

使用Alma管理电子资源

香港大学图书馆的经验分享

HKU's best practices in managing E-
resources using Alma

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CONNIE LAM UNIVERSITY OF HONG KONG LIBRARIES

10-06-2020

香港大学图书馆的电子资源



>8成经费用于购置电子资源



~700万电子书



~9.5万串流音频



~20万电子期刊



~17万串流视频

管理电子资源的经验



- 构建内部数据库管理电子资源的使用许可
- 曾使用Primo的发现服务，对SFX和Alma中服务 (Services)及电子资源库列表(Portfolios)有初步的认识
- 系统迁移，电子资源的记录迁移尚算顺利
- 大部份的电子资源有高素质的书目记录



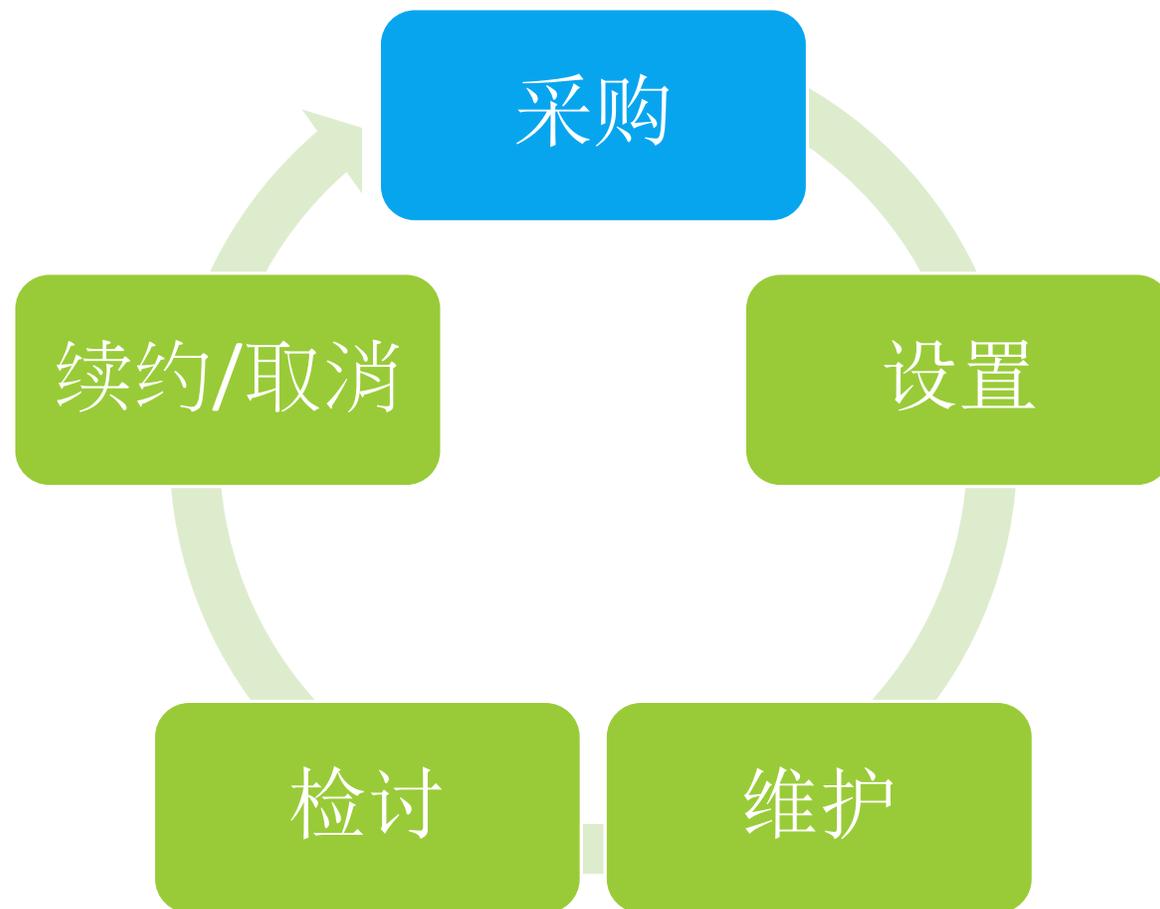
- 未曾电子资源管理系统
- 迁移了Primo的SFX服务器和旧版ILS中的相同记录，因此有大量重复数据要进行删除

电子资源的生命周期

Life cycle of electronic resources



电子资源的生命周期



采购 (Acquisitions)

管理试用 (Managing trials)

Starting and Managing Trials in Alma

先建立订单

< Purchase Order Line Details ... Save and Request Evaluation Defer Order Now Save Back Save and Continue

A new PO line was created . Please review it.

试用 (Trials)

采访> 采购订单行> 管理试用 Acquisitions>Purchase order lines>Managing trials

Alma ★ >> Acquisitions Resources Fulfillment Admin Analytics 📍 👤 🗨️

All titles Keywords 🏠 🔍 Advanced

< Trial Details Cancel Save

Orbis. ℹ️ ▼

| | | | | | |
|--------|--------|------|--------|------------------|------------|
| Status | Closed | Type | Public | Reference number | ██████████ |
|--------|--------|------|--------|------------------|------------|

Summary Survey Form Participants Analysis Alerts Attachments Notes

DETAILS

| | | | |
|--|--|---------------------|--|
| Name * | Orbis. | Title | Orbis. |
| Start Date * | 11/10/2017 ✕ 📅 | End Date * | 25/10/2017 ✕ 📅 |
| Remind participants before trial ends (days) | 1 | Available to public | <input checked="" type="checkbox"/> |
| Contact | ██████████ ✕ ☰ | | |

Participant Page URL [Copy to clipboard](#)
[View Form](#)

ANALYSIS AND RESULT

| | | | |
|---------------|-----------------------------------|-------------------|--|
| Result | Mostly recommended ▼ | Result Date | 30/10/2017 ✕ 📅 |
| Result Reason | ▼ | Purchase Decision | Yes ▼ |

Add question

Type *

Look-up or select

Question *

Scale Of Satisfaction

Yes or No

Free Text

Multi choice

Single choice

Comment Label

+ Add from list

+ Add question



| Type | Question code | Mandatory | Comment | |
|-----------------------|---------------|-------------------------------------|---------|-----|
| Scale Of Satisfaction | | <input checked="" type="checkbox"/> | | ... |
| Free Text | | <input checked="" type="checkbox"/> | | ... |
| Yes or No | | <input type="checkbox"/> | | ... |
| Yes or No | | <input type="checkbox"/> | | ... |

订购 (Order)

- 电子书: 已和Gobi系统集成, 故在Gobi系统上订购的同时, 已可以在Alma生成订单行

ORDER ACKNOWLEDGEMENT

Title: SOCIAL MEDIA AND THE PUBLIC INTEREST: MEDIA REGULATION IN THE DISINFORMATION AGE.
Author: NAPOLI, PHILIP M
Publisher: COLUMBIA UNIVERSITY PRESS
Pub Year: 2019
Binding: eBook
Content Level: ADV-AC
LC Class: PN4766.N36 2019
Subject Headings: SOCIAL MEDIA AND JOURNALISM.
YBP Interdisciplinary Topics: Communication; Computer; Mass Media; Public Policy; Sociological
Approval Note: AUTH: DUKE UNIVERSITY. EXAMINES NEED TO GOVERN SOCIAL MEDIA SIMILAR TO NEWS MEDIA.
Geographic Focus: US
Faculty Affiliation: Duke University
Language: English

ISBN: 9780231545549

YBP Order Key: [REDACTED]

Place of Publication: NEW YORK
Country Of Origin: US
Pagination: 282 P.
YBP Select: Research-Essential

NON-RETURN/NON-CANCEL YBP

[library open order \(6/2/2020\)](#)
[Gobi open \(5 Books/14 Slips\)](#)
[alternate ed \(19/15\)](#)
[library activity \(15/15\)](#)



