E-resources and the Community Zone

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ANZREG in July: Alma / Primo Best Practice Day
The starting point

Voyager: extensive holdings of ebooks

Alma: standalone portfolios

Sets

Local electronic collections

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Link to community

• Improved linking
  • Useful when platform links have changed
  • Linking to chapters from Primo

• Option to keep local bibs
  • Don’t lose the efforts of our own cataloguers
  • Are CZ bibs better?

• Why not?
  • Requires ISBN match between local and CZ record
  • Multi-volume titles
  • Large collections: many records to check

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New monographs: individual titles

• Activate from CZ
  • Saves time on locating the right record/link
  • Full benefits of PCI content/linking
  • Automatically attached to collection with licence information

• Does the CZ bib record need work?
  • Assign to a cataloguer
  • Upgrade the CZ record → benefit to other institutions

• Frees staff to concentrate on tricky titles
New monographs: collections

• Points to consider:
  • Is there an exact CZ collection match?
  • Is there a partial CZ collection match?
    • Activation by ISBN
  • Are the CZ bib records of adequate quality?
  • Does the vendor provide their own MARC records?
    • Import profiles
    • Can still be linked to community
What if there is no CZ content?

- Bib records
  - MARC files from vendors
  - Import from Libraries Australia
  - If necessary, make it up!

- Portfolios
  - Create using URLs in MARC imports
  - Batch load from spreadsheet
  - Parsers where available
  - Dynamic URLs for PCI content without parsers
Contributing to the CZ

• Locally hosted open access content: OJS
  • Locally created bib records and portfolios (with parser)
  • Initial submission as a bulk collection
  • New titles by raising a support case (Report to Ex Libris)
We have the tools

Image: adapted from ‘Tools’ by Tony Walmsley, https://flic.kr/p/bp8DZi, Creative Commons licence BY 2.0

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Drivers for the re-design of e-resource workflows: focus on Alma

ANZREG in July 2016 – Alma / Primo Best Practice Day
Alison Neil UNSW Australia a.neil@unsw.edu.au
Collection Setup Guidelines

Subscribe to eBooks (no ownership)

Is there a community zone collection?

Yes
- Activate electronic collection
- Activate EzProxy via the service level
- Attach licence
- Add any globally required authentication or public notes
- Auto-active activated if we subscribe to complete package

No
- Create a local electronic collection
- Try to import MARC records or use load portfolios
- Activate a PCI collection if only that exists

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## Collection Setup Guidelines

### Purchase eBooks (ownership)

<table>
<thead>
<tr>
<th>Are there MARC records available?</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
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<td>Create a local electronic collection</td>
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ASP World History in Video

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# Collection Setup Guidelines - Exceptions

<table>
<thead>
<tr>
<th>Collection</th>
<th>Details</th>
</tr>
</thead>
</table>
| **Oxford Scholarship online**           | We purchase all collections  
Load MARC records quarterly  
Unable to use community zone collection as it includes UPS titles |
| **ArtFilms**                            | We subscribe to the collection, but load or create MARC records for new titles.  
Email is received from publisher on what is new |
| **Elsevier eBook series**               | We purchase certain book series each year  
Activate community series title  
Create local portfolios for individual volumes, after receiving email notifications, most of these are initially local records, which have to be replaced by community records as the community records don’t update fast enough |
**Collection Setup Guidelines - Exceptions**

**eBook titles ordered via YBP**

We purchase MARC records via YBP for all approval plan titles and download any firm order records from OCLC.

**ICE eBooks**

We purchase top up each year and there are MARC records available.

We have a local electronic collection for all years up to 2015.

We utilise the auto active feature of the community zone collection to activate the 2016 titles, will then load 2016 MARC record at the beginning of 2017 to the local electronic collection and start again.
Why follow these guidelines?

- Alma in 2013 did not have many eBook community electronic collections
- Poor quality of the community records
- Loading of MARC records compared to Aleph was a breeze

Principles followed:

- Make an effort to have good records for those collections we own
- Only use MARC records we can obtain easily
- Review each new eBook package to see what option to use
- Minimise processes as much as possible
What affect do these guidelines have?

- Processing of these type of records is not managed the same way, so may be confusing
- Available options change as Alma is developed or as publishers provides more information
- Use of local electronic collections mean we can’t utilise PCI record completely
- We provide the best records we can to our users
- Minimise the amount of ongoing processing for certain collections

What changes would we like to see?

- Both local and community holding are picked up for use by PCI
- Good community zone collections for streaming packages, e.g. Lynda.com; Kanopy
- Community zone collections that match what we subscribe to
Drivers for the re-design of e-resource workflows: focus on Alma

Kendall Kousek Macquarie University Australia
Ebooks and Streaming Videos at Macquarie University

• Workflows: individual ebook titles, ebook packages (subscription or outright purchase) and streaming videos/mixed material

• Driver: Alma community zone record quality/availability

• Outcome: local bibliographic records and portfolios
Workflow for individual titles

• Purchased through vendor e.g. GOBI

• Load Electronic Order Confirmation Record (EOCR) with import profile – standalone local portfolio is inactive and bibliographic record does not publish to Primo

• Load full bibliographic record with URL to overlay EOCR – standalone local portfolio is active and bibliographic record does publish to Primo

• Load EDI invoice
Workflow for ebook packages

• Source of records noted upon acquisition
• Attach POL to suppressed bib record or local electronic collection
• Records sourced from Serials Solutions, vendor or OCLC
• History: used Serials Solutions knowledge base to track subscriptions for 360Link and received 360MARC records for ejournals and ebooks
Workflow for streaming videos

• Similar to ebook packages
• Records not available in Serials Solutions knowledge base
• Mainly sourced from vendor
• Import profiles created in Alma
# eBooks and Streaming Videos at Macquarie University

Who does the work?

<table>
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<th>Collections &amp; Content Development (CCD)</th>
<th>Collection Assessment &amp; Continuations (CAC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual book/ebook outright purchases</td>
<td>Individual journal subscriptions</td>
</tr>
<tr>
<td>Ebook package outright purchases</td>
<td>Journal and ebook package subscriptions</td>
</tr>
<tr>
<td>Streaming video outright purchases</td>
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</tr>
<tr>
<td>&amp; other work</td>
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Community Zone record/Vendor-supplied record

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Discussion

What do you think?

What tips could you pass on?

What do we need to pass on to Ex Libris?

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