Alma E-Resources – Scenarios and Workflows

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Electronic Resources – Scenarios and Workflows

The diagram below guides you through questions that help you determine which workflow to follow. When you stop on one of the paneled rectangles, you can click to link to a page with more details about how to proceed.

Link to **chart**.

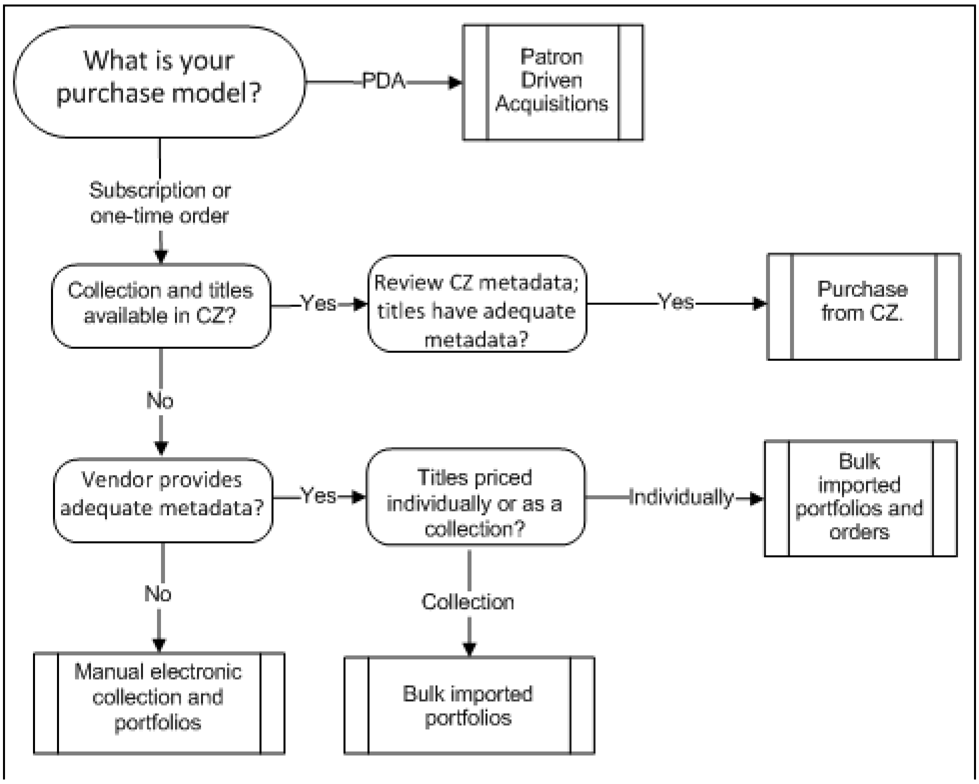

Figure 1: Electronic Resource Flowchart

Patron-Driven Acquisitions (PDA)

Recap: Your purchasing model is patron-driven acquisition (PDA) so you will follow the Alma workflow for PDA.

What now: Follow the workflow as described in **Patron Driven Acquisitions**. Instructions and references are available there.

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Local Electronic Collection

Recap: You have not found your resources in the Community Zone (or have found the resources lacking), and instead will create a local collection and portfolios. Because the vendor does not provide adequate metadata for each title, you will either create each title manually or import it from another source.

What now: Create your electronic collection and portfolios either manually or by bulk importing records from a non-vendor source, then order either the collection or portfolios.

Steps:

1. Create a local electronic collection by selecting **Resource Management > Create Inventory > Add a Local Electronic Collection**. For more information, see **Adding a Local Electronic Collection**.
2. Add titles (portfolios) to the electronic collection. Use one of the following methods:
   - Bulk import titles into the collection. (See **Loading Multiple Portfolios in an Electronic Collection (Batch File Processing)**.)
   - Add local portfolios one by one. (See **Adding a Standalone Portfolio** and **Adding a Portfolio to an Electronic Collection**.)
3. Search for the electronic collection and select **Order** from the results entry if you will be billed on one line-item for the whole collection. Search for each portfolio and create multiple orders if you will be billed for each title in the collection. For an explanation of PO line types, see **Explanation of Purchase Types Workflow and Inventory**. For information on creating a PO line, see **Manually Creating a PO Line** of the Acquisitions Guide)
4. Activate the purchased electronic resource. For information on activating a portfolio and electronic collection, see **Activating Electronic Resources**.