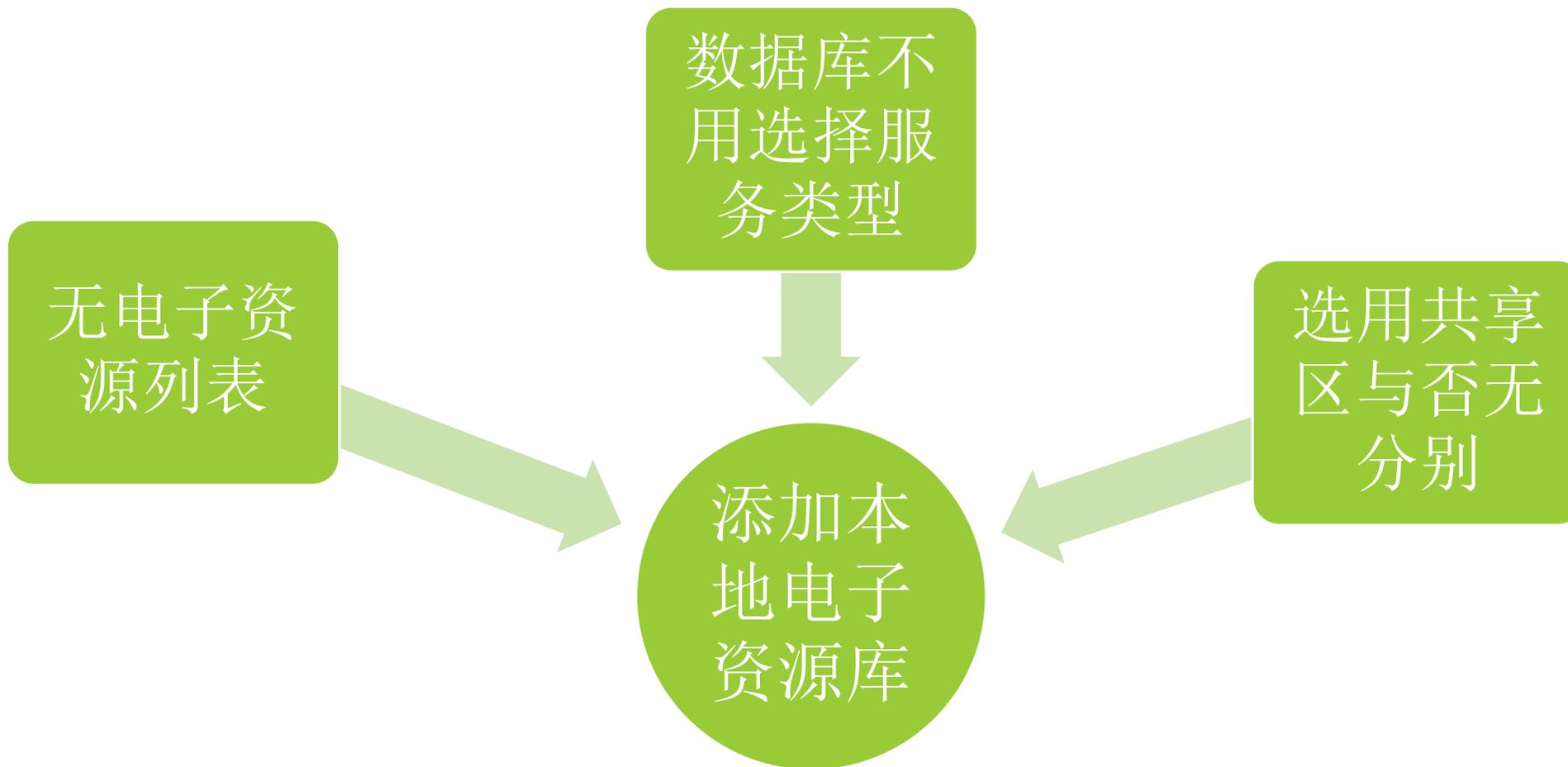
Library History

Title: SOCIAL MEDIA AND THE PUBLIC INTEREST: MEDIA REGULATION IN THE DISINFORMATION AGE.
Author: NAPOLI, PHILIP M
Pub Year: 2019

ISBN: 9780231545549
Binding: eBook

| Action | Date | Qty | Descriptor | Subaccount | Fund/ Other | PO# | Initials | Submitted By | Invoice# | Tracking# |
|-----------------------|----------|-----|--------------|------------|-------------|----------------|------------|--------------|------------|------------|
| Order | 6/2/2020 | 1 | US PUB EBOOK | [REDACTED] | [REDACTED] | p60 [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |

数据库 (Databases)



资源包 (Packages)

从共享区记录创建并激活
本地电子资源库



- 资源存在于共享区
- 及书目记录元数据合适

添加本地电子资源库



- 资源不存在于共享区
- 或书目记录元数据不合适

界面名称 (Interface name)

Vendor General Details

Name * EBSCO International Inc.

Code *

Additional code

Financial Sys. code

National tax ID

Status Active

Liable for VAT

Currencies

Language English

Libraries The University of Hong Kong

Vendor Type Material Supplier/Subscription Agent Access Provider Licensor Governmental

Accounts

| Active | Account Code | Description | Discount Percent | Libraries |
|--------|--------------|-------------|--------------------------|---------------------------------|
| 1 | ✓ | vebss | EBSCO International Inc. | 0.0 The University of Hong Kong |

Interfaces

| Active | Interface Name | Description |
|--------|----------------|-------------|
| 1 | ✓ | EBSCOhost |

选择访问提供者，出现界面区域

Electronic Collections (1 - 20 of 56) | ebSCOhost

Save Query  Institution Network Community

Sort by: Rank ▾

Search scope: Institution ▾



1

**GIDEON****Type:** Database**Interface name:** EBSCOhost**Creation Date:** 25/03/2020 16:49:21 HKT**Modification Date:** 25/03/2020 16:58:38 HKT**Collection ID:**

61590602280003414

MMS ID: 991044220996703414

Edit Collection

Descriptive Record

[Other details](#)

2

**MAS Ultra School Edition Reference book collection****Type:** Aggregator package**Services:** Full Text (Available from: 02/09/2019)**Interface name:** EBSCOhost**Creation Date:** 03/09/2019 14:26:18 HKT**Modification Date:** 20/05/2020 17:25:15 HKT**Collection ID:**

61575232240003414

MMS ID: 991020252189703414

Portfolio List (286)

Edit Collection

[Other details](#)

3

**SMART imagebase****Type:** Database**Interface name:** EBSCOhost**Creation Date:** 06/08/2018 11:40:04 HKT**Modification Date:** 20/05/2020 17:26:42 HKT **Orders:** 1

Edit Collection

Descriptive Record



使用许可管理 (Managing License)

Westlaw Asia / Westlaw International i

Creation date 15/08/2016 Created by SYSTEM License type

Summary License Terms Inventory PO Lines Amendments Group Settings Administrators History Notes Attachments

Name * Westlaw Asia / Westlaw International

License status Active

Signed by

Second party's Signed by

Start date * 11/11/2011

License location ACQ Department (not listed)

License URI LICENSE

License code * LIC

Licensor

Signed on

Second party's Signed on

End date

License review status Accepted

Licensing agent Select from a list

可上载协议, 方便查阅

订单一目了然

Collection name Westlaw Asia

Collection ID

Provider package code (DB id)

MMS ID

- Electronic Collection Description
- General
- Additional
- Notes
- History

Summary and Inventory Information



Type Selective package

Interface name Westlaw

Interface Description

Services Full Text

Process type -

Access type Current

COUNTER Platform

Acquisitions and License Information



PO Line

Activation date 10/08/2017

License Westlaw Asia / Westlaw International

PO Line details

Expected activation date

View license details Westlaw Asia / Westlaw International



在资源库可查阅使用许可

+ Add Additional PO Line



JOURNAL

Archbold review (Online)

London : Sweet & Maxwell 2010

Westlaw

[Online access](#) >

资源库中个别的图书/期刊都有使用许可的显示

TOP

SEND TO

VIEW IT

DETAILS

LINKS

Send to



EXPORT BIBTEX



CITATION



PERMALINK



PRINT



E-MAIL



ENDNOTE
DESKTOP



ENDNOTE WEB

View It

1 - 1 of 1

Full text available at: [Westlaw Asia](#)

Available from 2010.

SHOW LICENSE ▼

License Terms

Walk in User Note: Current HKU staff, students and HKU SPACE borrowers and readers. No other users allowed.

