

# Shared Open Access E-Resource Collections Workflow

Involved Parties: CCC APAC NZ Manager ERC

## NEW RESOURCES

Requests from any library for new open access electronic resources to be added to Primo should be directed to Coordinated Collections Committee (CCC).

1. For each requested resource, CCC gathers input on which libraries are interested in opting in (“participating libraries”) and communicates in/out decisions to Alma/Primo Advisory Committee (APAC). Report should include resource name, URL, brief description, and decisions of all WRLC members (IZ level - need 14 responses).
2. If only one library is interested in a particular OA resource, activation of this resource should be directed back to the appropriate IZ. (See Regular Review section for potential future reevaluation.) If more than one library is interested, APAC directs the E-Resource Committee (ERC) to investigate.
3. Network Zone Manager checks on availability in the Alma Community Zone (CZ) and evaluates the catalog record quality and provides a brief report to ERC. Report should include: resource name, URL, brief description, participating libraries, CZ record number. ERC prepares a response with approval to move forward or, if not, itemizes specific reservations that need to be addressed.
4. APAC reviews ERC response and makes a decision either to move forward or to wait for discussion of reservations. APAC directs NZ Manager to proceed with activation.
5. NZ Manager activates the collection in the NZ, with configuration set for the participating libraries. NZ Manager tests access on behalf of participating IZs. NZ Manager configures SUSHI collection (if applicable) and provides access to usage statistics to participating libraries. NZ Manager notifies APAC when completed.
6. APAC notifies CCC and ERC of successful activation.
7. CCC publicizes new shared OA collections at home libraries and in WRLC Newsletter. CCC maintains list on WRLC Intranet of all shared OA collections that have been added. See Regular Review section.

# REGULAR REVIEW

Each year, ERC prepares list of OA resources that are already activated in each IZ. Those with more than 4 libraries and with an overall Brief Level over 6 are prioritized and then submitted into the new resource workflow for reactivation as NZ resources.

Each year, CCC examines current shared OA list and offers libraries the opportunity to reevaluate decisions on opt-in or opt-out.

1. Any requests for changes are communicated to APAC.
2. APAC directs NZ Manager to make appropriate changes.
3. NZ Manager makes changes and communicates completion to APAC.
4. APAC notifies CCC and ERC.
5. CCC revises shared OA list.

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