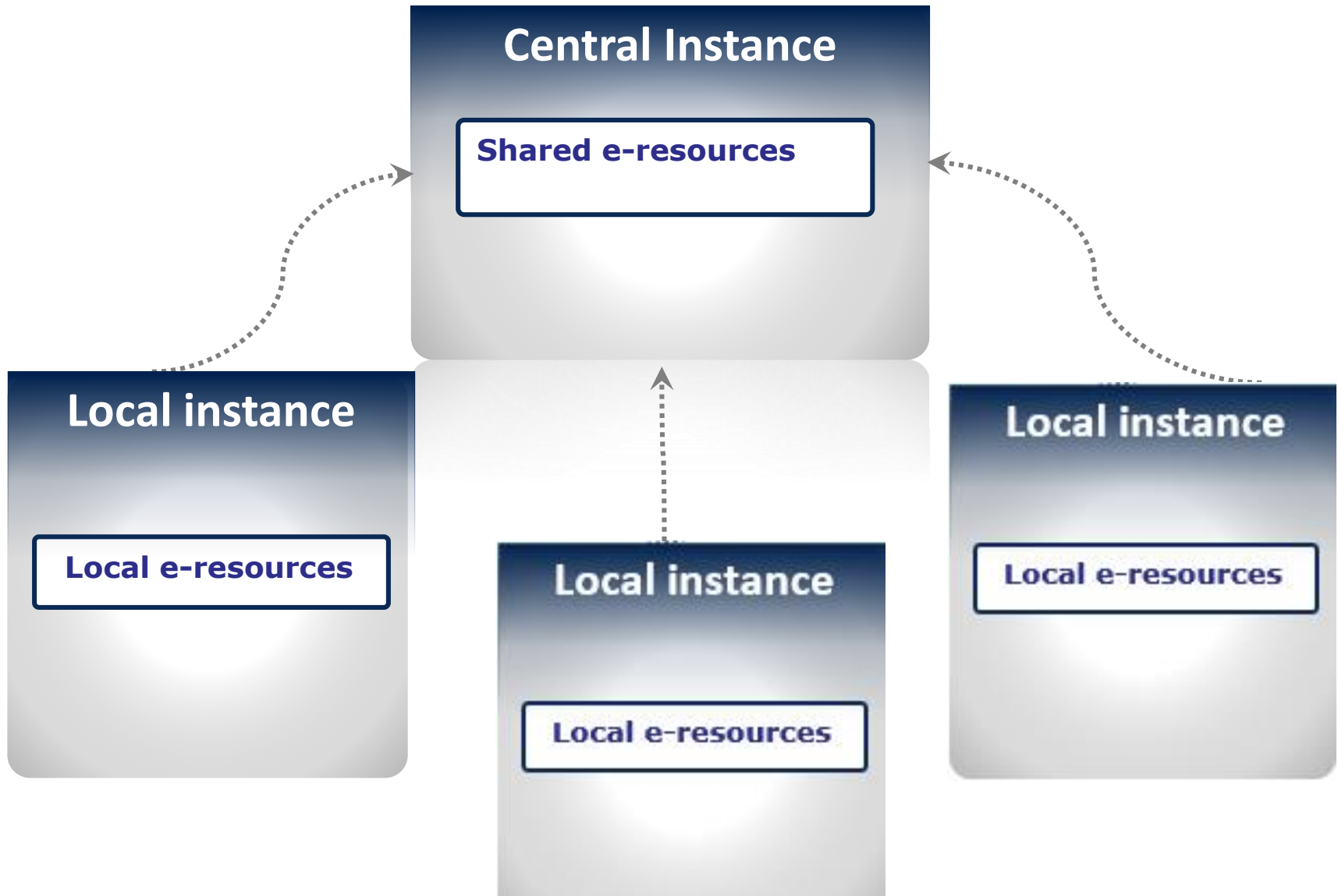
Agenda



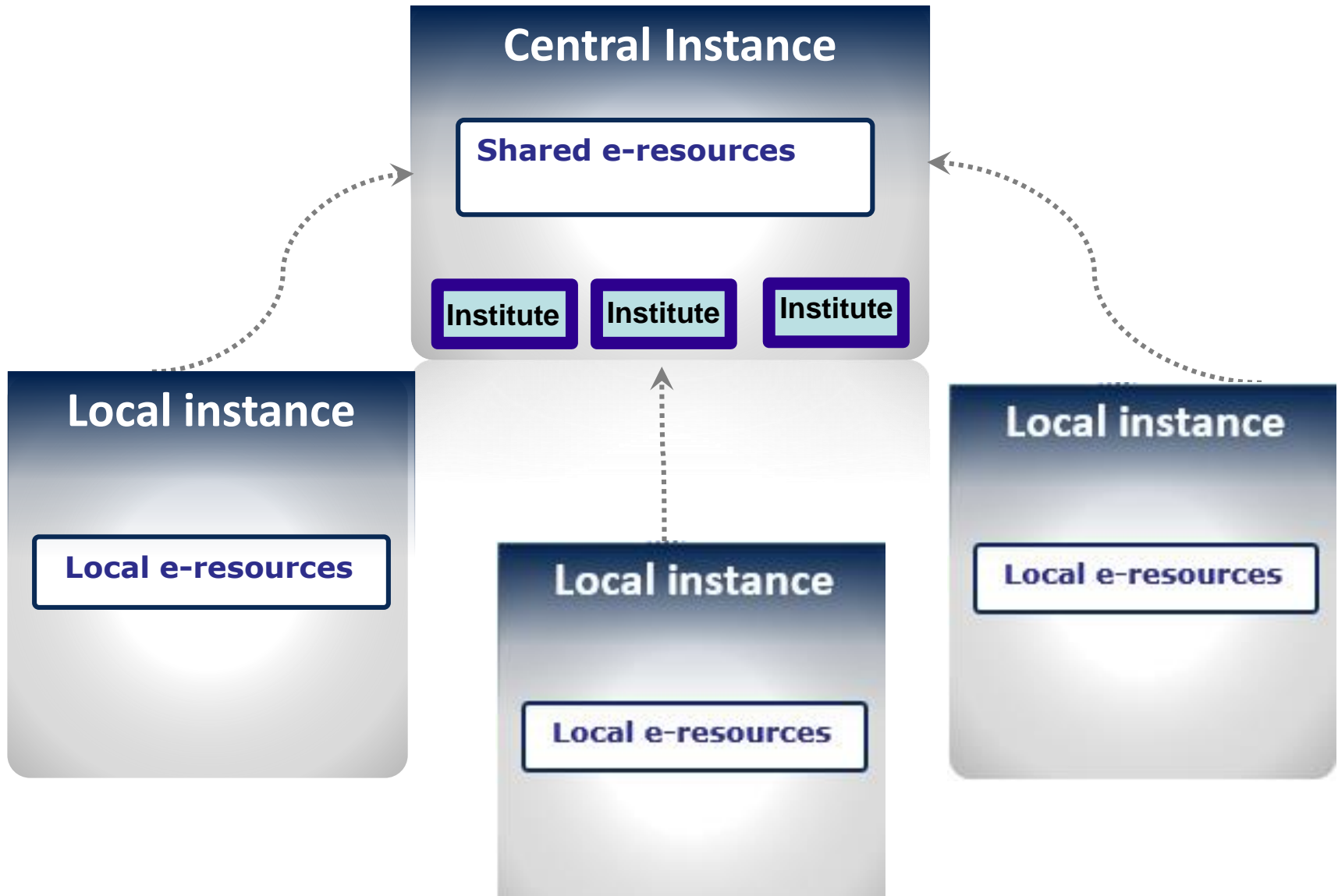
- **SFX and Alma inventory models for management of e-resources – similarities and differences**
- **Working with different data sources – added values provided by Alma**
- **Manage entire e-resource lifecycle in Alma**
- **Further Actions**