Authorized remote access: Current HKU staff and students, HKU SPACE borrowers



ARTICLE / multiple sources exist. [see all](#)



Management of Septic Arthritis Following Anterior Cruciate Ligament Reconstruction: A Review of Current Practices and Recommendations

Sonnery-Cottet, Bertrand ; Thauinat, Mathieu ; Archbold, Pooler ; Issartel, Bertrand
Journal of the American Academy of Orthopaedic Surgeons, 2014, Vol.22(5), pp.271-273

 PEER REVIEWED

[Full text available](#)  >

TOP

SEND TO

VIEW IT

DETAILS

LINKS

CITATIONS

Send to



EXPORT BIBTEX



CITATION



PERMALINK



PRINT



E-MAIL



ENDNOTE
DESKTOP



ENDNOTE WEB

View It

1 - 1 of 1

Full text available at: [Journals@Ovid full text](#) 

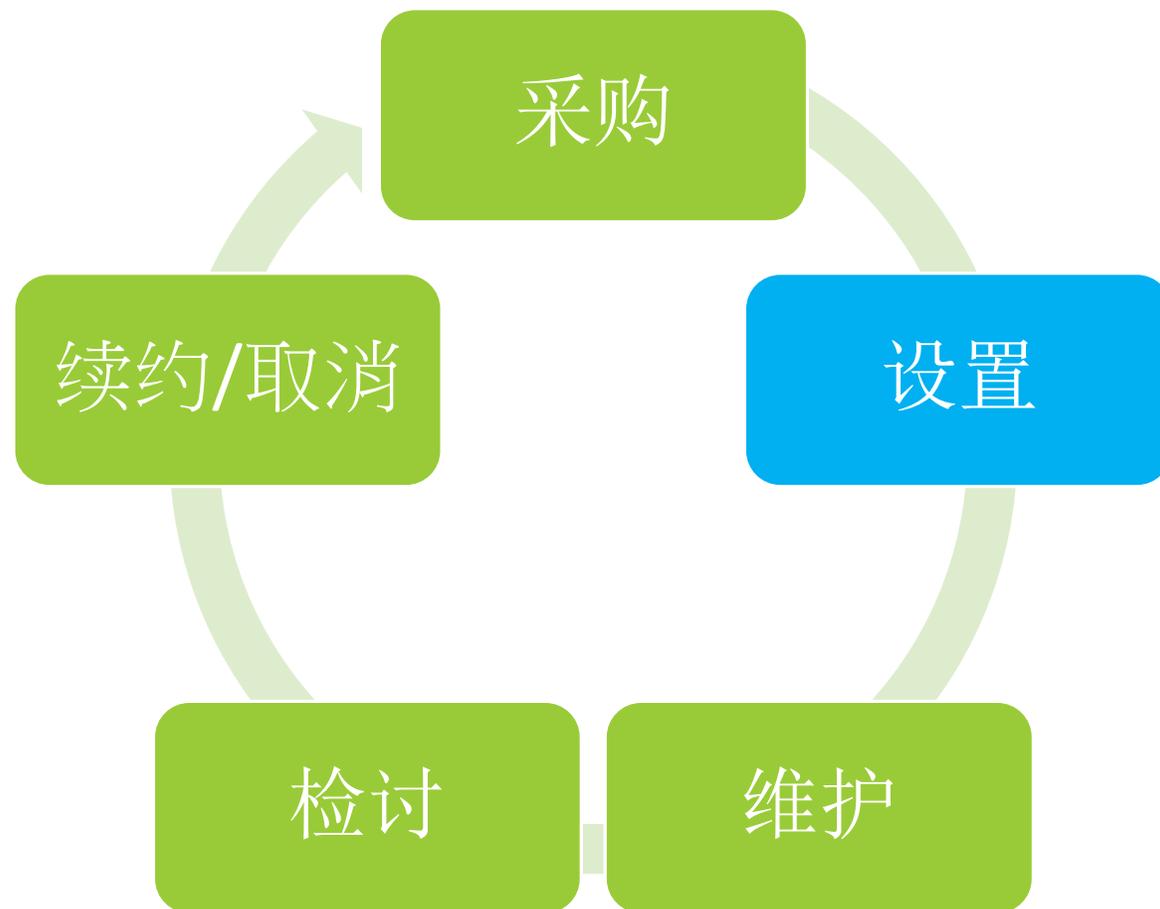
Available from 1993 volume: 1.

HIDE LICENSE ^

License Terms

Authorized remote access: Current HKU staff and students, Circle of Friends, HKU SPACE

电子资源的生命周期



代理 (Proxy)

Collection name ScienceDirect. Collection ID [redacted]
Service type Full Text Service ID [redacted] View all services
Provider package - code (DB id) MMS ID [redacted]

Activation Service Description Linking Portfolios Notes History

General Linking Information

Parser ELSEVIER::SCIENCE_DIRECT
Parser (override)
Parser parameters host=https://www.sciencedirect.com/science/ & prefsite =
Parser parameters (override)
URL type Dynamic URL Parser Parameters
Linking level Article
Service is free? Not Free Free
Crossref supported Yes No
Crossref enabled No Yes INHERIT

Proxy enabled No Yes
Proxy selected Resolver Proxy

General Linking Coverage

Parser (service level) ELSEVIER::SCIENCE_DIRECT
Service parser parameters host=https://www.sciencedirect.com/science/ & prefsite = sd & shib=\$\$SHIBBOLETH & u_shib=\$\$U_SHIBBOLETH
Parser parameters (override) jkey=10621458
parser parameters -
URL type Static URL Dynamic URL Parser Parameters

Proxy enabled No Yes
Proxy selected Resolver Proxy

Electronic Collection Information

Source
Source ID
Creator
Alternative title
Level URL https://www.sciencedirect.com/
Level URL (override)
Is free? Not Free Free

Proxy enabled No Yes
Proxy selected Resolver Proxy

代理关系

| 电子资源库级别启动的代理 | 服务级别启用的代理 | 资源库列表级别启用的代理 | 启用的代理设置结果 |
|--------------|-----------|--------------|---|
| N | N | N | 重定向到资源 |
| N | N | Y | 重定向到代理登录 |
| N | Y | N | 重定向到代理登录 资源库列表继承服务设置 |
| N | Y | Y | 电子资源库不继承服务或资源库列表的代理设置。如果在服务级别选择代理配置文件，资源库列表继承服务级别的代理设置。要设置资源库列表级别的代理，将服务级别设置的 所选代理 字段留空。 |
| Y | N | N | 重定向到资源 电子资源库代理不会由服务或资源库列表级别继承 |
| Y | N | Y | 重定向到代理登录 |
| Y | Y | N | 重定向到代理登录 资源库列表继承服务设置 |
| Y | Y | Y | 重定向到代理登录 |

资源库中的详细书目

机构区

I-Zone

共享区

C-Zone

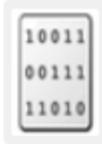
选择性资源包 (Selective packages)>机构区

○图书资源包 (Book packages)

- 采购时要求供货商提供书单及书目纪录
- 批量导入书目纪录, 同时建立资源库列表, 使用静态链接

○期刊资源包 (Journal packages)

- 采购时要求供货商提供书单及书目纪录
- 逐一查重, 编目及建立资源库列表
- 为达至期刊论文层级的检索, 使用解析器参数 (parser parameter)
- 建立服务时设定解析器及参数
- 参考[SFX目标和Alma电子资源库配置指南](#)
- 参考共享区相同资源包的配置



Elsevier ScienceDirect Journals

Type: Selective package
Service: Full Text
Interface name: Elsevier ScienceDirect

Linking Level: Article, Article

Creation Date: 03/02/2010 20:19:31 HKT
Modification Date: 01/06/2020 06:30:11 HKT

In CDI: Yes
Search Rights in CDI: Free
Full Text Rights in CDI: Subscription (Linkresolver)
Full Text Linking in CDI: Linkresolver
Collection ID: 61110983570089325
MMS ID: 995553732300041

1



ScienceDirect.

