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INTERLIBRARY SHARED RESOURCES IN INTOTA

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Agenda

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- Interlibrary Shared Resources Model (ISR) in Intota

- Consortium Manager and Sharing Resources

- Consortium Members and Inheriting Resources

- Duplicate Resources

- Sharing and Inheritance (Management) Report

- Helpful Support Center Documentation

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Interlibrary Shared Resources (ISR)

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- ISR is a pay-for service that facilitates supports your e-resource management workflows and organization
- ISR offers the ability to share resources amongst profiles of two or more libraries that work collectively
- Simplifies e-resource management:
  - Centralized acquisition & management of e-resources
  - Negotiate better pricing, licensing rights
  - Lower cost, improved accuracy
- Member libraries have more flexibility – they can choose the e-resources that they want to keep in their collections and/or turn on for discovery

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Intota ISR Model
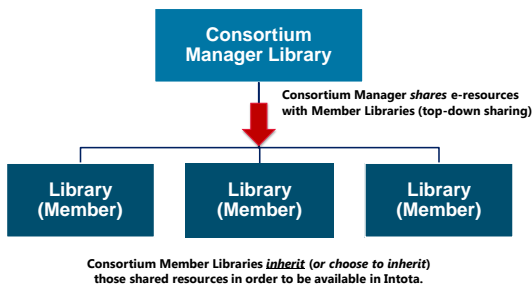
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Consortium Manager Library

Consortium Manager *shares* e-resources with Member Libraries (top-down sharing)

Library (Member)   **Library (Member)**   **Library (Member)**

Consortium Member Libraries *inherit* (*or choose to inherit*) those shared resources in order to be available in Intota.
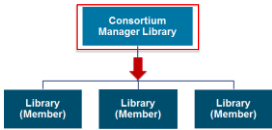

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Consortium Manager Library — ProQuest

- Acquires e-resources on behalf of it's member libraries
- Manages collection of Tracked Databases
- Manages License negotiation, terms and rights
- "Shares" Databases and Licenses with Member Libraries in the Client Center or in Intota

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Consortia Manager Accounts & Permissions — ProQuest

Permissions

Save Cancel

Sharing Permissions

| Share Data Management | None | View | View/Edit |
| Share Licensing | None | View | View/Edit |

- **Sharing Permissions for Consortium Manager Accounts**
  - *Share Data Management* - Allows a user from the "manager" library to share Databases with other "member" library profiles.
  - *Share Licensing* - Allows a user from the "manager" library to share Licenses with other "member" library profiles.

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Viewing Consortium Member Libraries — ProQuest

Admin
- Library Settings
- Menu Settings
- Google Scholar
- User Accounts
- View Recent Updates
- Resource Sharing

ADMINISTRATIVE
- Resource Sharing
- Menu Settings
- Management Reports
- Vendor Statistics Management
- E-Journal Portal Admin Console
- Cost Data Upload
- 360 Link Admin Console
- Summon Admin Console
- Ulrichsweb Admin Console

- From the Consortium Manager's profile, use the Admin Menu or in the Administrative section on the Intota Home Page and click on **Resource Sharing** to view Consortium Members (Member Details).

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Viewing Consortium Member Libraries

ProQuest

Member Details

Member Name ▲	Institution ▲	Date Added
*AMS TEST LIBRARY 6	*AMS TEST LIBRARY 6	09/28/2010
*ERM Test Library	*Greenlake University	01/08/2009
Test Hybrid Consortia Library 1		01/15/2009

- Consortia Manager can view Consortium Members Details, institution name and the date when they were added to the consortium in Intota.
- Consortia Members must be added by PQ Support.

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Viewing Shared Resources

ProQuest

Member Details

Member Name ▲	Institution ▲	Date Added
*AMS TEST LIBRARY 6	*AMS TEST LIBRARY 6	09/28/2010
*ERM Test Library	*Greenlake University	01/08/2009
Test Hybrid Consortia Library 1		01/15/2009

- Click on the name of the Member library from the Member Details to view the "Resource Sharing" page
- Share or view already-shared Databases and Licenses with Members

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Sharing Databases with Members

ProQuest

Resource Sharing

*AMS TEST LIBRARY 6

Auto Accept	Locked	Date Added
On	Off	09/28/2010

*AMS TEST LIBRARY 6
*ERM Test Library
Test Hybrid Consortia Library 1

Databases   Licenses

Filter by Status: All   Filter by Provider: All   Reset Filters   **Save**

Shared	Database Name ▲	Status ▲	Provider ▲	Titles	Code	Date Shared
	3.3 test 2	Cancelled	Library Specific Holdings	110 of 110	QMU	
	3.4 Book DB	Subscribed	Library Specific Holdings	2	IF1	
	a new da	Subscribed	Library Specific Holdings	493	OMK	
	A regression for 305	Subscribed	Library Specific Holdings	1	1K4	
	AAA	Subscribed	Library Specific Holdings	10	9K7	
	ABI Complete (Turkish Consortium) (Legacy Platform)	Subscribed	ProQuest	0	PAI	
	ABI Inform Global	Subscribed	Library Specific Holdings	0	1L7	
	ABI/INFORM	Subscribed	OCLC	0	CAB	08/16/2011
	ABI/INFORM Archive	Subscribed	ProQuest	137	M04	
	ABI/INFORM Archive (Alumni Edition)	Subscribed	ProQuest	133	H94	
	ABI/INFORM Complete (Legacy Platform)	Subscribed	ProQuest	0	PAC	06/08/2011
	Academic OneFile	Subscribed	Gale	4,898 of 7,630	IA0	10/02/2014