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Bulk Imported Portfolios

Recap: You are creating a local electronic collection for which the vendor has adequate bibliographic metadata. (The resource does not exist in the CZ or does not contain adequate bibliographic metadata in the CZ.) The vendor does not support EOD.

What now: Create your electronic collection by bulk importing records from the vendor, then ordering them.

Steps:

1. Create a local electronic collection by selecting **Resource Management > Create Inventory > Add a Local Electronic Collection**. For more information, see **Adding a Local Electronic Collection**.
2. Import the records using the Repository import profile. (See **Selecting a Profile Type**). On the Inventory Information tab for Electronic inventory, select **Part of an electronic collection** to group incoming portfolios as a collection. See **Creating the Profile Using the Wizard**.
3. Search for the electronic collection and select **Order** from the results entry if you will be billed on one line-item for the whole collection. Search for each portfolio and create multiple orders if you will be billed for each title in the collection. For an explanation of PO line types, see **Explanation of Purchase Types Workflow and Inventory**. For information on creating a PO line, see **Manually Creating a PO Line** of the Acquisitions Guide)
4. Activate the purchased electronic resource. For information on activating a portfolio or an electronic collection, see **Activating Electronic Resources**.

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Bulk Imported Portfolios and Orders

Recap: You are creating a local electronic collection for which the vendor has adequate bibliographic metadata. The vendor supports EOD.

What now: Import portfolios using New Order Import EOD profile

Steps:

1. Create a local electronic collection by selecting **Resource Management > Create Inventory > Add a Local Electronic Collection**. For more information, see **Adding a Local Electronic Collection**.
2. Use the New Order type of import profile to import bibliographic records from the vendor, creating a standalone portfolio for each title with its own PO line and access details. (See **Creating the Profile Using the Wizard**.)
3. On the Import Profile Details page:
   - In the PO Line Information tab, EOD Mapping section, map vendor fields and Alma attributes. (See **Working with EOD Field Mapping**)
   - In the Inventory Information tab, select the option to create standalone portfolios or portfolios as part of a collection. (A PO line is created for each portfolio, regardless of the option you select).
   - In the Inventory Information tab, select **Activate** to make these portfolios available to users on import.
4. If the vendor later sends a second load of records that includes URLs linking to each title, use the Update Inventory type of import profile to update each portfolio. (See **Understanding the Update Inventory Import Profile**)
   - In the PO Line Information tab, EOD Mapping section, enter the Vendor reference number field so that it will contain the same identifier as that of the first load. This will enable matching by PO line identifier. (See **Working with EOD Field Mapping**.)
   - In the Inventory Information tab, select **Activate** to make these portfolios available to users on import.

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Purchase from Community Zone

Recap: You have found the electronic collection and titles in the CZ and have verified that the titles you are ordering have adequate bibliographic metadata.

What now: Attach a PO line to the CZ collection or title and follow the Acquisitions purchasing workflow.

Steps:

1. Locate the collection or portfolio you want to order in the CZ. Use an electronic collection if you will be billed on one line-item for the whole collection. Use individual portfolios and create multiple orders if you will be billed for each title in the collection. Once you have found your item in the CZ, click **Order** in the results entry.
2. Follow the standard ordering workflow. See additional information on purchasing (**Explanation of Purchase Types Workflow and Inventory** and **Manually Creating a PO Line** of the Acquisitions Guide).
3. Activate the purchased electronic resource. For information on activating a portfolio or an electronic collection, see **Activating Electronic Resources**.

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