Type: Selective package
Services: Full Text (Available from: 16/07/2017 until: 16/07/2021)
Interface name: Elsevier ScienceDirect

Linking Level: Article

Creation Date: 25/06/2017 17:56:54 HKT
Modification Date: 31/10/2019 14:17:53 HKT

Identifier: 2212-6716
Creation Date: 03/02/2013 20:31:45 HKT
Modification Date: 17/12/2017 09:53:59 HKT

Portfolio ID: 53338000000000482
Service ID: 62100000000001270
Collection ID: 61110983570089325

Activate

Linking Information



Portfolio Linking Information

Parser (service level)

ELSEVIER::SCIENCE_DIRECT

Parser parameter

host=https://www.sciencedirect.com/science/ & prefsite = sd & shib= & u_shib= & url = https://doi.org & url2 = https://www.sciencedirect.com&uis=22126716

URL (Static or Dynamic)

<https://www.sciencedirect.com/science/journal/22126716>



Activation

Service Description

Linking

Portfolios

Notes

History

General Linking Information

Parser

ELSEVIER::SCIENCE_DIRECT

Parser (override)

Parser parameters

host=https://www.sciencedirect.com/science/ & prefsite = sd & shib= & u_shib= & url = https://doi.org & url2 = https://www.sciencedirect.com

Parser parameters (override)

URL type

Dynamic URL Parser Parameters

Linking level

Article

Service is free?

Not Free Free

Crossref supported

Yes No

Crossref enabled

No Yes INHE

Proxy enabled

No Yes

Proxy selected

Resolver Proxy

General

Linking

Coverage

Acquisition

Notes

Related Portfolios

History

Parser (portfolio level)

ELSEVIER::SCIENCE_DIRECT

Service parser parameters

host=https://www.sciencedirect.com/science/ & prefsite = sd & shib= & u_shib= & url = https://doi.org & url2 = https://www.sciencedirect.com

Parser parameters (override)

uis=24681253

parser parameters

-

URL type

Static URL Dynamic URL Parser Parameters

Proxy enabled

No Yes

Proxy selected

Resolver Proxy

Test access

整合资源包 (Aggregator packages)

○机构区

- 供货商定期提供更新讯息
- 供货商提供优质书目纪录
- 或资源包的内容不多 (一千以下)
- 如共享区未有相关资源包, 只能在机构区建立

○共享区

- 找到相同的资源包
- 供货商未有定时提供更新

共享区

开放存取资源库 (Open Access Collections)

- 尽量利用
- 激活全部内容
- 激活以后添加内容

数据库, 但在共享区 CDI 显示为 在纪录中全文链接



British Standards Online

Type: Database

Creation Date: 16/12/2019 11:31:58 HKT

Modification Date: 02/02/2020 23:54:41 HKT

Collection ID: 6114025280000041

MMS ID: 997471910700041

In CDI: Yes

Search Rights in CDI: Free

Full Text Rights in CDI: Subscription
(Collection Level)

Full Text Linking in CDI: Link in record

Activate

Activate for Search in CDI

CDI - Central directory index

即使在机构区建置资源库, 激活CDI检索

1

Oxford University Press Journals
Type: Selective package
Service: Full Text
Interface name: Oxford University Press
Linking Level: Article, Article
Creation Date: 03/02/2010 20:19:31 HKT
Modification Date: 30/03/2020 02:56:50 HKT

In CDI: Yes
Search Rights in CDI: Free
Full Text Rights in CDI: Subscription (Linkresolver)
Full Text Linking in CDI: Linkresolver
Collection ID: 61110974981684524
MMS ID: 995553662100041

Portfolio List (490) Activate ...
Activate for Search in CDI
Descriptive Record
Order
Report To Ex Libris

Oxford University Press Journals
Type: Selective package
Services: Full Text (Not Available)
Interface name: Oxford University Press
Linking Level: Article
Creation Date: 09/03/2020 21:00:25 HKT
Modification Date: 09/03/2020 21:00:26 HKT

In CDI: Yes
Active for Search in CDI: Yes
Search Rights in CDI: Free
Full Text Rights in CDI: Subscription (Linkresolver)
Full Text Linking in CDI: Linkresolver
Collection ID: [REDACTED]
MMS ID: [REDACTED]

Edit Collection Descriptive Record

记录导入 (Import records)

配置文件类型

仓储 (Repository) – 书目记录。用于导入书目信息并创建采购订单和电子馆藏

资源 > 导入 > 管理导入配置文件或采访 > 导入 > 管理导入配置文件 (**Managing import profile**)

< Import Profile Details

Save Draft

Cancel

Save

Profile Details

Normalization & Validation

Match Profile

Set Management Tags

Inventory Information

Profile Details

Use Network Zone

No

Profile name *

Load E-Book record

Profile description

Load E-book record

Originating system *

Other

File name patterns

Import Protocol

Upload File/s

Cross walk

Yes

No

Physical source format

Binary

Encoding format

UTF-8

Source format

MARC21 Bibliographic

Target format

MARC21 Bibliographic

Status

Active

Load E-Book record

Profile Type

Repository

Profile Details

Normalization & Validation

Match Profile

Set Management Tags

Inventory Information

Match Profile

Match by Serial / Non Serial

Yes No [i](#)

Serial match method

024 / 035 Match Method [i](#)

Non Serial match method

024 / 035 Match Method

用024/035匹配, doi 在 024, 因OCLC号, 资源包的题目控制号均在035

Match Actions

Handling method

Automatic Manual [i](#)

Upon match

Merge Overlay Do Not Import Import New Record [i](#)

Single match - match only record with the same inventory type (electronic/physical)

MERGE/OVERLAY

Merge method

Merge except All

Select Action

Allow bibliographic record deletion

Do not override/merge a record with lower brief version

Electronic Mixed Physical None

E-Book Mapping



Delete/deactivate portfolios

Portfolio type Standalone Part of an electronic collection

Electronic Collection *

Service *

Material type

Single portfolio Multiple portfolios

Create inventory only for new bibliographic records

Extract portfolio information from field

Extract access URL from subfield

Extract internal description note from subfield

Default internal description note

Extract authentication note from subfield

Default authentication note

Extract public note from subfield

Default public note

Indicators to skip (use # for empty indicator)

035控制号 (035 control no.)

| | | |
|--|-----|--|
| | 005 | 20191107162841.0 |
| | 006 | m o d |
| | 007 | cr# |
| | 008 | 190927s2018 ch a ob 000 0 chi d |
| | 020 | _ z 9789869623827 |
| | 020 | _ z 9869623824 |
| | 035 | _ a (hyread)181354 |
| | 035 | _ a (OCoLC)1121445234 |
| | 040 | _ a HUA b eng e rda c HUA |
| | 041 | 1_ a chi h eng |
| | 050 | _4 a RC521 |
| | 082 | 04 a 616.83 2 23 |
|  | 098 | _ a RC521 |
| | 100 | 1_ a Valenzuela, Michael J., e author. |
| | 240 | 10 a Maintain your brain. Chinese |
| | 245 | 10 a 遠離記憶盡頭的腦科學 : b 面對失智的勇氣 = Maintain your brain / c 麥可·華倫祖拉著 ; [譯者, 游仁]. |
| | | 10 a Yuan li ji yi jin tou de nao ke xue : b mian dui shi zhi de yong qi = Maintain your brain / c Maike. Hualunzula zhu ; [yi zhe, You Ren]. |

监控导入 (Monitor import)

Bibliographic Records Imported

| | Count | |
|----------------------------------|-------|-----|
| 1 Total records imported | 34 | ... |
| 2 Imported records upon no match | 33 | ... |
| 3 Unlinked from CZ | 0 | ... |
| 4 Merged records | 1 | ... |
| 5 Merged records (manually) | 0 | |
| 6 Overlaid records (manually) | 0 | |
| 7 Overlaid records | 0 | |
| 8 Newly added records | 0 | ... |
| 9 Newly added records (manually) | 0 | ... |
| 10 Record redirections | 0 | ... |
| 11 Headings calculated | 329 | |

Preview records
Create itemized title set
Download sources (XML)
Download sources (binary)