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Sharing Licenses with Members

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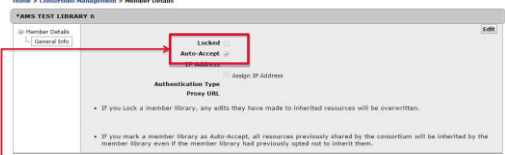- Helpful Support Center Documentation

Consortium Members

- Member libraries may "inherit" resources from Manager Libraries – Databases and Licenses – that are "shared" to them by Manager Libraries

Resource Inheritance Configuration (Members)

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- The Consortium Manager Library controls members' inheritance configuration.
  NOTE: Members cannot configure this themselves – must be done through PQ Support.

Home > Consortium Management > Member Details

*AMS TEST LIBRARY 6

Edit

Member Details
General Info

Locked
Auto-Accept

IP Address
Assign IP Address
Authentication Type
Proxy URL

- If you Lock a member library, any edits they have made to inherited resources will be overwritten.

- If you mark a member library as Auto-Accept, all resources previously shared by the consortium will be inherited by the member library even if the member library had previously opted not to inherit them.

Locked - members cannot edit Database Details (metadata) in inherited databases

Auto-Accept - members <u>automatically</u> inherit shared resources from Manager

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Member Library Accounts & Permissions

ProQuest

Permissions

Save Cancel

Sharing Permissions

Inherit Data Management	None	View	View/Edit
Inherit Licensing	None	View	View/Edit

- **Sharing Permissions for Consortium Member Accounts**

  - *Inherit Data Management* - Allows a user from the "member" library to inherit (add) Databases shared by the Manager Library

  - *Inherit Licensing* - Allows a user from the "member" library to inherit (add) licenses shared by the Manager Library

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View Manager Library

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Admin
- Library Settings
- Menu Settings
- Google Scholar
- User Accounts
- View Recent Updates
- Resource Inheritance

ADMINISTRATIVE
- Resource Inheritance ←
- Menu Settings
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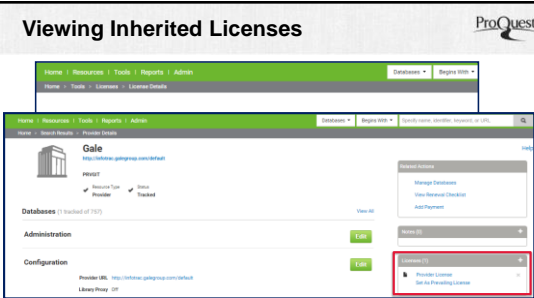
Manager Details

Consortium Name ▲	Auto Accept	Date Added
*Test Consortia Library 7 Library Name DO NOT TOUCH X	On	2010/09/28

- Members libraries can view the Consortium Manager Libraries you belong to by clicking on **Resource Inheritance** in the Admin Menu or the Administrative section on the Intota Home Page.

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Viewing Inherited Resources

- Use the appropriate tab to view the inherited Databases and/or Licenses.
- You will see these in the list of resources in Intota, with the status of "From Consortium" (Databases only) along with the name of the Manager Library who shared the resource.

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Viewing Inherited Resources

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Viewing Inherited Licenses

- View inherited Licenses from the Origin Manager Library in your Licenses List in Intota.

Viewing Inherited Licenses

- View inherited Licenses from the Manager library in your Licenses List in Intota.
- Licenses inherited remain attached to the resources as shared by the Manager Library.
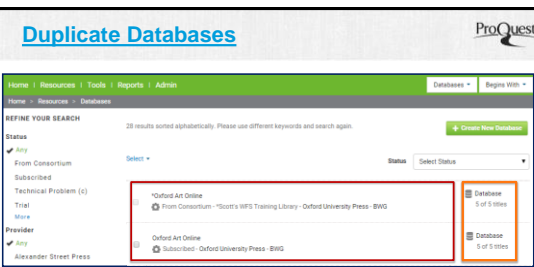
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Duplicate Databases

Duplicate Databases

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Sharing and Inheritance Report

- The Sharing and Inheritance (Management) Report can be created only by the Manager library.
- The report provides a high-level view of the shared Databases and Licenses and if that resource was inherited was the Member library.

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Sharing and Inheritance Report

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Object Type:	Object Name:	Origin =		Date Shared
Database or License	Name of Resource	Manager Library		(Manager) **&** **Date Inherited** (Member)

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ISR Support Documentation

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- Introduction to Interlibrary Shared Resources (#13120)
- Viewing Member Libraries (#13145)
- Sharing Databases and Licenses with a Member Library (#13146)
- Viewing Manager Libraries (#13151)
- Adding Shared Databases and Licenses from Manager (#13152)
- Working with Inherited Resources (#13163)
- Duplicate Resources (#13170)
- Sharing and Inheritance Report (#13171)
- Presentation Slides (#12585)

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THANK YOU!

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