

**ExLibris**  
Part of **Clarivate**

**IGOLU**  
*International Group of Ex Libris Users*

# Alma ERM Update

**Noam Fass**

**Alma Product Management**

# Agenda

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ERM Mission



Recent Present and Future



# ERM Mission

# Belgium passport control



# ERM Mission



## Free Time

Automate processes



## Provide Insights

Analysis and alerts



## Accurate Access

Ongoing process



## Customer Delight

Address Idea Exchange



# Recent Present and Future

# ERM Mission



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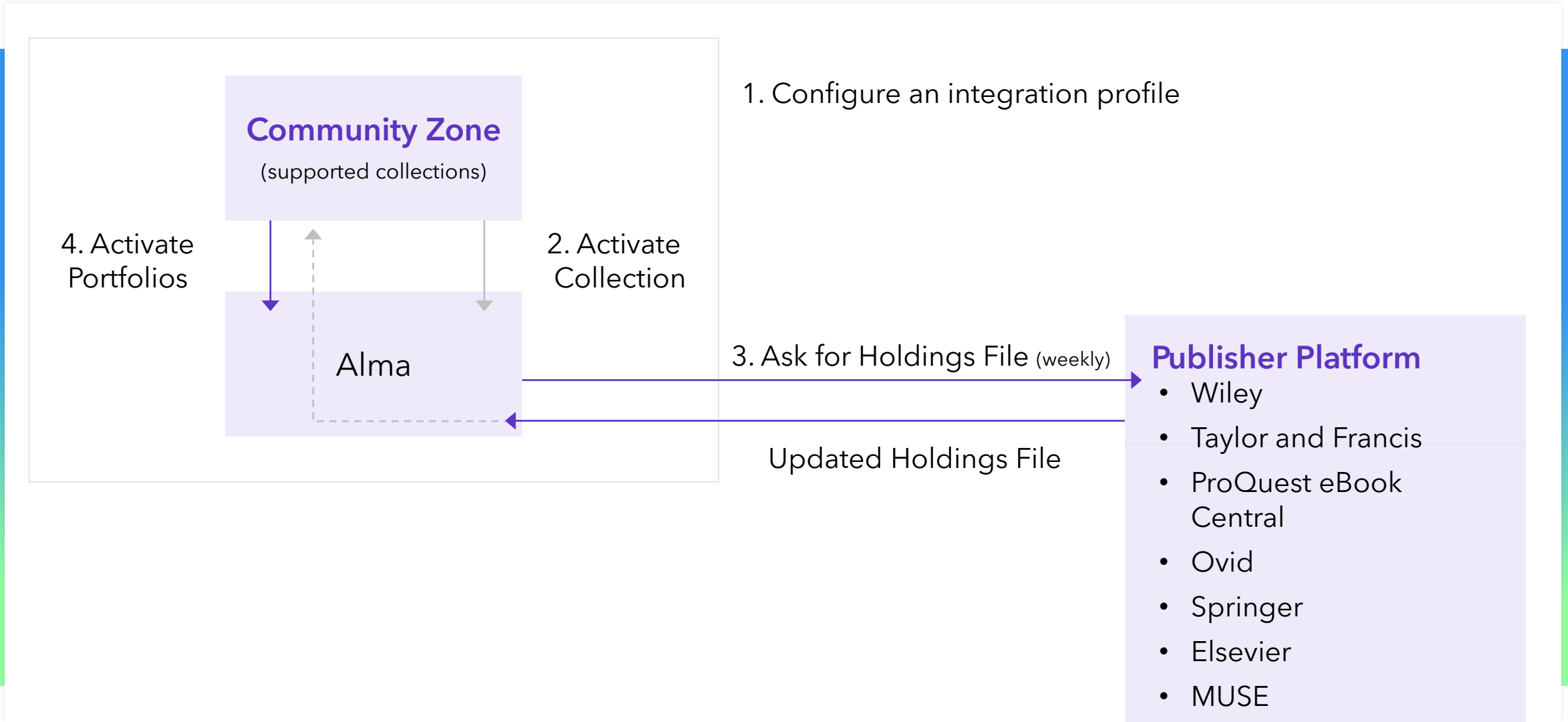


## Free Time - Automate Processes

- [Upload Electronic Holdings from Taylor and Francis](#)
- [Upload Electronic Holdings from Wiley](#)
- [Improved ProQuest eBook Central Upload Electronic Holdings](#)
- [eBook Central Upload Electronic Holdings - Addition of Public Access Model Information](#)
- [Public Access Model to Support Subscription Titles](#)
- [Change Electronic Portfolio Information Job Now Supports the Public Access Model](#)
- [Efficient Management of Electronic Resources Using KBART](#)