SFX and Alma Inventory Models

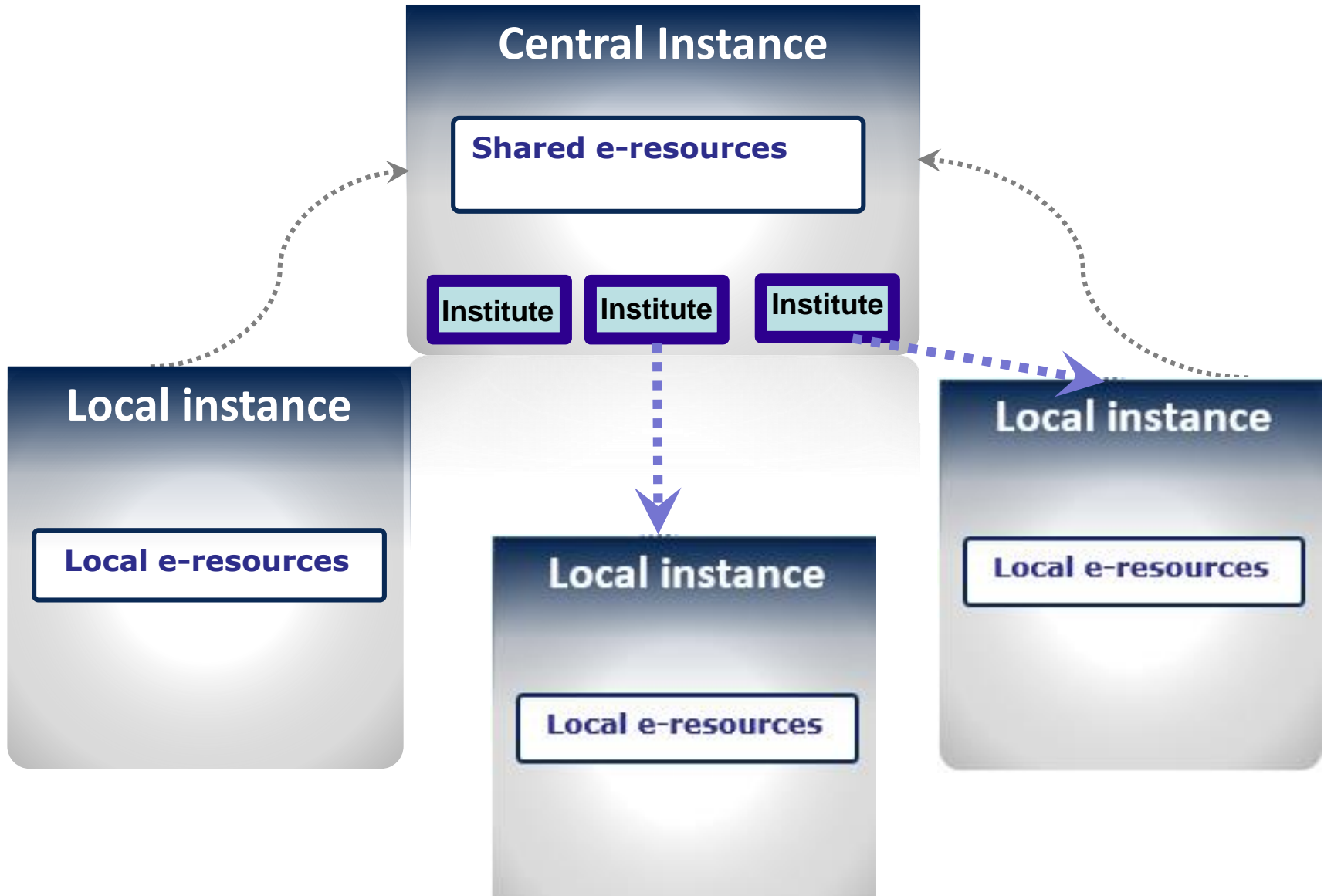
E-Resources Management in SFX



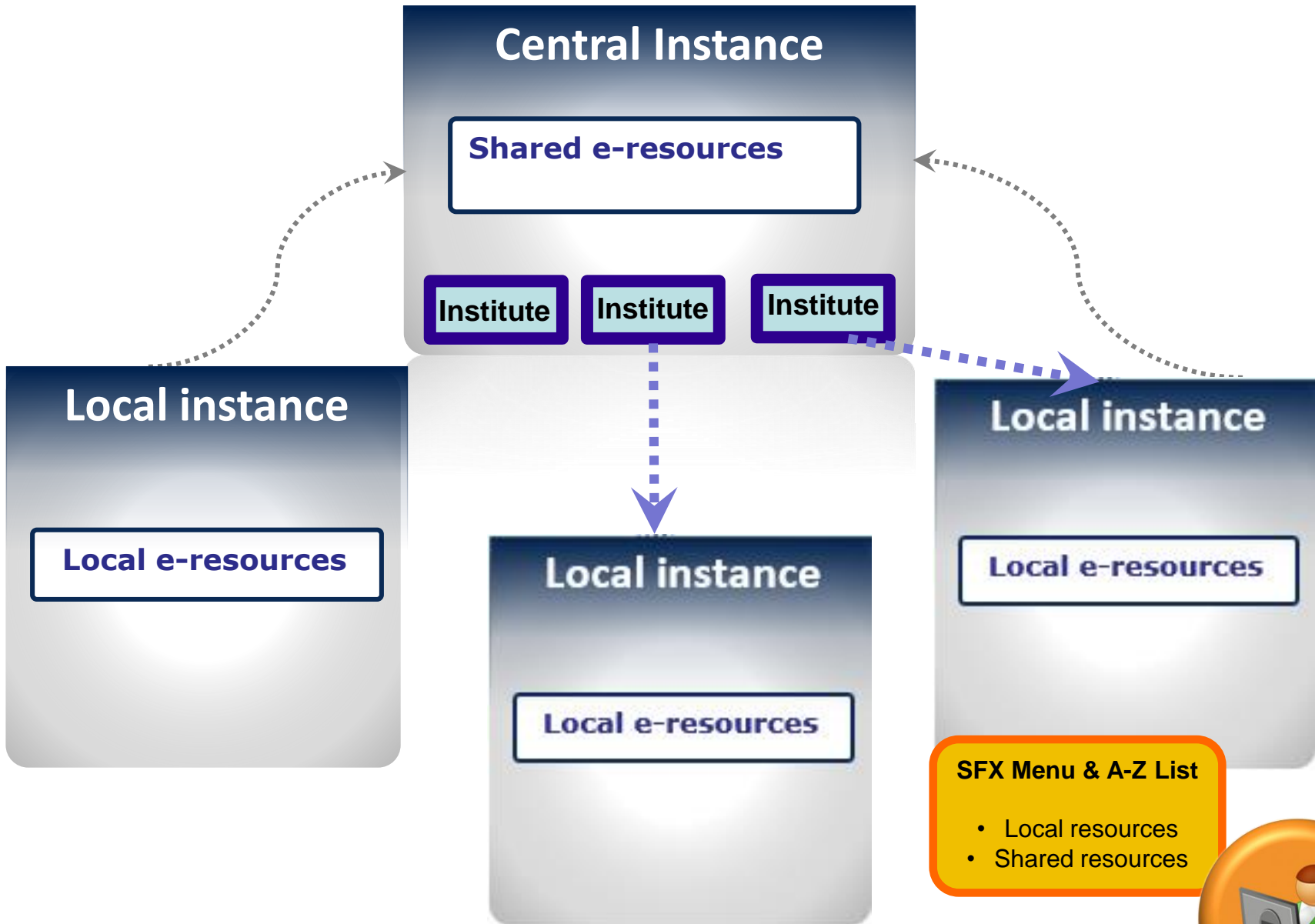
E-Resources Management in SFX



E-Resources Management in SFX



E-Resources Management in SFX



Central Instance

Shared e-resources

Institute

Institute

Institute

Local instance

Local e-resources

Local instance

Local e-resources

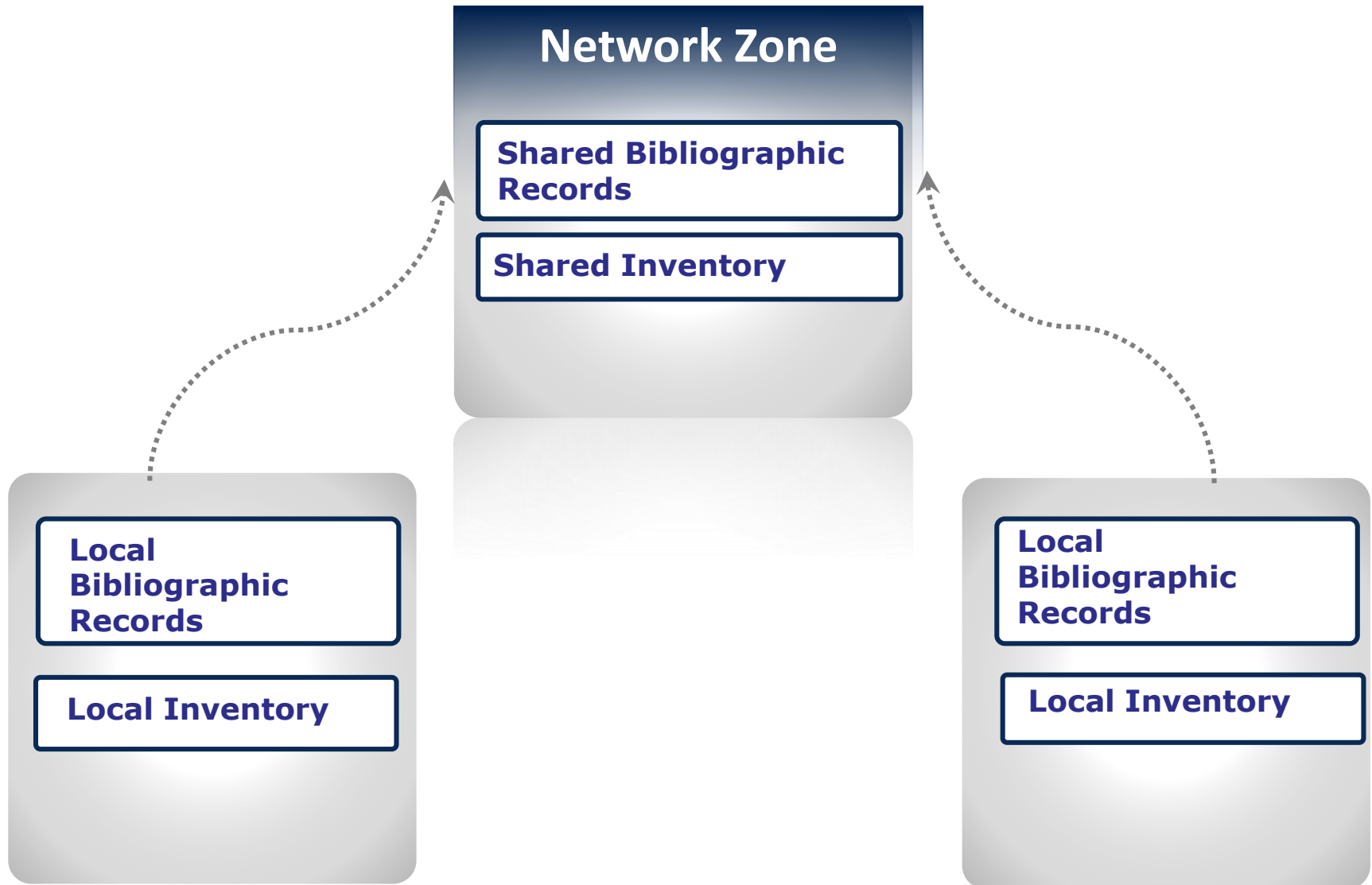
Local instance

Local e-resources

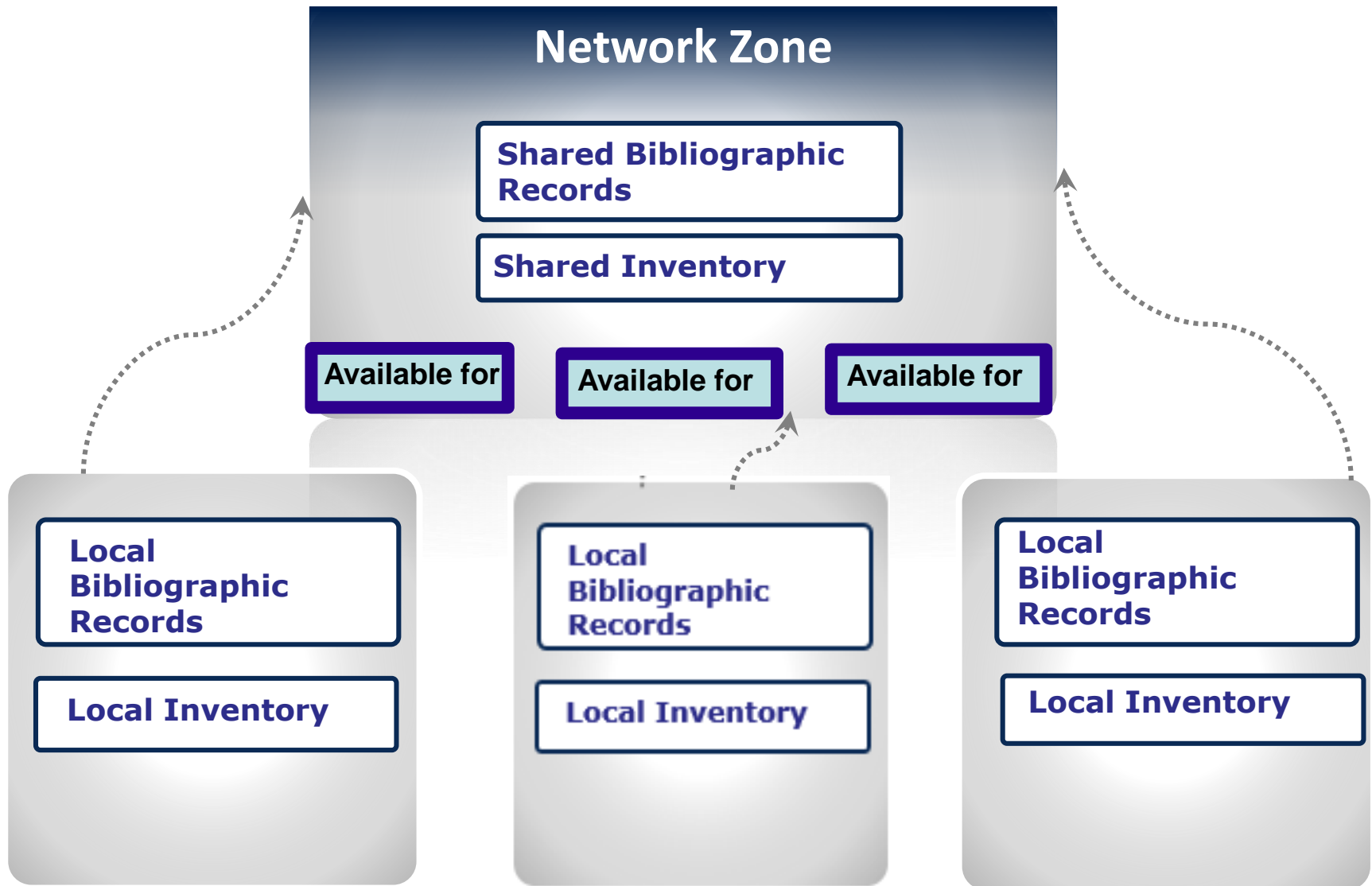
SFX Menu & A-Z List

- Local resources
- Shared resources

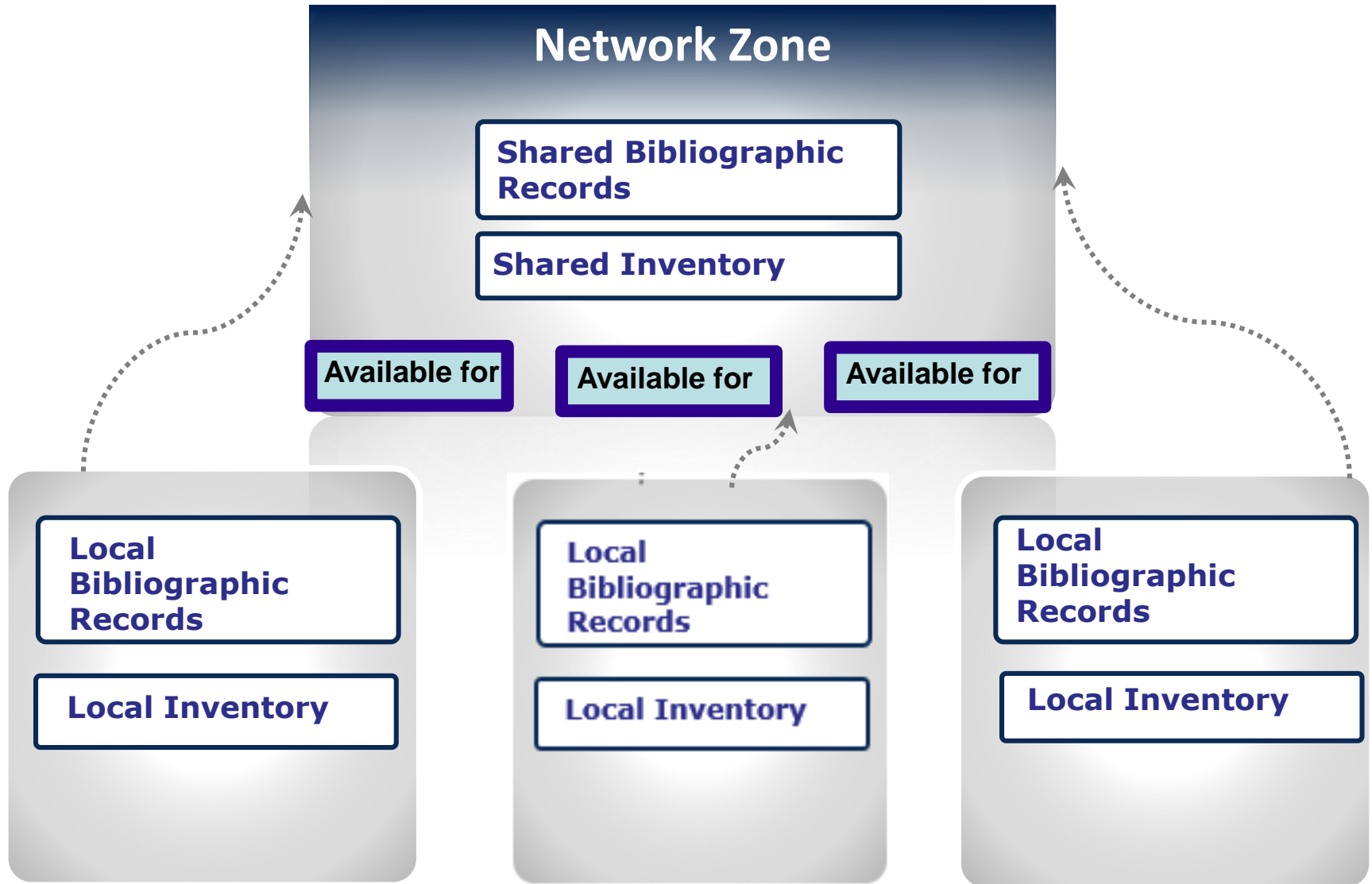
E-Resources Management in Alma



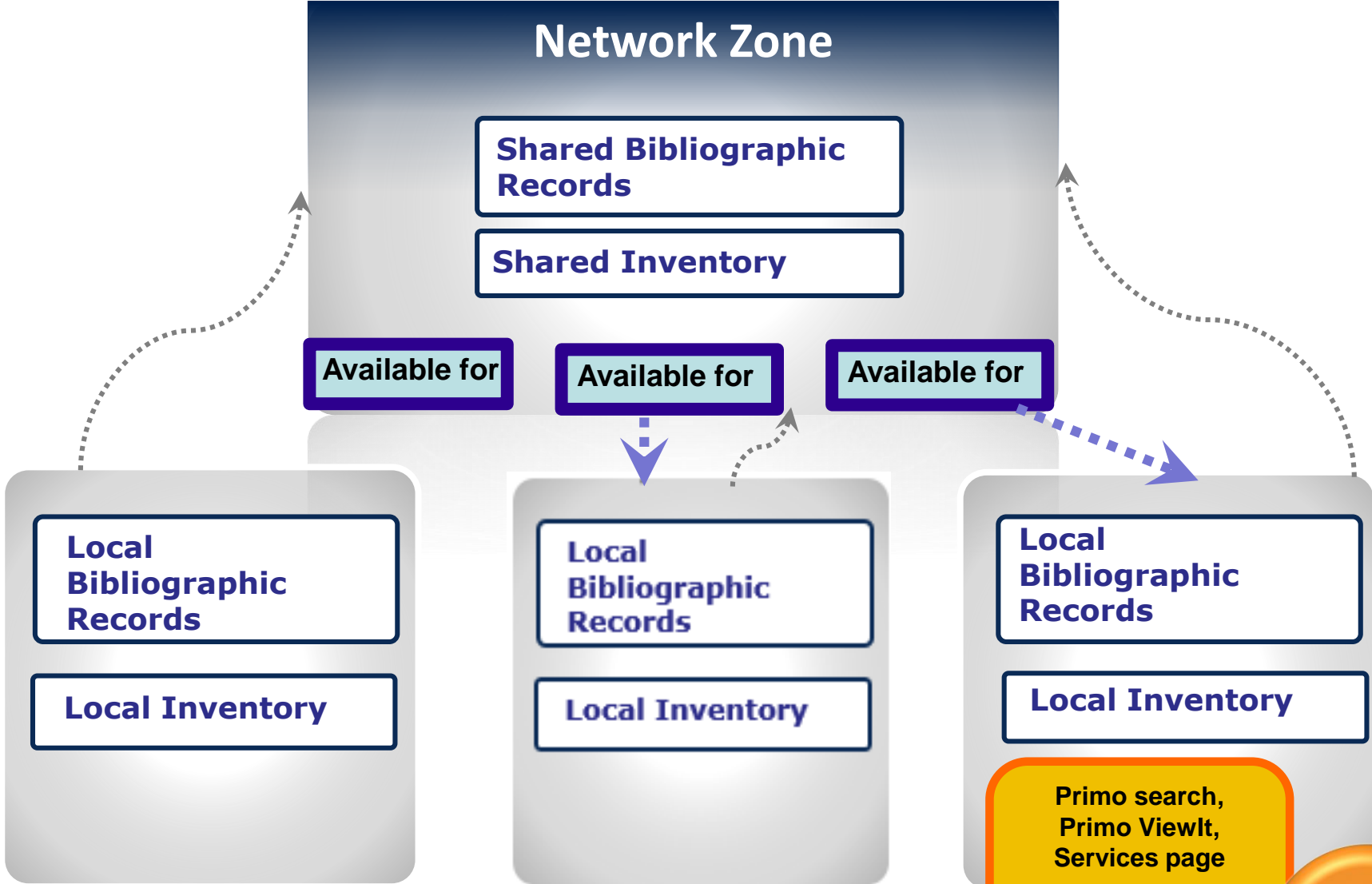
E-Resources Management in Alma