供货商的书目记录

● 西文供货商

- 一般会提供OCLC的书目记录
- 如提供的书目记录无控制号,匹配时选用ISBN/024/035匹配方法

● 中文供货商

- 一般提供的书目记录未能符合我馆要求,故必要求Excel书单
- 先查重
- 如馆藏已有相关书目记录
 - 在Excel记录MMS ID
 - 利用MMS IS 及URL,编制简单书目记录,导入并生成资源库列表
- 如馆藏无相关书目记录
 - 在OCLC进行编目
 - 批量导入记录,并生成资源库列表

供货商书目记录质量不理想

一般会进行编目

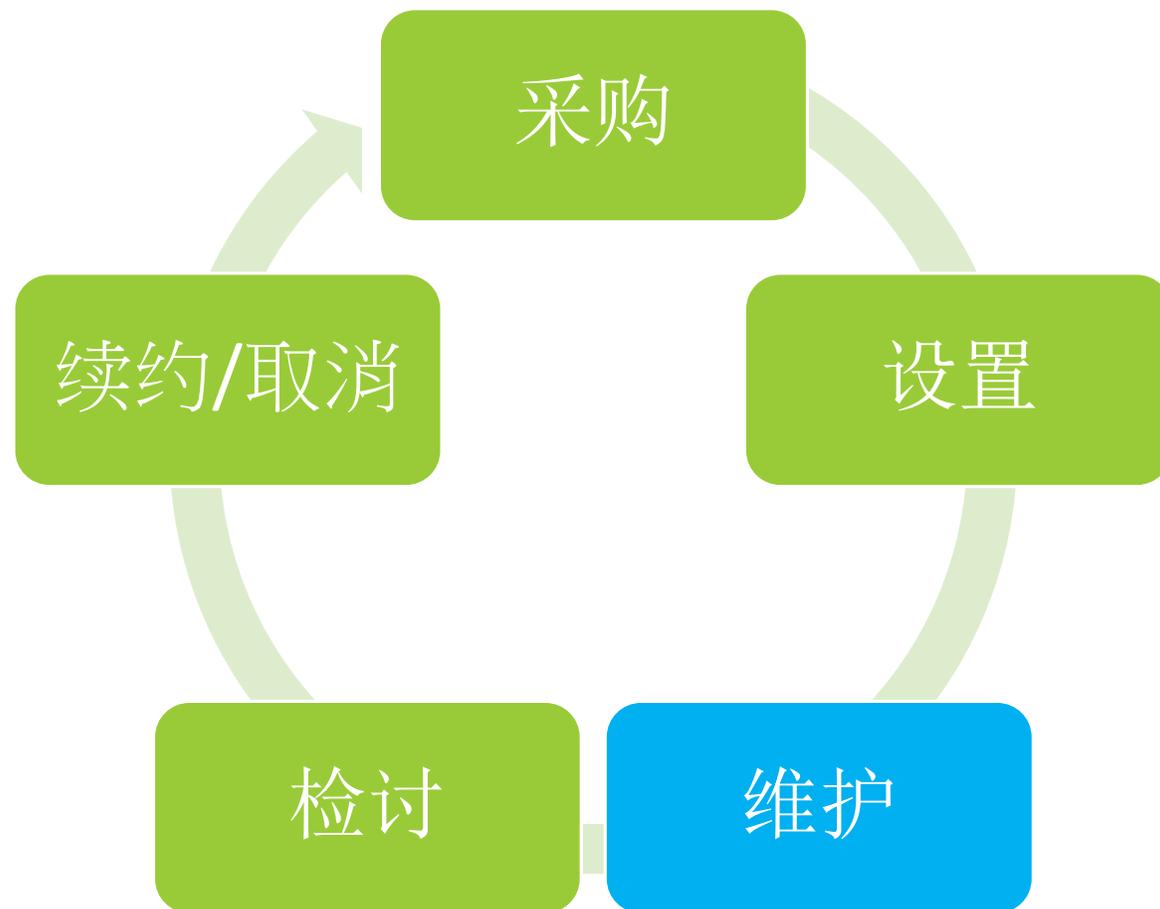
但

- 数据库的内容太多,难以进行编目
- 共享区有相关资源库 → 共享区

采购方式为需求驱动方式

- 使用供货商的书目记录
- 如购入相关图书,会更新书目记录

电子资源的生命周期



内容更新 (Content updates)

整合资源包时有内容更换

- 量小 → 手动更新
- 量多 → 导出资源库列表 → 配对要移除的内容 → 利用导入资源库列表进行批量移除

The screenshot displays the 'Electronic Service Editor' interface. At the top, there are 'Cancel' and 'Save' buttons. Below this, a metadata section shows details for 'ScienceDirect books EBS program', including Collection ID, Service ID, and MMS ID. A navigation bar includes tabs for 'Activation', 'Service Description', 'Linking', 'Portfolios', 'Notes', and 'History'. The 'Portfolios' tab is active, showing a search bar with '1 - 20 of 2,210' results. Action buttons include 'Move Set of Portfolios', 'Activate/Deactivate', 'Load Portfolios' (highlighted with a green box), '+ Add', and '- Delete Selected'. A dropdown menu is open for 'Load Portfolios', showing options: 'Extended Export' (highlighted with a green box), 'Excel (current view)', and 'Excel (all fields)'. Below the menu, a table lists content items with columns for Availability, Identifier, Title, Coverage, and Material Type. The first row shows a book titled '13th International Symposium on Process Systems Engineering : PSE 2018, July 1-5 2018 / edited by Mario R. Eden, Marianthi G. Ierapetritou, Gavin P. Towler.' with a 'BOOK' material type.

Electronic Service Editor

Collection name: ScienceDirect books EBS program
Service type: Full Text
Provider package code (DB id): -
Collection ID: 61548081340003414
Service ID: 62548081330003414
MMS ID: 991021072559703414
View all services

Activation | Service Description | Linking | **Portfolios** | Notes | History

1 - 20 of 2,210 | ISBN | [Search] | Move Set of Portfolios | Activate/Deactivate | **Load Portfolios** | + Add | - Delete Selected | [Export] [Settings]

Status: All | CZ Linking: All | COUNTER Platform: All

| | Availability | Identifier | Title | Coverage | Material Type |
|---|--------------------------|--------------------------------|--|----------|---------------|
| 1 | <input type="checkbox"/> | 🏠 978044464... | 13th International Symposium on Process Systems Engineering : PSE 2018, July 1-5 2018 / edited by Mario R. Eden, Marianthi G. Ierapetritou, Gavin P. Towler. | - | BOOK |

Extended Export
Excel (current view)
Excel (all fields)

ScienceDirect books EBS program

Type Selective package
Number of portfolios 2210
Electronic Collection Level URL -
Additional descriptive information -

Bibliographic

Select catalog Institution Network

Select File

File *



Select Loading Policy

Loading Policy Type Complete Incremental

Select Action

Choose Operation

Delete

Handling bibliographic records without inventory

Look-up or select

Do nothing

Delete bibliographic record(s)

Suppress bibliographic record(s)

Select Validation Policy

Validate online
 Validate offline - Recommended for large files

链结更新 (Url updates)

- 使用解析器参数的资源库
 - 只需在服务层面更新链接, 无需处理资源库列表
- 使用静态链结的资源库
 - 链结的开首更新
 - 制作集合 → 在既定集合上运行批量作业更新
 - 链结的开首及结尾均有改动
 - 导出资源库列表 → 在Excel 上改动 → 利用导入资源库列表进行批量更新
 - 链结完全改变
 - 需要求供货商提供新旧链结
 - 导出资源库列表 → 在Excel 上配对及改动 → 利用导入资源库列表进行批量更新

服务层面更新链接 (Url updates on Service level)

General Linking Information

Parser ELSEVIER::SCIENCE_DIRECT

Parser (override)

Parser parameters host=https://www.sciencedirect.com/scienc-/ & prefsite = sd & shib= & u_shib= & url = https://doi.org & url2 = https://www.sciencedirect.com

Parser parameters
(override)

URL type Dynamic URL Parser Parameters

链接的开首更新 (Updates of URL prefix)