# Free Time - Automate Processes: Automatic Upload E-Holdings





# Free Time - Automate Processes Change Portfolio Information

Run a Job - Enter Task Parameters

1 2 3 4 Cancel Back Next

<input type="checkbox"/>	Remove 'Available For' groups	All PASSORD_GRUPPE	
<input type="checkbox"/>	Add 'Available For' groups	All PASSORD_GRUPPE	
<input type="checkbox"/>	Electronic Material Type	Book	
<input type="checkbox"/>	Remove local coverage		
<input checked="" type="checkbox"/>	Set Public access model	Look-up or select	Unconditionally
<input type="checkbox"/>	Set license	Please note that the platform supports patron driven Please note that the platform supports short term loc	Unconditionally
<input type="checkbox"/>	Set PDA	Please note that the platform supports three concurr Please note that the platform supports three concurr	Unconditionally
<input type="checkbox"/>	Delete or replace url's prefix	Please note that the platform supports three concurr with	
<input type="checkbox"/>	Enable proxy	Please note that the platform supports three concurr Please note that the platform supports three year lice	Unconditionally
<input type="checkbox"/>	Set proxy	Please note that the platform supports unlimited acc Please note that the platform supports unlimited acc	Unconditionally
<input type="checkbox"/>	Set availability status	Please note that the platform supports unlimited acc	
<input type="checkbox"/>	Set available from date	Please note that the platform supports unlimited and 66 Concurrent Users(66U)	Unconditionally
<input type="checkbox"/>	Set available until date		Unconditionally



# Free Time - Automate Processes Portfolio Loader Using KBART

Activation Wizard: File Upload

1 2 Cancel Next

Bibliographic

Select catalog  Institution  Network

Select File

Format  Portfolio Loader Format (Excel)  KBART [i](#)

File \*

Select Loading Policy

Loading Policy Type  Complete  Incremental

Select Format

Record Format

Select Action

Add local portfolios

Update portfolios

Delete portfolios

# ERM Mission



## Free Time

Automate processes



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## Provide Insights - Analysis and Alerts

- Usage Reflection for Community Zone Collections
- New Collection Management Level Indication for Community Zone Collections
- Community Zone Updates Task List to Include Indication Regarding Collection Level Management
- Management Level Indication Labeled "Pending Deletion" Added for Community Zone Electronic Collections
- New and Improved Overlap Analysis Tool
- Overlap Analysis Job Supports Physical as well as Electronic Titles
- New field 'COUNTER Platform derived from Interface' for Future Optimization of Cost/Usage Reports
- Option to Delete Portfolios from Community Zone Collections Which are Managed by the Community
- (DARA) Recommendation to Group Local Standalone Portfolios into Collections



# Provide Insights - Analysis and Alerts: Management Level + Usage Reflection

Search in: **Electronic collection** - Zone:  Institution  Community

Electronic Collection: Management lev   Equals     

- Community
- Contributed
- Ex Libris
- Not Maintained
- Pending Deletion

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Portfolio List (10302)   Activate   ...

Europe, Middle East and Africa: 24  
North America & Latin America: 246  
82

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3 **ABC-CLIO Global Perpetual Access**   Portfolio List (5252)   Activate   ...

Collection ID: 61549000000000242   **Management Level:** Ex Libris

MMS ID: 9917564011400041

Type: Selective package

Service: Full Text

Interface name: **ABC-CLIO**

Linking Level: Book

Creation Date: 12/31/2020 11:12

Modification Date: 03/27/2023 01:03

- Asia Pacific: 0
- Europe, Middle East and Africa: 1
- North America & Latin America: 8
- Total Activations: 9

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4 **ABC-CLIO History Reference Online Complete**   Portfolio List (1574)   Activate   ...