E-Resources Management in Alma



E-Resources Management in Alma



Primo search, Primo ViewIt, Services page

- Local resources
- Shared resources



SFX and Alma terminology

| SFX | Alma |
|---|--|
| SFX Knowledge Base | Alma Knowledge Base (a part of Alma Community Zone) |
| SFX Instance | Alma institute / zone |
| SFX Central Instance | Network Zone |
| SFX Local Instance | Institutional Zone |
| | |
| Target | Electronic Collection or Package |
| Target Service | Package Service |
| Portfolio | Portfolio |
| Object (basic bibliographic information) | Bibliographic record (full records) |
| Global/local targets, portfolios, targets, target servers | CZ/local electronic collection, service, portfolio, bibliographic record |
| Institute | 'Available for' |

SFX and Alma terminology

Alma and SFX

Proxy server

Threshold


Embargo

Parsers

Parser parameters

Let's Look at Alma

Repository search in network and institution

 Repository Search

Find where

Locally Managed e-Resource

Repository Search

Find where contains

Institution Network Community

Limit results to:

Material Type

- [Book \(2471\)](#)
- [Computer file \(3\)](#)
- [Journal \(160\)](#)
- [More \(2\)](#)




Language

- [Afrikaans \(4\)](#)
- [Arabic \(1\)](#)
- [Basque \(1\)](#)
- [More \(27\)](#)

Resource Type

- [2D non-projectable graphic - Physical \(1\)](#)
- [Audio musical - Electronic \(14\)](#)
- [Book - Electronic \(2262\)](#)
- [More \(10\)](#)