<http://www.springer.com/openurl.asp?genre=book&isbn=978-3-642-15293-1>

改成

<https://link.springer.com/openurl.asp?genre=book&isbn=978-3-642-15293-1>

先将资源库列表建立结果集 → 在既定集合上运行批量作业 → 更改电子资源库列表信息

| | | | | |
|-------------------------------------|--------------------------------|--|------|--|
| <input type="checkbox"/> | Set PDA | Select from a list | | Unconditionally |
| <input checked="" type="checkbox"/> | Delete or replace url's prefix | <input type="text" value="http://www.springer.com"/> | with | <input type="text" value="https://link.springer.com"/> |
| <input type="checkbox"/> | Enable proxy | <input type="radio"/> No <input type="radio"/> Yes | | Unconditionally |

导入资源库列表 (Portfolios)进行批量更新

Bibliographic ▼

Select catalog Institution Network

Select File ▼

File * 

Select Loading Policy ▼

Loading Policy Type Complete Incremental

Select Action ▼

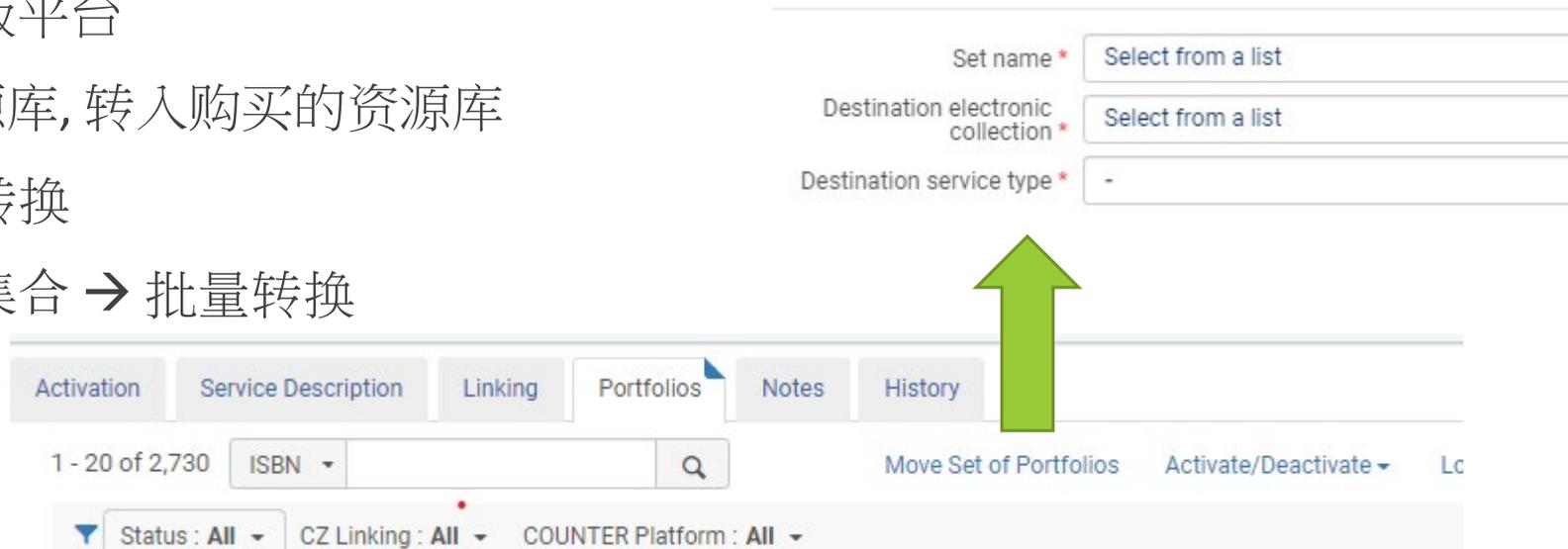
Add local portfolios 

Update portfolios 

Delete portfolios 

转换资源库 (Moving portfolios)

- 错误存入资源库, 需要改正
- 资源库整合 (例如: MyiLibrary, ebrary 并入 ebook library 成为 Ebook central)
- 期刊转换出版平台
- 由DDA的资源库, 转入购买的资源库
- 量少: 人手转换
- 量多: 制作集合 → 批量转换



The screenshot shows a web interface for managing portfolios. The 'Portfolios' tab is selected, and a green arrow points to the 'Move Set of Portfolios' button. The form includes the following fields:

- Set name *
- Destination electronic collection *
- Destination service type *

Below the form, the interface shows a search bar with '1 - 20 of 2,730' results, a search button, and filter options for Status (All), CZ Linking (All), and COUNTER Platform (All).

公告 (Public messages)

在服务 Service

- 设定资源库暂停服务讯息
- 在公共备注 (public note) 中列写的讯息
- 资源库列表的所有题名在Primo中均可显示

Activation Service Description Linking Portfolios Notes History

Service activation status Not Available Available

Active from date 16/07/2017 X

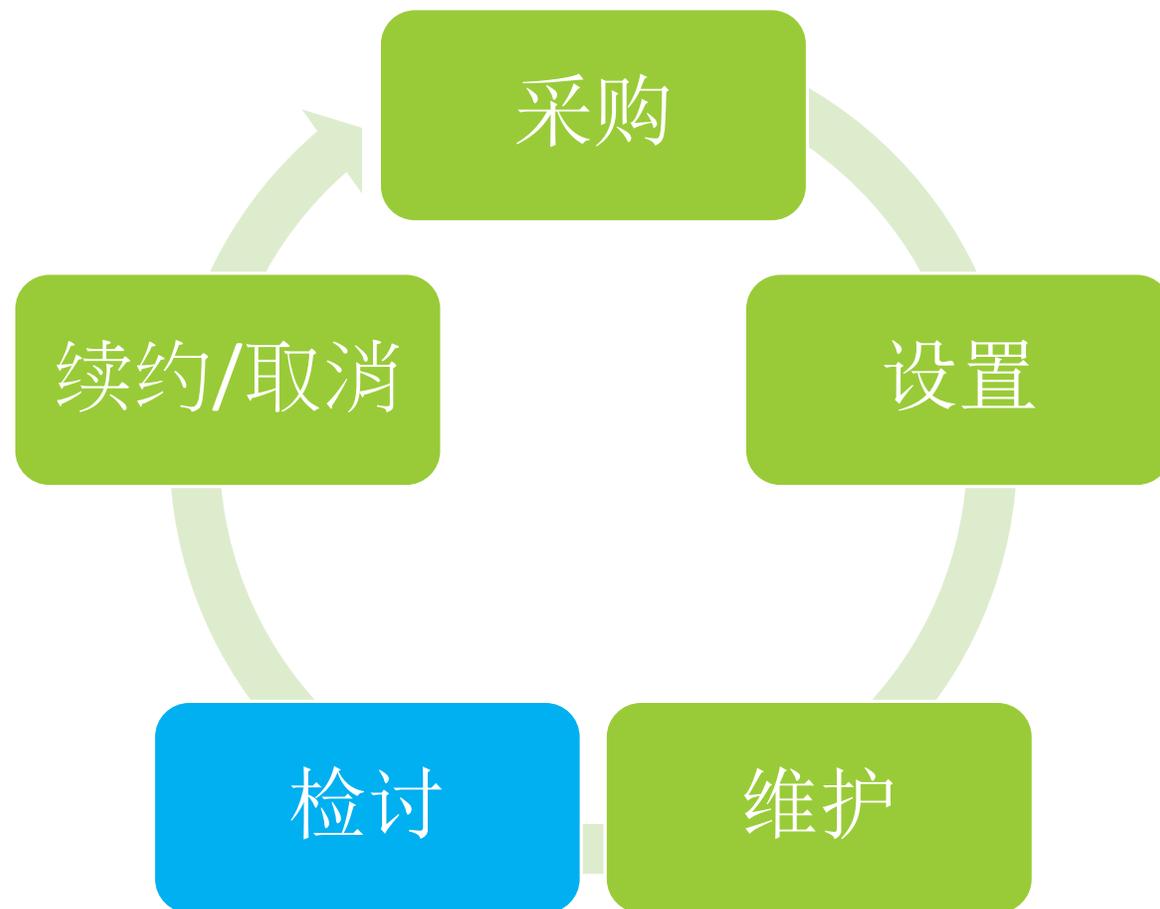
Active until date 16/07/2021 X

Service temporarily unavailable message No Yes

Service unavailable message as of date

Service unavailability reason

电子资源的生命周期



使用数据 (Usage data): COUNTER

符合COUNTER的使用数据, 有助分析和理解其机构内的使用情况

- 一个机构拥有一个名为机构名的订阅者
- 先在(配置菜单 > 采访 > 总体 > 订阅者) 中配置订阅者

| Subscribers | | | | | | | | |
|--|-------------------------------------|-----------|--|--|-------------------------------------|----------------------|--------------|--|
| Table code | Subscribers | | | Table Description | Subscribers | | | |
| Managed in Network | No | | | | | | | |
| Customization mode: | Entire table needs to be customized | | | | | | | |
| Import + Add Row | | | | | | | | |
| Enabled | Move Up | Move Down | Code | Description | Default Value | Updated By | Last Updated | |
| 1 | <input checked="" type="checkbox"/> | | <input type="text" value="University of Hong Kong"/> | <input type="text" value="University of Hong Kong"/> | <input checked="" type="checkbox"/> | <input type="text"/> | 31/12/2019 | |

