

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.
 3. Consistent with this policy, individual institutions may link from a shared electronic resource in the NZ to a “local discovery collection”* in order to highlight or promote specific electronic titles.
 1. Linking an NZ-level bibliographic record to a local discovery collection does not create a ^{portfolio} in the IZ or a corresponding holdings record for the institution in the NZ.
 2. The Alma IZ link icon (house symbol) will now display for the linked bibliographic record in the NZ, indicating that the NZ-level bib and portfolio are linked to one or more local discovery collections.**
 3. Deleting a shared electronic resource from a local discovery collection will only remove the link within that local discovery collection.
 4. It is the responsibility of the individual institution to maintain the accuracy of their local discovery collections. Institutions should bear in mind that the availability of specific titles within WRLC shared collections is subject to change without notice.

* In an attempt to more clearly identify these collections, we have adopted the term “local discovery collection”. ExL uses the terms collection or sometimes “local collection”, to distinguish these from “electronic collections” in Alma. These local collections, which may include a combination of digital, print, and electronic titles, are managed in Alma at the IZ level, (see Resources >> Manage Inventory >> Manage Collections) and displayed in Primo VE through the collections menu item, or can be linked via a collection-specific URL.

In addition, ExL uses the term “discovery collection” for a facet that breaks down CDI analytics in Primo VE by CZ electronic collection. As such, please note that this facet does not function to identify these “local discovery collections”, rather it seems to apply only to CDI entries in a blended search profile (one that includes articles).

**The NZ-level bibliographic and portfolio information for individual titles in WRLC-provided shared collections selected by an institution are indexed directly into that institution's discovery layer. In this case, the IZ selections are attached to the collection-level record in the NZ (showing as “available for”), rather than to individual titles. As such, the house symbol does not show up next to

the title in the NZ unless the title is also linked from the IZ with local holdings (against this policy) or, now, as part of a “local discovery collection” (in compliance with this policy).

[See Managing Collections documentation.](#)

[See Adding NZ titles to a local collection in the Alma May 2025 highlights.](#)

Approval

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

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