Primary Sort by Secondary Sort by

-  [Art history \[electronic resource\].](#)
Identifier: 0141-6790 Imprint: [Oxford] ; Blackwell Publishers, Print began in 1978.
Type: Journal Language: English Medium Type: [electronic resource]. Record number: (CONSER)--2002238655
Availability: [Electronic version](#) at EBSCOhost Academic Search Complete: Full Text
[Electronic version](#) at Wiley Online Library 2015 Full Collection: Full Text
[Electronic version](#) at Print Copy in the WWU Library: Selected Full Text
[Electronic Collection List](#) | [View It](#) | [Order](#) | [Document Delivery](#) | [Publishing information](#) | [More info](#)
-  [Digital Art History \[electronic resource\].](#)
Identifier: 1-84150-116-6 Imprint: Bristol ; Intellect, 2005.
Type: Book Language: English Medium Type: [electronic resource]. Record number: (OCoLC)133168424
Availability: [Electronic version](#) at ebrary Academic Complete: Full Text
[Electronic Collection List](#) | [View It](#) | [Order](#) | [Document Delivery](#) | [Publishing information](#) | [More info](#)
-  [Museum memories history, technology, art / Didier Maleuvre. \[electronic resource\].](#)
Identifier: 9780585047379 Imprint: Stanford, Calif. ; Stanford University Press, 1999.
Type: Book Language: English Medium Type: [electronic resource]: Record number: (OCoLC)42854998
Availability: [Electronic version](#) at NetLibrary (NetLibrary, Inc.): Full Text
[Electronic Collection List](#) | [View It](#) | [Order](#) | [Document Delivery](#) | [Publishing information](#) | [More info](#)

Network View of an e-Resources which is Locally Managed by Several Consortium Members

Repository Search

Find where contains [Advanced search](#) [Saved queries](#)

Limit results to:

- [Collection](#)
 - [Electronic title](#)
 - [Digital title](#)
 - [Physical title](#)
- [Book \(9430\)](#)
 - [Computer file \(27\)](#)
 - [Journal \(219\)](#)
 - [More \(4\)](#)
- [Afrikaans \(4\)](#)
 - [Altaic \(Other\) \(1\)](#)
 - [Arabic \(15\)](#)
 - [More \(54\)](#)

1 [Art History \[electronic resource\]](#)
Book {Book - Electronic} By Harris, Jonathan. (Hoboken : Taylor and Francis 2006.)
ISBN: 0-415-31977-3 and others
Series: Routledge Key Guides
Subject: Art. -- Art - History. -- Electronic books.
Language: English **Medium Type:** [electronic resource]. **Record number:** (CKB)100000000407554
Held by: [University of Idaho](#)
[Edit](#) | [Order](#)

2 [Art history \[electronic resource\]](#)
Journal {Journal - Electronic} ([Oxford] : Blackwell Publishers Print began in 1978.)
ISSN: 0141-6790
Subject: Art Periodicals. Historiography -- Art Historiography. -- Periodicals.
Language: English **Medium Type:** [electronic resource]. **Record number:** (OCoLC)50062676
Held by: [My Institution](#), [Central Oregon Community College](#), [Central Washington University](#), [Clark College](#), [Concordia University](#), [Eastern Oregon University](#), [Eastern Washington University](#), [Evergreen State College](#), [George Fox University](#), [Lane Community College](#), [Lewis & Clark College](#), [Linfield College](#), [Marylhurst University](#), [Mt Hood Community College](#), [Oregon Health and Science University](#), [Oregon Institute of Technology](#), [Oregon State University](#), [Pacific University](#), [Portland Community College](#), [Portland State University](#), [Reed College](#), [Seattle Pacific University](#), [Seattle University](#), [Southern Oregon University](#), [University of Idaho](#), [University of Oregon](#), [University of Portland](#), [University of Puget Sound](#), [University of Washington](#), [Walla Walla University](#), [Warner Pacific University](#), [Washington State University](#), [Western Oregon University](#), [Whitman College](#), [Willamette University](#)
[Edit](#) | [Order](#)

1 2 3 1 - 20 of 9,920 Records

Network View of an e-Resources which is Locally Managed by Several Consortium Members

2  [Art history \[electronic resource\].](#)

Journal {Journal - Electronic} ([Oxford] : Blackwell Publishers Print began in 1978.)


ISSN: 0141-6790

Subject: Art Periodicals. Historiography -- Art Historiography. -- Periodicals.

Language: English Medium Type: [electronic resource]. Record number: (OCoLC)50062676

Held by: [My Institution](#), [Central Oregon Community College](#), [Central Washington University](#), [Clark College](#), [Concordia University](#), [Eastern Oregon University](#), [Eastern Washington University](#), [Evergreen State College](#), [George Fox University](#), [Lane Community College](#), [Lewis & Clark College](#), [Linfield College](#), [Marylhurst University](#), [Mt Hood Community College](#), [Oregon Health and Science University](#), [Oregon Institute of Technology](#), [Oregon State University](#), [Pacific University](#), [Portland Community College](#), [Portland State University](#), [Reed College](#), [Seattle Pacific University](#), [Seattle University](#), [Southern Oregon University](#), [University of Idaho](#), [University of Oregon](#), [University of Portland](#), [University of Puget Sound](#), [University of Washington](#), [Walla Walla University](#), [Warner Pacific University](#), [Washington State University](#), [Western Oregon University](#), [Whitman College](#), [Willamette University](#)

[Edit](#) | [Order](#)

 **'Held By' Details**

| | |
|--------------------|------------------------------------|
| Title | Art history [electronic resource]. |
| Institution | Washington State University |

Holdings (0) | **Portfolios (3)** | **Representations (0)** | **Electronic Collections (0)** | **Orders (1)**

- 1 **Name:** EBSCOhost Academic Search Complete
- 2 **Name:** OCLC FirstSearch ECO Pullman
- 3 **Name:** Wiley Online Library 2015 Full Collection

Network View of an e-Resource which is Centrally Managed

Find where contains

Limit results to:

Type

[Aggregator package \(2\)](#)
[Database \(1\)](#)

Collection available for

[Reed College](#)
[Southern Oregon University](#)
[University of Washington](#)
[More \(6\)](#)

Primary Sort by

- Ebook Library (Demand Driven Acq)**
Type: Aggregator package Service: Full Text
[Portfolio List \(12827\)](#)
- Theatre in Video (Alexander Street Press)**
Type: Aggregator package Service: Full Text
Available For: CC; CHEMEK; SEAU; SOU; SPU; UBUGS; WWU
[Portfolio List \(438\)](#)
- Met Opera on demand - Student access**
Type: Database Service: Full Text
Available For: REED; UW; WWU
[Portfolio List \(523\)](#)

Network View of an e-Resource which is Centrally Managed

Find where contains

Limit results to:

Type

[Aggregator package \(2\)](#)
[Database \(1\)](#)

Collection available for

[Reed College](#)
[Southern Oregon University](#)
[University of Washington](#)
[More \(6\)](#)

Primary Sort by

- Ebook Library (Demand Driven Acq)**
Type: Aggregator package Service: Full Text
[Portfolio List \(12827\)](#)
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Available For: CC; CHEMEK; SEAU; SOU; SPU; UPGUS; WWU
[Portfolio List \(438\)](#)
- Met Opera on demand - Student access**
Type: Database Service: Full Text
Available For: REED; UW; WWU
[Portfolio List \(523\)](#)

'Available for' Definitions Associated with Centrally Managed e-Resources

Electronic Collection name Theatre in Video (Alexander Street Press)

Electronic Collection Description

General Information

Additional Information

Notes

Group Settings

History

Add Settings For Group

Columns 

| | Group Name | Group Members | Parameters | |
|---|------------|-------------------|------------|---------|
| 1 | SPU | 01ALLIANCE_SPU | ✓ | Actions |
| 2 | SOU | 01ALLIANCE_SOU | ✓ | Actions |
| 3 | CHEMEK | 01ALLIANCE_CHEMEK | ✓ | Actions |
| 4 | SEAU | 01ALLIANCE_SEAU | ✓ | Actions |
| 5 | UPUGS | 01ALLIANCE_UPUGS | ✓ | Actions |
| 6 | WWU | 01ALLIANCE_WWU | ✓ | Actions |
| 7 | CC | 01ALLIANCE_CC | ✓ | Actions |