SUSHI账户

- SUSHI账户使Alma能够从供应商处自动检索COUNTER报告。
- (采访 > 采访基础 > 供应商 > 使用数据)
 - 为每个供应商和每个报告类型创建一个SUSHI帐户
 - 单个供应商可能需要多个SUSHI帐户，每个报告类型一个。
 - SUSHI收割 . 从所有激活的SUSHI账户收集所有COUNTER数据。
 - 也可将供应商通过其他手段提供COUNTER数据，手动上传到Alma

Vendor code

SUSHI account type Release 5

Account Identifier



SUSHI Account * **SAGE Journals**

Status **Active**

Vendor URL **https://journals.sagepub.com**

Override URL

Subscriber * **University of Hong Kong**

Contact Information

Request Details



Requester ID

Requester Name

Customer ID

Customer Name

User Name

Password

Requester Email

API Key

Usage Report Types



1 - 3 of 3

[+ Add Report Type](#)



| | Active | Report Type | Description | COUNTER Release | |
|----|-------------------------------------|-------------|--|-----------------|--|
| 1. | <input checked="" type="checkbox"/> | tr_j1 | COUNTER 'Journal Requests (Excluding OA_Gold)' [TR_J1] | R5 | |
| 2. | <input checked="" type="checkbox"/> | tr_j3 | COUNTER 'Journal Usage by Access Type ' [TR_J3] | R5 | |
| 3. | <input checked="" type="checkbox"/> | tr | COUNTER 'Title Master Report' [TR] | R5 | |

1 - 20 of 55

Load File ID



Upload File



Status: All Files Subscriber: All Upload Date: All Uploaded Report Type: All SUSHI Account: All Clear all

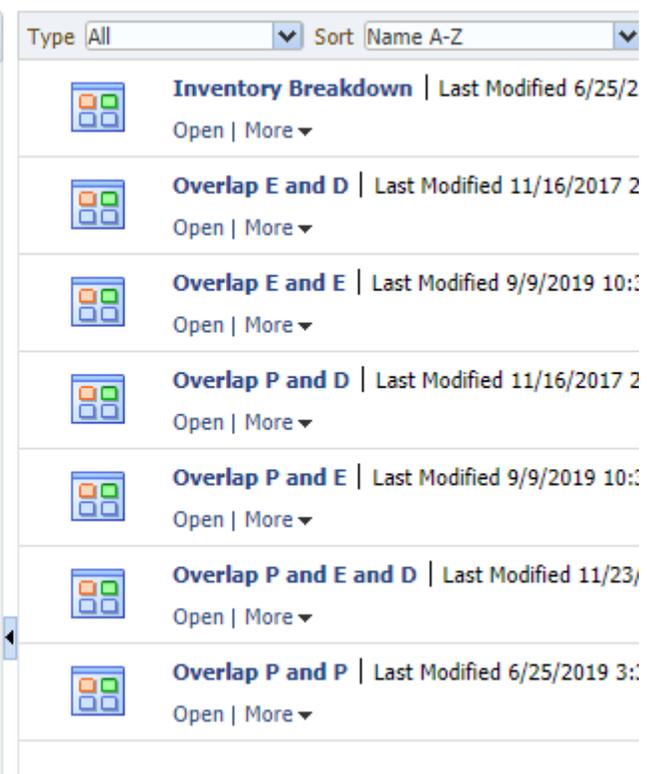
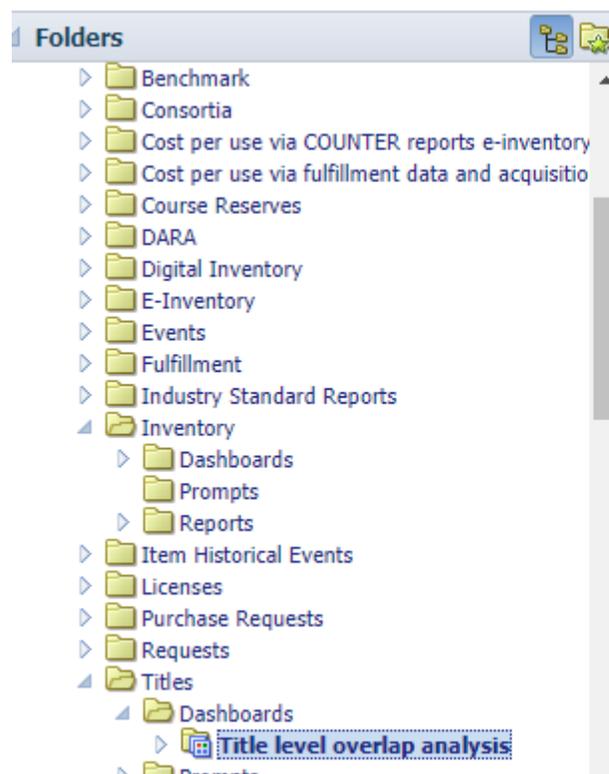
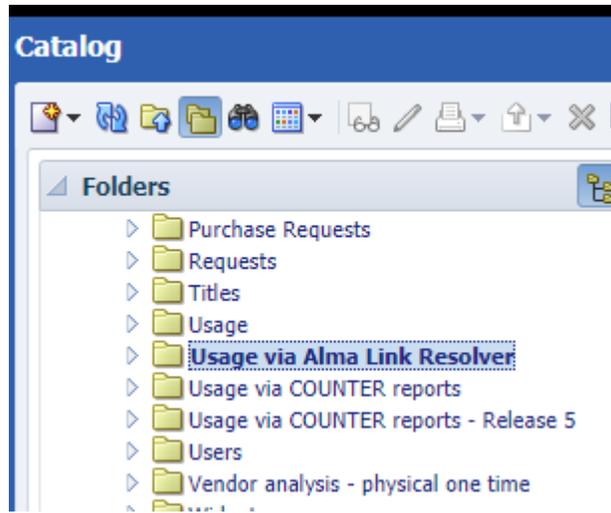
| File Name | SUSHI Account | Upload Date | Uploading User | Subscriber | Status | Status Descript | Report Type | Data Start Date | Data End Date | Vendor URL | Report Success Rate (Global) |
|------------------------------|---------------|----------------------|---|-------------------------|-----------------|-----------------|-------------|-----------------|---------------|---------------|--|
| 1 Sushi_SAGE Journals_tr_... | SAGE Journals | 01 Jun 2020 15:07:32 | Sushi Scheduler | University of Hong Kong | Fully processed | - | tr:R5 | Jan 2020 | May 2020 | https://jo... | Yearly: 0.0% Half-Year: 0.0% Quarterly: 0.0% |
| 2 Sushi_SAGE Journals_tr_... | SAGE Journals | 01 Jun 2020 15:03:47 | PO Line package job | | | | | | | | |
| 3 Sushi_SAGE Journals_tr_... | SAGE Journals | 01 Jun 2020 15:01:46 | Status <input type="radio"/> Active <input checked="" type="radio"/> Inactive PO Line continuous limit * <input type="text" value="1"/> PO Line one time limit * <input type="text" value="100"/> Package PO Line by Fund <input checked="" type="checkbox"/> Schedule <input type="text" value="Every day at 17:00"/> <input type="button" value="Run Now"/> | | | | | | | | |
| 4 Sushi_SAGE Journals_tr_... | SAGE Journals | 01 Jun 2020 15:00:21 | SUSHI harvesting job Status <input type="radio"/> Active <input checked="" type="radio"/> Inactive Schedule <input type="text" value="Every Saturday at 04:00"/> <input type="button" value="Run Now"/> <input type="button" value="Email Notification"/> | | | | | | | | |

