

# Placement of Electronic Resources in Alma

## Introduction

This policy establishes guidelines on where bibliographic records for electronic resources should be placed within the Ex Libris Alma architecture. This policy applies to all staff members of Washington Research Library Consortium (WRLC) institutions who work in Alma.

## Background

When WRLC migrated to Alma in July 2018, most electronic resource records from Voyager and Sierra were placed in the Network Zone (NZ), which is the shared catalog. This immediately caused a problem because member institutions do not have access to electronic resources held by other member institutions. The only electronic resources that can be accessed by all libraries are those which were acquired as a consortium; these are managed by WRLC in the NZ. All other institution-specific electronic resources are not shared and therefore do not belong in the shared catalog. Furthermore, the presence of other institutions' electronic resources confused patrons, who were frustrated or confused by not being able to access some ejournals, ebooks, and other electronic resources. At that time, it was not possible to limit the display of electronic resources in Primo VE by owning institution. Therefore, all institutions unlinked their records from the NZ so that they only resided in the proper Institution Zone (IZ).

During migration, electronic resources from Serials Solutions were activated in the Community Zone (CZ), which is a knowledge base of shared records for electronic resources that can be used by all Alma customers. Staff have also been activating electronic resources in the CZ since migration completed. These CZ records also go to the NZ, even though they are for non-shared electronic resources. It is not feasible for staff to unlink these records from the NZ (as they did with other migrated records) because that also breaks the link to the CZ.

## Policy

1. All bibliographic records for shared electronic resources acquired by WRLC must reside in the NZ.

2. All bibliographic records for non-shared electronic resources acquired by individual institutions:
  1. Must reside in the IZ if that institution loads the records from a vendor, OCLC, or any source other than the CZ.
  2. May reside in the NZ if that institution has activated them in the CZ.
    1. These records may not be edited, merged, or overlaid in the NZ; instead, all changes must be made in the CZ.
    2. If an institution finds the CZ records to be low quality or inaccurate, the institution may create its own record in its IZ.

# Approval

Approved by Electronic Resource Committee on 8/27/20.

Approved by Metadata Committee on 8/28/20.

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