Add Settings For Group

 Tools

End-User Experience

7 [The royal family \[electronic resource\].](#)
Theatre in Video (Alexander Street Press): getFullTxt
Available For: CC; CHEMEK; SEAU; SOU; SPU; UPGUS; WWU
[Edit](#) | [View](#) | [Deactivate](#) | [Order](#) | [Create E-Activation Task](#) | [Test access](#) | [Send To Ex Libris](#) | [More info](#)

- Great Britain (60)
- Kings and rulers (43)
- England (40)
- show/hide filters

- Date
- From To [Refine](#)
- 1990 To 2003 (169)
- After 2003 (201)

- Author/Creator
- Naxos Digital Services US (26)
- Anonymous (20)
- Traditional (15)
- show/hide filters

- Library
- Western Library (287)
- Music Library (18)
- Non-Library Collections (2)

☆ The royal family

Edna Ferber, 1887-1968.; Donald Barton; Kirk Browning, 1921-2008.; Forrest Buckman; Keene Curtis, 1923-2002.; Rosemary Harris; George S. Kaufman, (George Simon), 1889-1961.; Mary Layne, 1958-; Eva Le Gallienne, 1899-1991.; Sam Levene; Ellis Rabb, 1930-1998.; Mary Louise Wilson; American Bicentennial Theatre, Washington, DC.; Association of Producing Artists-Phoenix Theatre, New York, NY.; WNET (Television station : New York, N.Y.); n.d.

Video

Available

[Access Options](#) [Details](#)

Open source in a new window

[Email / Export](#)

▶ Get access from: [Theatre in Video \(Alexander Street Press\)](#)

[Report a problem](#)

Questions?
Chat with Us.

Working with Different Data Sources

Sources of E-Resource Data

- Electronic Collections Represented in Community Zone
→ find and activate in NZ for access by multiple institutions or in IZ for access by individual institutions

The screenshot displays the ExLibris Alma interface. At the top, the ExLibris logo and 'Alma' are visible. Below the navigation bar, the 'Repository Search' section is active. The search criteria are: 'Find Electronic Collection' where 'Electronic collection Name' contains 'alexander street press'. The search is filtered by 'Community'. The results are sorted by 'Rank' and list five items:

| Rank | Collection Name | Type | Service | Portfolio List | Actions |
|------|---|-------------------|-----------|-----------------------|--------------------------------------|
| 1 | Alexander Street Press Gilded Age | Selective package | Full Text | Portfolio List (351) | Activate Order Send To Ex Libris |
| 2 | Alexander Street Press Anthropology Online | Selective package | Full Text | Portfolio List (129) | Activate Order Send To Ex Libris |
| 3 | Alexander Street Press American Song | Selective package | Full Text | Portfolio List (6874) | Activate Order Send To Ex Libris |
| 4 | Alexander Street Press Caribbean Literature | Selective package | Full Text | Portfolio List (576) | Activate Order Send To Ex Libris |
| 5 | Alexander Street Press Social Theory | Selective package | Full Text | Portfolio List (418) | Activate Order Send To Ex Libris |

On the left side, the 'Limit results to:' section is expanded to show 'Electronic Collection Type' with the following options:

- Book Package (50)
- Journal Package (1)

Sources of E-Resource Data

- Marc data provided by vendors and agencies --> load marc file to NZ to provide access to multiple institutions. Use Alma import profiles, create shared electronic inventory, assign 'Available for' if required

Profile Type Repository Profile name MET OPERA

Profile Details Normalization & Validation Match Profile Set Management Tags Inventory Information

Inventory Operations

Electronic Physical None Mixed

E-Book Mapping

Delete/deactivate portfolios

Portfolio type Standalone Part of an electronic collection

Electronic Collection * Met Opera on demand - Student access

Service * Full Text

Material type Book

Multiple portfolios Single portfolio

Extract access URL from field 856 subfield u Indicators to skip (use # for empty indicator)

Extract internal description note from field 856 subfield y

Default internal description note

Extract authentication note from field 856 subfield x

Default authentication note

Extract public note from field 856 subfield z

Default public note

Extract library from field subfield Default library

Sources of E-Resource Data

- Marc data provided by vendors and agencies --> load marc file to IZ to provide access to an individual institution. Use Alma import profiles, create institutional electronic inventory

Profile Type Repository Profile name BT Marcive Online New

Profile Details Normalization & Validation Match Profile Set Management Tags Inventory Information

Profile Details

Use Network Zone Yes

Profile name BT Marcive Online New

Profile description Load Marcive monthly new online full bibs & create portfolios

Originating system * WorldCat File name patterns WEWAON

Import Protocol FTP Cross walk No Yes

Physical source format Binary

Encoding format ISO8859_1

Source format MARC21 Bibliographic Target format MARC21 Bibliographic

Status Active

Scheduling

Files to import All New

Scheduler status Active Inactive

Scheduler * Every Saturday at 01:00

FTP Information

Description

Server ftp.marcive.com Port 21

UserName anonymous Password

Sources of E-Resource Data

- Electronic Collections Represented in Community Zone, bibliographic data is provided by vendors:
 - Activate CZ e-resource
 - Load bibliographic data and overlay CZ bibliographic record
- Result: benefit from CZ linking information updates and from improved quality of bibliographic data

The screenshot displays a web interface for configuring match profiles. At the top, there are five tabs: 'Profile Details', 'Normalization & Validation', 'Match Profile', 'Set Management Tags', 'Inventory Information', and 'Mapping'. The 'Match Profile' tab is active. Below the tabs, the 'Match Profile' section contains two dropdown menus: 'Serial match method' and 'Non Serial match method', both set to '001 To MMS_ID Match Method'. The 'Match Actions' section includes radio buttons for 'Handling method' (Automatic selected, Manual unselected) and 'Upon match' (Merge selected, Overlay unselected, Do Not Import unselected, Import New Record unselected). A 'Merge/Overlay' section contains a dropdown for 'Merge method' set to 'Overlay all fields but local'. Below this are four checked checkboxes: 'Allow bibliographic record deletion', 'Do not override/merge a non-brief record with a brief version', 'Unlink bibliographic records from community zone' (highlighted with a red box), and 'Do not override/ merge record with an older version'. At the bottom, there are radio buttons for 'Do not override/ merge record with an older version' (Disabled unselected, Consider Originating System selected, Ignore Originating System unselected).

Profile Details Normalization & Validation Match Profile Set Management Tags Inventory Information Mapping

