

Consortial E-Resources Overview

Background

ALMA presents a completely new Electronic Resource Management (ERM) model for activities which previously have taken place in multiple locations. The ALMA model includes the concept of “zones” in which records are maintained, and to which library holdings can be attached. The Community Zone (CZ) is the overall knowledge base, which could be understood as a combination of bib records and collections (Aggregator, Selective, Databases). The Network Zone (NZ) is the consortial-sharing environment, in which shared packages can be activated for individual libraries in their Institution Zones (IZs), where local holdings are maintained. In addition, unique collections of records can be loaded into the NZ for access by the consortia.

Prior to migration, GALILEO provided access to its consortial e-resource collections through the GALILEO portal, SFX, and EBSCO Discovery Service (EDS). In addition, GALILEO offered services that contain information about local collections, including the GALILEO Local Resource Integration (GLRI) system and SFX.

For the purpose of maintaining e-resources after migration, Alma replaces the SFX and Full Text Finder link resolvers. The GALILEO portal, EDS, and GLRI remain in place.

Summary

In the ALMA environment, there is a single consortial e-resource model for all institutions; that is, the institutional library manages its own locally acquired and licensed e-resources, and GALILEO manages the consortially acquired and licensed e-resources. This document will help define policies and procedures surrounding the activation of resources available in the CZ and NZ and for resources that are not.

Initial Configurations

In order to maintain a consistent approach to how institutions manage e-resources, basic configurations need to be established. The following configurations impact authentication into resources and how services and resources are displayed to the end user.

- **EZproxy:** Half of USG institutions maintain a local instance of EZproxy, while the other half rely on the GALILEO maintained instance of EZproxy for their institution. For this second group, GALILEO will make all EZproxy configurations on their behalf. Both Institutions with local EZproxy and GALILEO will use the [EZproxy Configuration Instructions](#) for configuration guidance.
- **Link Resolver (OpenURL):** Institutions will be responsible for maintaining the Alma OpenURL with vendors that have local agreements with and GALILEO will be responsible for maintaining this URL in GALILEO vendors. In many cases there will be overlap. [Institution's Service URLs \(OpenURLs\)](#)

- **Display Logic:** Configurations define when services appear in the Primo View It and Get It tab, and the order of resources presented. Each institution will determine and establish Display Logic rules that define the display of locally purchased resources in their respective IZ, while GALILEO will establish Display Logic rules in the NZ for the consortially managed resources (EBSCO and ProQuest*) in order to reduce the number of resources listed for a given title. GALILEO will not set Display Logic rules to give one vendor priority over another. [Ex Libris Documentation](#)

Activating/Maintaining Consortial e-resources

Definitions

- **Institutional Collections** – *acquired, licensed and managed by individual institutional libraries.*
- **Consortial Collections** – *acquired, licensed and managed by GALILEO. These resources will be clearly branded as GALILEO. Consortial collections include both “core” collections available to all USG libraries and “cost-share” collections that are provided on an opt-in basis.*

Activation

As mentioned, Institutions manage their own locally acquired and licensed e-resources, and GALILEO manages the consortially acquired and licensed e-resources.

Both GALILEO and institutions alike will activate newly acquired e-resources when available in the CZ. Instructions and a workflow overview for major acquisitions activities is provided on the wiki in either a [poster view](#) or [printable view](#). The flowchart is modular and color coded for easy workflow identification, and contains links to relevant Ex Libris Knowledge Center documentation. This is a work in progress, so changes are to be expected.

When new resources are not available in the CZ or NZ, local collections can be created, utilizing MARC records obtained from the vendor or created locally. Institutions will need to review their e-resource collections and ensure that all local non-ALMA CZ titles/packages are activated within their IZ. Each institution will be expected to follow best practices for inventory creation and inventory control spelled out in the [GIL Libraries Cooperative Cataloging Policies](#).

Review of the CZ packages revealed that some GALILEO consortial eBook and Films on Demand collections will need to be loaded into the Network Zone by GALILEO. GALILEO staff maintains a [list of packages](#) that are consortial activations available and not available from the CZ and the method used to activate.

Maintenance

Ongoing maintenance for consortial and local collections will require GALILEO and institutions to review Ex Libris' [Weekly CKB Updates](#) for new resources added to the Knowledge Base and therefore, available for activation from the CZ.

Support and Troubleshooting

In line with the model for activation and maintenance, institutions are responsible for troubleshooting all locally purchased resources, while GALILEO maintained resources are the responsibility of the GALILEO Staff. GALILEO resources will be branded with the GALILEO Logo to distinguish them from locally managed resources.