Collection ID: 61100000000002513   **Provider coverage:** Yes

MMS ID: 995553824700041   **Search Rights in CDI:** Free

Type: Selective package   **Full Text Rights in CDI:** Subscription (Collection Level)

Service: Full Text   **Full Text Linking in CDI:** Linkresolver

Interface name: **ABC-CLIO**   **CDI Collection ID (DB ID):** JQR

Linking Level: Book   **CDI Type:** Full Text Collection

Creation Date: 02/03/2010 10:19   **CDI Last Market Update:** 12/04/2023

Modification Date: 05/01/2023 01:02   **Management Level:** Ex Libris

Available for CDI search activation




# Provide Insights - Analysis and Alerts: Management Level + Usage Reflection

Electronic Collections (1 - 1 of 1) | where (Management level in Community Zone (Electronic Collection) equals "Pending Deletion")

[Institution](#) [Community](#)

Sort by: Collection name - Asc

1	 <p><b>VIVA Oxford Scholarship Online Ebooks</b> <b>Type:</b> Aggregator package <b>Service:</b> Full Text <b>Interface name:</b> Oxford Scholarship Online <b>Linking Level:</b> Book <b>Creation Date:</b> - <b>Modification Date:</b> -</p>	<p><b>Collection ID:</b> 61386000000000856 <b>MMS ID:</b> 9910737834500041 <b>Management Level:</b> Pending Deletion on 13/07/2023</p> <p><b>Asia Pacific:</b> 0 <b>Europe, Middle East and Africa:</b> 0 <b>North America &amp; Latin America:</b> 0 <b>Total Activations:</b> 0</p>	<p><a href="#">Portfolio List (3439)</a> <a href="#">Activate</a> <a href="#">...</a></p>
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# Provide Insights - Analysis and Alerts: Community Zone Updates Task List

Include indication regarding Collection Management Level

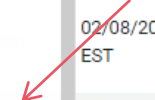
1 - 20 of 250,266

0 rows selected

Report Type: All

Filter: All Has Local Information: All Library Name: All Collection Content Type: All Collection Type: All

	Report Type	Submit Date	Before Change	After Change	Local Information	
1..	<input type="checkbox"/> Portfolio coverage update Electronic Collection 'CDI full text linking' field updated Electronic Collection 'CDI full text rights' field updated Electronic Collection 'CDI search activation' field updated	02/08/2023 14:59:08 EST	Available from 01/01/1999 volume: 45 issue: 1 until 01/31/2020 volume: 66 issue: 4.	Available from 01/01/1999 volume: 45 issue: 1 until 01/31/2021 volume: 67 issue: 4.	-	<input type="button" value="More"/>
2..	<input type="checkbox"/> Portfolio coverage update Electronic Collection 'CDI search rights' field updated Electronic Collection 'CDI type' field updated	02/08/2023 14:59:07 EST	Available from 2008 volume: 1 issue: 1 until 2010 volume: 2.	Available from 06/01/2008 volume: 1 issue: 1.	-	<input type="button" value="More"/>
3..	<input type="checkbox"/> Electronic Collection 'Management Level in Community Zone' field updated Electronic collection bibliographic record update Electronic collection deleted Electronic service base url updated Electronic service deleted	02/08/2023 14:59:06 EST	Ex Libris	Pending Deletion on 08/02/2023	-	<input type="button" value="More"/>
4..	<input type="checkbox"/> Portfolio coverage update Electronic service linking parameters update Portfolio added to auto-active electronic service	02/08/2023 14:59:06 EST	Available from 01/01/1892 volume: 1 issue: 1 until 01/31/2020 volume: 107 issue: 4.	Available from 01/01/1892 volume: 1 issue: 1 until 01/31/2021 volume: 108 issue: 4.	-	<input type="button" value="More"/>
5..	<input type="checkbox"/> Portfolio coverage update Portfolio added to non auto-active electronic service Portfolio bibliographic record updated	02/08/2023 14:59:05 EST	Available from 04/01/2012 volume: 1 issue: 1.	Available from 04/01/2012 volume: 1 issue: 1 until 01/31/2022 volume: 11 issue: 2.	-	<input type="button" value="More"/>







# Provide Insights - Analysis and Alerts: New and Improved Overlap Analysis Tool

## Electronic + Physical Analysis

< Overlap and Collection Analysis (1 - 15 of 15)



Report Name ▾



Sort by: Creation Date ▾



New Analysis ▾



Remove Selected



1  New Report 2022-08-10 11:40:41

Creator UriB613

Compare Collections

Creation Date 08/10/2022 12:40

Compare Collections

### Analysis Report



74 (19.95%) Titles of Portfolios with no overlap

Titles of the Portfolios of the electronic collection selected for comparison (source) that are not part of the electronic collection/s compared with (target)

297 (80.05%) Titles of portfolios with overlap

Titles of the Portfolios of the electronic collection selected for comparison (source) that are part of the electronic collection/s compared with (target)