Match Profile

Serial match method 001 To MMS_ID Match Method

Non Serial match method 001 To MMS_ID Match Method

Match Actions

Handling method Automatic Manual

Upon match Merge Overlay Do Not Import Import New Record

Merge/Overlay

Merge method Overlay all fields but local

Allow bibliographic record deletion

Do not override/merge a non-brief record with a brief version

Unlink bibliographic records from community zone

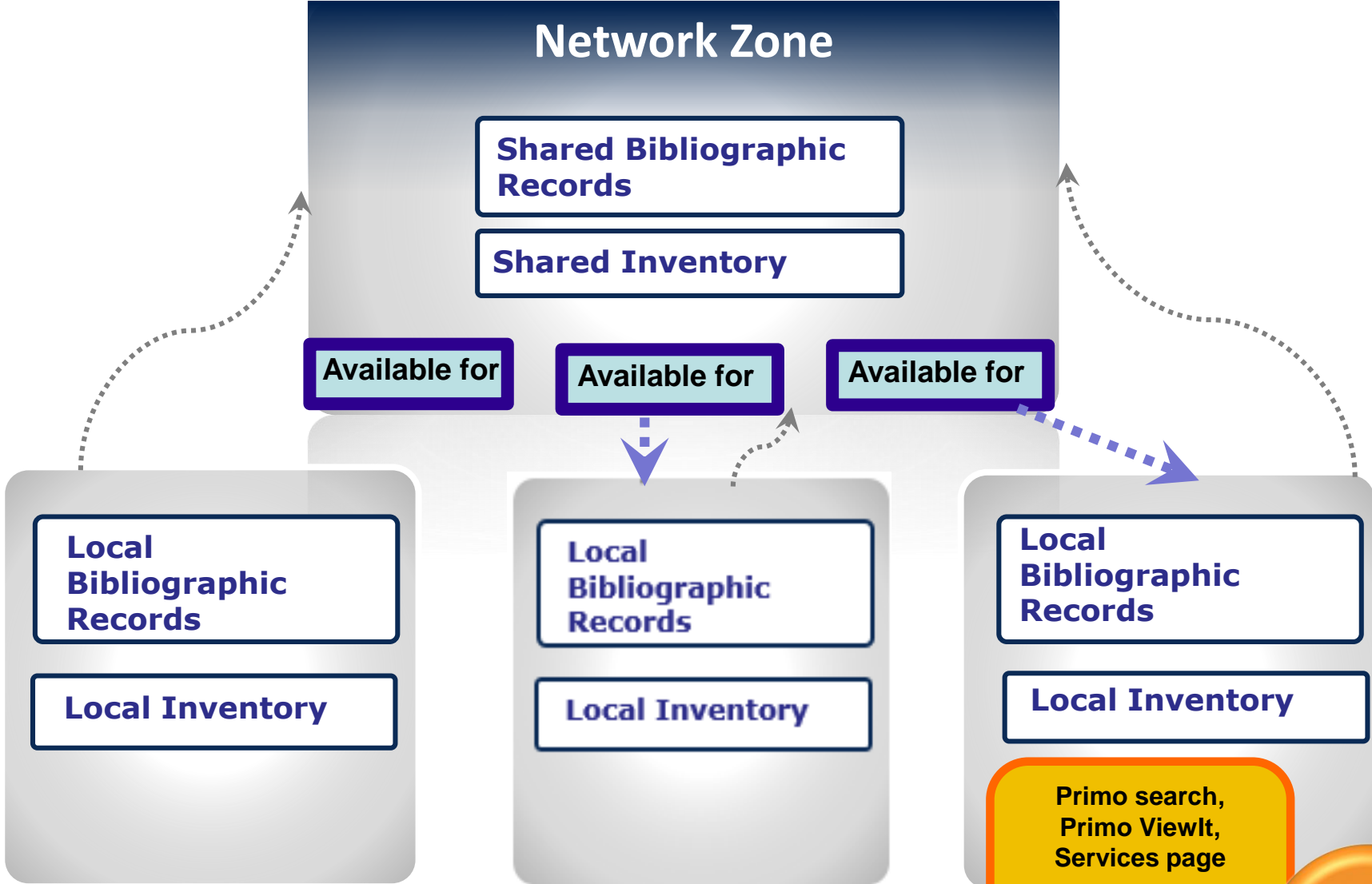
Do not override/ merge record with an older version Disabled Consider Originating System Ignore Originating System

Suggested Action

- Examine e-resource managed by institutions
- Find candidates for consolidation

Manage Complete e-Resource Lifecycle from Negotiation to Activation in Alma

E-Resources Management in Alma



Complete E-Resources Management Cycle in Alma



Acquisition Workflow

Model 1 – local acquisition, licensing and management

E-resources are licensed and managed by individual institutions due to their specific needs

Model 2 – centralized acquisition, licensing and e-resources management

E-resources are licensed and managed by consortium center for all institutions or selected institutions

Model 3 – centralized negotiation and management, local acquisition

License terms and fees are negotiated by the central office, purchasing and invoice processing is done by individual institutions

Model 1 – Local Acquisition, Licensing and Management

- ▶ All steps of e-resource management cycle are performed by an individual institution in Alma Institutional Zone.

Description Gale Cengage Academic OneFile, Galegroup
Order line type Electronic Collection - One PO Line Owner BURNS
Order/Line - / POL-9915 Status In Review (2015-10-20)
Sent Date -

Summary Description **Institutional License** Communications Interested Users History Notes Attachments

Ordered items

eResource Gale Cengage Academic OneFile
License View license

| Name | Type | Status | Activation date |
|---------------------------------|------|--------|-----------------|
| 1 Gale Cengage Academic OneFile | Aggr | | 10/20/2015 |

Vendor information

Material Supplier *
Access Provider *
Expected Activation after Ordering (days)
E-Activation due after Ordering (days) 30

Claiming grace period (days) 0
Or Expected Activation Date

Pricing

List Price * USD
Quantity for pricing * 1

Net price 0.00 USD
Discount (%) 0.0

Funding

Quick Add

Fund *
Percent 100.0
Amount 0.00 USD **Add Fund**

Model 2 - Centralized Acquisition, Licensing and e-Resources Management

- ▶ The entire flow is managed by the central office in the Network Zone
- ▶ Central office maintains:
 - ▶ Funds
 - ▶ Vendors
 - ▶ Licenses
 - ▶ E-products
- ▶ Central office acquires, processes payment, negotiates license agreement and activates e-resources

Model 2 - Centralized Acquisition, Licensing and e-Resources Management

- ▶ Central office wishes to purchase electronic collection “Gale Cengage Academic OneFile” for two member institutions
- ▶ Solution
 - ▶ Locate electronic collection in CZ
 - ▶ Place an order
 - ▶ Activate “Gale Cengage Academic OneFile” for the relevant institutions

Model 2 - Centralized Acquisition, Licensing and e-Resources Management

- Login to Network and locate electronic collection in CZ

The screenshot displays a 'Repository Search' interface. At the top, there is a search bar with the following fields: 'Find' (set to 'Electronic Collection'), 'where' (set to 'Keywords'), and 'contains' (set to 'Gale Cengage Academic OneFile'). A 'Go' button is located to the right of the search bar. Below the search bar, there are two tabs: 'Institution' and 'Community'. On the left side, there is a 'Limit results to:' section with several filter buttons: 'Type', 'Interface', 'Electronic Collection Type', and 'Journal Package (1)'. The 'Type' filter is currently selected. In the main search results area, the 'Primary Sort by' is set to 'Rank'. A single result is displayed, titled '1. Gale Cengage Academic OneFile'. The result details include: 'Type: Aggregator package', 'Services: Full Text (Available)', 'Creation Date: 2015-10-20 02:57:02', and 'Modification Date: 2015-10-20 02:57:02'. Below the details, there are several action links: 'Edit', 'Delete', 'View', 'Portfolio List (7848)', 'Order', 'Create E-Activation Task', 'Publishing information', 'Edit Service', 'Send To Ex Libris', and 'More info'. The 'Order' link is circled in blue. The 'Gale Cengage Academic OneFile' title is also circled in blue.

Model 2 - Centralized Acquisition, Licensing and e-Resources Management

➤ Place a shared order

Description Gale Cengage Academic OneFile, Galegroup
Order line type Electronic Collection - One PO Line Owner BURNS
Order/Line - / POL-9915 Status In Review (2015-10-20)
Sent Date -

Summary Description Alerts Communications Interested Users History Notes Attachments

Ordered items

eResource Gale Cengage Academic OneFile
License View license

| Name | Activation status | Activation date |
|---------------------------------|-------------------|-----------------|
| 1 Gale Cengage Academic OneFile | Active | 10/20/2015 |

Vendor information

Material Supplier *
Access Provider
Expected Activation after Ordering (days)
E-Activation due after Ordering (days) 30

Claiming grace period (days) 0
Or Expected Activation Date

Pricing

List Price * USD
Quantity for pricing * 1

Net price 0.00 USD
Discount (%) 0.0

Funding

Quick Add

| Fund* | Percent | Amount |
|-------|---------|----------|
| | 100.0 | 0.00 USD |

Add Fund

Shared License

Shared Vendor

Shared Fund

Model 2 - Centralized Acquisition, Licensing and e-Resources Management

- Activate “Gale Cengage Academic OneFile” via Electronic activation task list

Electronic Resource Activation Task List

Assigned to Me | Unassigned

Status: Opened Tasks | PO Line Owner: All | Expected Activation Date: All

Find: | in: All | Go

1 - 1 of 1 Records | Columns | Tools

| Title | Type | Status | Status Date | Modified By | Identifier | Due Date | Expected Activation Date | PO Line Owner | Order Line | Notes | Actions |
|-------------------------------|--------------------|--------------|-------------|-------------|------------|------------|--------------------------|---------------|------------|-------|---------|
| Gale Cengage Academic OneFile | Aggregator package | Check Access | 10/20/2015 | exl_impl | - | 11/19/2015 | - | BURNS | POL-9915 | | Actions |

Check Access | Change Status

- Make “Gale Cengage Academic OneFile” available for consortium members by defining ‘available for’ groups