SUSHI harvesting job

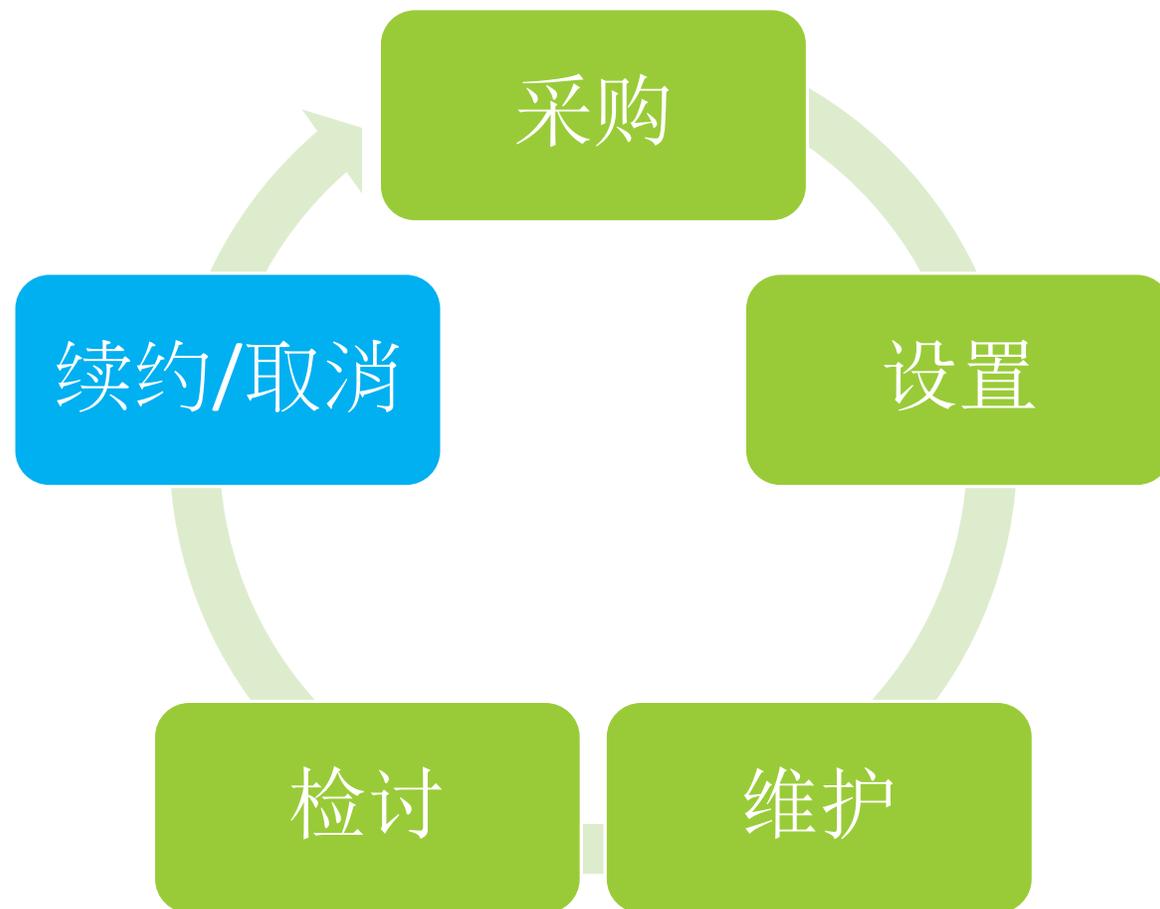
Status Active Inactive

Schedule

分析报告 (Analytics)



电子资源的生命周期



续约 (Renewal)

可以在订单中设定续约提示

| | | | |
|------------------------|--|--------------------------------|------------|
| Note to vendor | VEN. NOTE: 8 June, 2000+ Non-subs titles | number | - |
| Renewal ▼ | | | |
| Manual renewal | Yes | | |
| Subscription from date | 01/01/2020 | Subscription to date | 31/12/2020 |
| Renewal date | 30/12/2020 | Renewal reminder period (days) | 60 |

取消 (Cancellation)

可以在资源库层面, 一次移除所有相关资源库列表及书目纪录

Delete confirmation



Please note: The Portfolios deletion process is about to delete 14,809 portfolios by a background process. An email will be sent upon completion.*

Handling
bibliographic
records without
inventory

🔍 Look-up or select

Do nothing

Delete bibliographic record(s)

Suppress bibliographic record(s)

新领域

与外部系统集成, 上载电子馆藏

| | | |
|---------------|---|---|
| <p>上传电子馆藏</p> | <p>上传和更新Elsevier电子馆藏。</p> <p>上传和更新Ovid电子馆藏。</p> <p>从ProQuest Ebook Central上传和更新电子馆藏。</p> <p>上传来自Springer的电子馆藏</p> | <p>从Elsevier上传电子馆藏</p> <p>从Ovid上传电子馆藏</p> <p>从ProQuest Ebook Central上传电子馆藏</p> <p>上传来自Springer的电子馆藏</p> |
|---------------|---|---|

我馆的分工

馆藏发展部 及各学科主任

- 筛选
- 评估试用及购买决定
- 审定使用许可

采购部

- 与供应商联系
- 安排试用
- 订购/续订/取消
- 议定使用许可
- 要求所有相关信息, 包括书单, 书目记录
- 使用统计

我馆的分工

编目部

- 选定共享区/机构区资源库
- 建立本地资源库及服务
- 书目纪录
- 资源库列表的建立/更新

系统部

- 提供技术支持
- 在代理服务器设置相关讯息

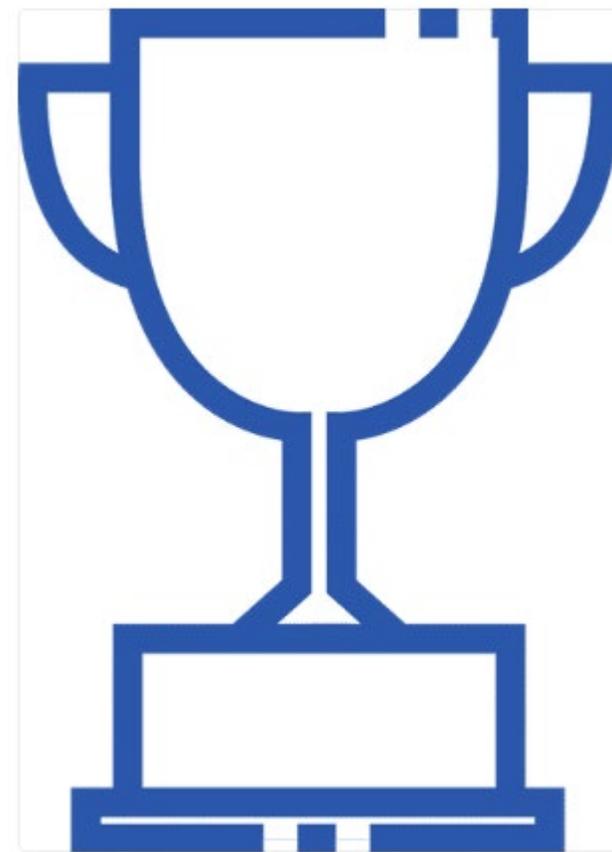
需要多少人手

決定因素

- 图书馆的大小
- 馆藏多少
- 读者的需要
- 对书目记录的要求

小结

- 我馆在很多方面都在探索和学习
- 没有一个方法可以在所有图书馆适用
- 采用最能配合本馆资源及读者需要的方法,就是最佳实践



谢谢!

csllam@hku.hk