# Provide Insights - Analysis and Alerts: New and Improved Overlap Analysis Tool

## Electronic + Physical Analysis

Drop a file or [Select or drag an Excel File \(.xlsx or .xls\)](#)

Select the populations you would like to compare the titles from the input file with:\*

- Institution Zone electronic resources (including Community Zone activated electronic resources)
- Community Zone non-activated electronic resources
- Institution Zone physical resources

Additional Details

- Include related titles indication

Choose the report output format\*

- One excel line per match
- One excel line per identifier from input file

# ERM Mission



## Free Time

Automate processes



## Provide Insights

Analysis and alerts



## Accurate Access

Ongoing process



## Customer Delight

Address Idea Exchange



# Customer Delight - Address Idea Exchange

- [Portfolio Loader/Export - Support Split Coverage](#)
- [A New Page Action Save and Test Access Was Added When Creating a New Portfolio](#)
- [Batch Update Electronic Collection Attributes](#)
- [Control the Availability of Portfolios Automatically at a Pre-defined Date](#)
- [Electronic Service - Expiry Date Option for the Service Temporarily Unavailable Message](#)
- [Activation Notes in Electronic Resource Activation Task List](#)

# ERM Mission - Future Perspective



## Free Time

Automate processes

SAGE + EBSCO + Taylor & Francis Journals + Preselect + JSTOR



## Provide Insights

Analysis and alerts

Intuitive CZ updates task list alerts  
Usage indication in overlap analysis tool  
MARC record quality measures for CZ collections



## Accurate Access

Ongoing process

Selected metadata elements in GES



## Customer Delight

Address Idea Exchange

Enhance user experience

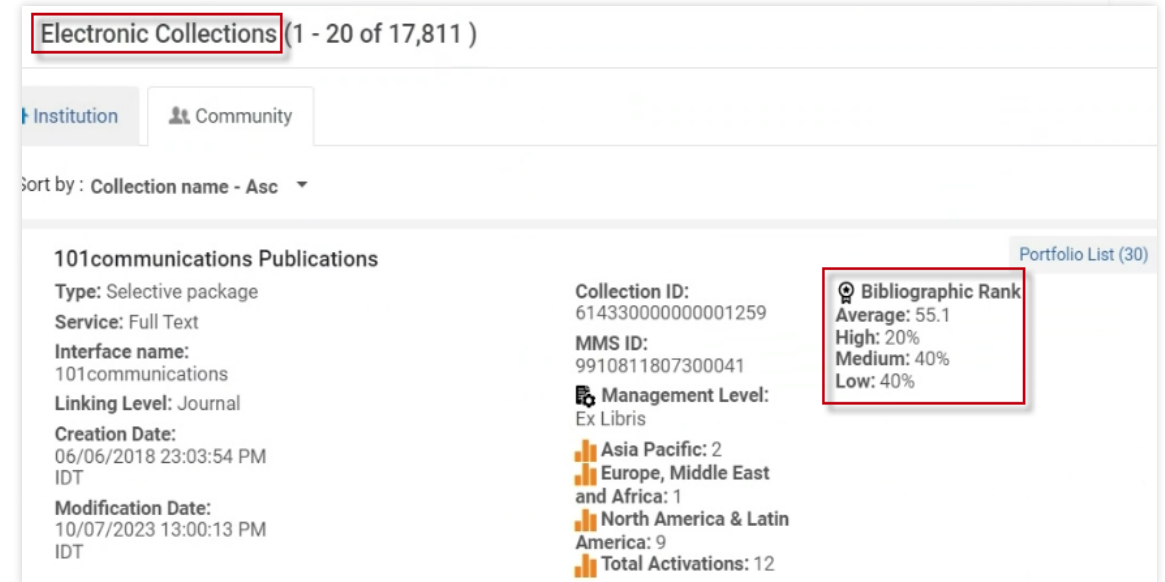
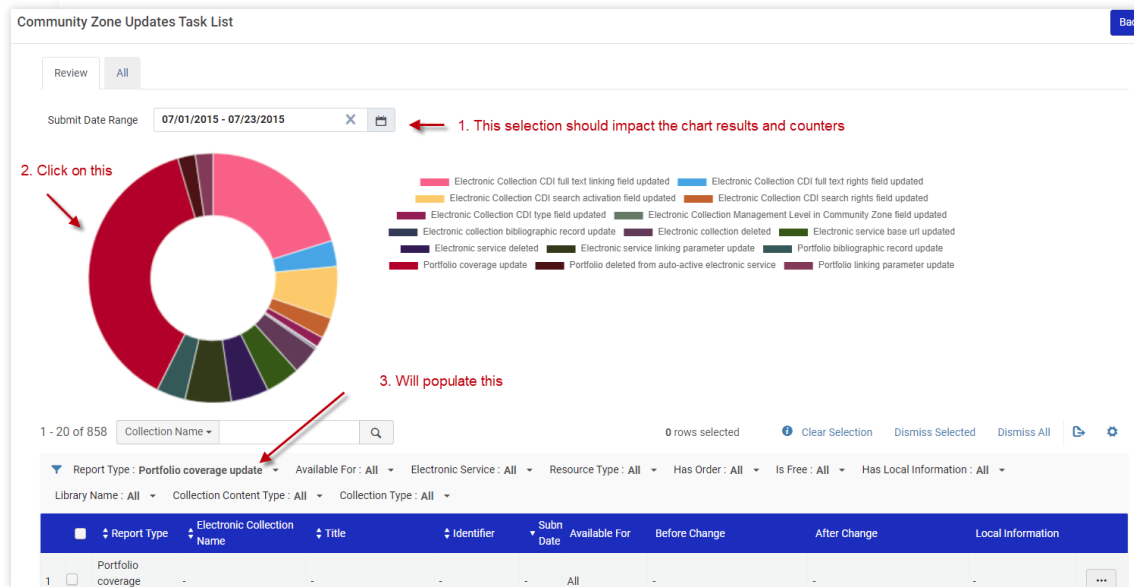
# ERM Mission - Future Perspective