Electronic Collection Editor

Electronic Collection name: Gale Cengage Academic OneFile

Electronic Collection Description | General Information | Additional Information | Notes | Group Settings | History

Add Settings For Group

| Group Name | Group Members | Parameters | Actions |
|---------------------------|-----------------|------------|---------|
| 1 University of Knowledge | TRAINING_2_INST | | Actions |
| 2 Alma University | EXLDEV1_INST | | Actions |

Cancel | Save

Model 2 - Centralized Acquisition, Licensing and e-Resources Management

- view of “Gale Cengage Academic OneFile” via staff search

The screenshot displays the Alma library system interface. At the top, the ExLibris logo and 'Alma' branding are visible. The main search area includes a search bar with 'Electronic Collection' selected and 'Keywords' as the search criteria. Below the search bar, there are tabs for 'Institution', 'Network', and 'Community', with 'Network' highlighted. The 'Limit results to:' section on the left includes filters for 'Type', 'Interface', 'Electronic Collection Type', and 'Collection available for'. The 'Collection available for' filter is circled in blue, showing 'Alma University' and 'Open University'. The search results on the right show a single result: '1 Gale Cengage Academic OneFile', with details including 'Type: Aggregator package', 'Service: Full Text', and 'Available For: Alma University; Open University Portfolio List (7848)'. The 'Primary Sort by' dropdown is set to 'Rank'.

Model 2 - Centralized Acquisition, Licensing and e-Resources Management

- Create centrally managed license

Model 3 – centralized negotiation and management, local acquisition

- ▶ Central office negotiates electronic resources on behalf of consortium members
- ▶ Electronic resources are managed centrally in the Network Zone
- ▶ Members manage the acquisition and payment independently in IZ based on local funds

Acquisition Network – Central Negotiation

- ▶ Central office negotiates a deal with a vendor & records information in a License of type 'Negotiation'
- ▶ Negotiation License includes:
 - ▶ Content
 - ▶ License Terms & Use
 - ▶ Members for which the negotiation is negotiated for
 - ▶ Price per member

Acquisition Network – Central Negotiation

License of Type Negotiation managed in the Network Zone

The screenshot displays the Alma system interface for license management. At the top, the Alma logo and navigation menu are visible. The main content area shows the details for a Springer license, created on 02/15/2015. The 'Negotiation Details' tab is selected and circled in red. Other tabs like 'Inventory' and 'Amendments' are also circled. The 'License type' is set to 'Negotiation', which is also circled in red. The form includes fields for Name, License status, Signed by, Second party's Signed by, Start date, License location, License URI, License code, Licensor, Signed on, Second party's Signed on, End date, License review status, and Licensing agent. A 'Save' button is located at the bottom right.

| License Springer | | Creation date 02/15/2015 | Created by Ex Libris Support | License type Negotiation | | | |
|--------------------------|----------------|--------------------------|------------------------------|--------------------------|---------|-------|-------------|
| Summary | License Terms | Inventory | Amendments | Negotiation Details | History | Notes | Attachments |
| Name * | Springer | License code * | SPRINGER | | | | |
| License status | Active | Licensor | | | | | |
| Signed by | | Signed on | | | | | |
| Second party's Signed by | | Second party's Signed on | | | | | |
| Start date * | 02/15/2015 | End date | | | | | |
| License location | Finance Office | License review status | Pending | | | | |
| License URI | | Licensing agent | | | | | |

Acquisition Network – Central Negotiation

Negotiation Details : Members, Price

ExLibris Network **Alma** Tasks Analytics Currently at: None Help Institutions

Licenses and Amendments

License Springer Creation date 02/15/2015 Created by Ex Libris Support License type Negotiation

Summary License Terms Inventory Amendments **Negotiation Details** History Notes Attachments

Find: In: Member Name 1 - 2 of 2 Records Columns

| | Member Name | Member's Contact Email | Price | Currency | Start date | End date | Order Status | Notes | |
|---|-----------------|------------------------|-------|----------|------------|------------|--------------|-------|--|
| 1 | Open University | - | 1000 | USD | 03/01/2015 | 03/01/2015 | - | | <input type="button" value="Actions"/> |
| 2 | Alma University | - | 1500 | USD | - | - | - | | <input type="button" value="Actions"/> |

Acquisition Network – Central Negotiation

Negotiation Inventory Content: Springer Collection

The screenshot displays the Ex Libris Inventory interface for a negotiation. At the top, the page title is "Inventory" with a user name "Ex Libris" and a "Save" button. Below this, a header bar shows "License Springer", "Creation date 02/15/2015", "Created by Ex Libris Support", and "License type Negotiation". A navigation menu includes "Summary", "License Terms", "Inventory" (selected), "Amendments", "Negotiation Details", "History", "Notes", and "Attachments".

The main content area is titled "Active Resources" and contains a search bar with "Find:" and "in: Resource name" dropdown, and a "Go" button. Below the search bar, it shows "1 - 1 of 1 Records" and a "Tools" button. A table with the following columns is displayed:

| Resource Type | Resource Name | Active From |
|-------------------------|-----------------------------------|-------------|
| 1 Electronic Collection | Springer Lecture Notes in Physics | 02/15/2015 |

The "Resource Name" cell is circled in red. Below the table is a section titled "History of Resources" with a "Filter All" button and the message "No records were found." At the bottom right, there are "Cancel" and "Save" buttons.

Acquisition Network – Central Negotiation

- ▶ Unlike previous model every member places an order
 - ▶ From within the member IZ – Repository Search
 - Network tab locate the electronic resource that is available for the member
 - ▶ Member places an order
 - ▶ PO Line is created in IZ with IZ related information:
 - ▶ Price
 - ▶ IZ Funds
 - ▶ Vendor (can be an NZ vendor)
 - ▶ License (can be a NZ license)
 - ▶ PO Line is created with no inventory in the IZ linking to the electronic resource in the NZ

Acquisition Network – Central Negotiation

Negotiated content is available via the Network tab
Member can place an Order

The screenshot displays the Alma library system interface. At the top left, the ExLibris Open University logo and the Alma logo are visible. The main navigation bar includes 'Tasks', 'Analytics', and 'Currently at: Central Library - Default C...'. Below this is the 'Repository Search' section. The search criteria are set to 'Find Electronic Collection where Electronic collection Name contains Springer Lecture Notes in Physics'. The search results are filtered by 'Institution' and 'Network' (both circled in red). The 'Network' tab is selected, showing a list of results. The first result is 'Springer Lecture Notes in Physics', which is a 'Selective package' with 'Full Text' service. It is 'Available For: Alma University, Open University' and has a 'Portfolio List (1664)' and an 'Order' link (both circled in red). The left sidebar shows various filters such as 'Type', 'Interface', 'Springer Link (1)', 'Electronic Collection Type', 'Book Package (1)', and 'Collection available for' (Alma University, Open University). The 'Primary Sort by' is set to 'Rank'.

Acquisition Network – Central Negotiation

Member places an Order according to the negotiated details –
Price, License, Subscription period

Description **Springer Lecture Notes in Physics** PO Line Owner Central Library Order/Line -/ POL-110 Status In Review (2015-10-20)
Order line type Electronic Collection - Subscription Sent Date -

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History Notes Attachments

Ordered items
License Springer [View license](#)

| Name | Type | Activation status | Activation date |
|-------------------------------------|--------------------|-------------------|-----------------|
| 1 Springer Lecture Notes in Physics | Aggregator package | Active | - |

Vendor information
Material Supplier * Access Provider
Expected Activation after Ordering (days) Claiming grace period (days) 0
E-Activation due after Ordering (days) 30 Or Expected Activation Date

Pricing
List Price * 1000.00 USD Net price 1,000.00 USD
Quantity for pricing * 1 Discount (%) 0.0

Funding
Quick Add
Fund* Percent 100.0 Amount 1000.00 USD

Acquisition Network – Central Negotiation

- ▶ Activation is done in NZ by consortium central office

Workflow Discussion

- ▶ What acquisitions and licensing workflow do you follow?
- ▶ Implementation considerations:
 - ▶ To support model 2 NZ must be populated with vendors (material suppliers and licensors) and funds.
 - ▶ To support model 3 NZ must be populated with vendors (licensors).



Thank you!