## Provide Insights

Intuitive CZ updates task list alerts

MARC record quality measures for CZ collections



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# ERM Mission - Future Perspective



## Provide Insights

Link Resolver Usage Indication - **Portfolio** search

Link Resolver Usage Indication - **Title** search

Electronic Portfolios Art Save Query

Institution Community

Sort by: Rank Expand

Han'guk misul yon'gam. : Korea art annual. Additional order Resource sharing request

Online: getFullTxt Creation Date: 10/21/2020 17:04 Modification Date: 10/27/2020 13:59 Portfolio ID: 5333789980000121 MMS ID: 991284020000121

Orders: 1

Available For Other details

Related Records	0
Additional Orders	1
Licenses	0
Courses	0
PDA	0
Link resolver usage (access)	5
Link resolver usage (appearance)	24

1 of 662

All Titles 991284020000121 Push Selected to MDE Save and Filter Query

Institution Community

Select All Sort by: Rank Secondary Sort by: Rank 0 rows selected Expand

Han'guk misul yon'gam. : Korea art annual. Edit Record Portfolio List

Journal {Other Serial - Physical} ([Soul] : Han'guk Misul Yon'gam Sa 19uu) Language: Korean Creation Date: 09/15/2011 17:13

Subject: Portraits-Korea-Yearbooks. Modification Date: 06/21/2018 10:08

Orders: 2 Requests: 3 MMS ID: 991284020000121

Digital Other details

Completed requests	2
Publishing information for electronic inventory	5130439830000121
Courses	0
Link resolver usage (access)	10
Link resolver usage (appearance)	37
Reminders	0
Number of in house uses	2
Number of in house uses	8
Year-to-Date Loans	0
Last Loan Date	10/27/2020
Last in house use date	10/27/2020

Source Portfolio Link resolver usage (access) 5 Source Portfolio Link resolver usage (appearance) 24

### OVERLAP ANALYSIS



# Questions? Ask Me Anything!

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# Thank you!

Noam.Fass@clarivate.com

## About Clarivate

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# ERM Mission - Future Perspective



## Customer Delight Enhance user experience

The screenshot displays the Ex Libris ERM interface. It is divided into two main sections: 'Electronic Portfolios' and 'Electronic Collections'. The 'Electronic Portfolios' section shows three items, each with a portfolio ID and a service type. A context menu is open over the first item, listing actions such as 'Edit Portfolio', 'Link to Community', 'Create E-Activation Task', 'Additional Order', 'Test Access', 'Delete', 'Report To Ex Libris', and 'Make Available'. The 'Electronic Collections' section shows one item with a collection ID and name. The interface includes navigation icons like refresh, home, and search, as well as buttons for 'Add Local Portfolio', 'View full list', and 'Generate new search'.



Want to be part of our  
"early adopters" group?

Contact me!

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