Rialto and Gobi eBooks

Thursday, April 25, 2024   10:02 AM
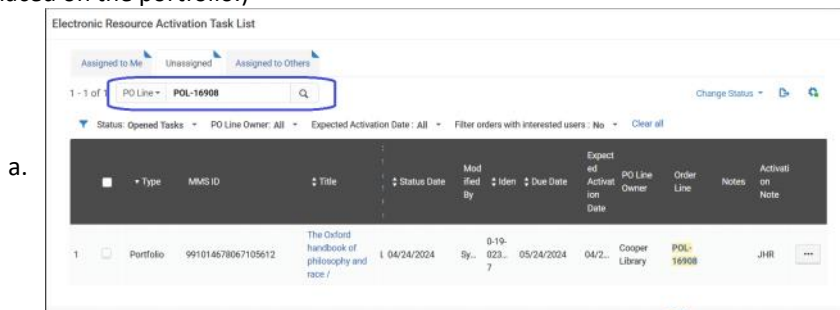
(Documentation from: Jessica S. Scott)

Difference Between Rialto and Gobi.

Most of the individual eBooks will be Rialto since that is the system we will eventual switch over to, but below are a few notes to tell the difference between the two.
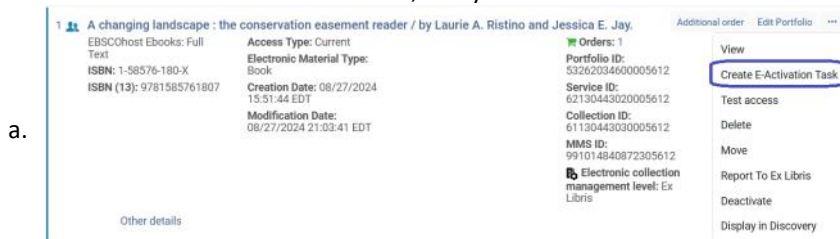
Rialto	Gobi

• Email from Proquest
  • Email address: pq-csacademic@clarivate.com
  • Subject "ACCESS NOTIFICATION: Clemson University (01)"
• Excel .cvs sheet with the titles attached to the email
	• Email from a member of the Acquisitions Team
	• The email might have the invoice attached.

Rialto and Gobi Process

1. Save email & spreadsheet (Suggest saving to computer as PDFs and not in the mailbox)
2. In Alma, go to Resources on the left side of the screen, and under Manage Inventory, select Manage **Electronic Inventory Activation**.
3. Under the **Unassigned Tab**, search for the portfolio. (Using the PO Line will give you the exact search results if it is correctly placed on the portfolio.)
   a.
4. If no search results appear, do a regular portfolio search in Alma.
5. Once you find the portfolio under the ellipses, click on Create E-Activation Task. This will send the portfolio back to the Electronic Resource Activation Task List, and you research the title.
   a.
6. On the portfolio Click on the ellipses and hit Edit Resource

a.

7. Click **Edit Portfolio** in the portfolio's right corner, and if needed, add information under the following tabs
   a. **General Tab:** Make sure the **Provider** from the email and the **Collection Name** on the portfolio match. If **Portfolio availability** has not automatically switched to "Available", you can activate it. Add the **Electronic material type** if it is blank. It is usually a "Book" unless it appears otherwise. By **Library** you can put "Cooper Library".

   b.

   c. **Link Tab:** Check if the **Proxy enabled** has been set. If not, unless you have been told otherwise, click yes by **Proxy enabled** and by **Proxy selected** choose "Default (currently: Proxy)".

   d. **Notes Tab:** On the email, at **License:** see the user limit, then go to the Notes tab and copy and paste the access limit in the Public Note text box.

8. Hit save at the top right. Now that you have edited the portfolio, Alma will automatically put it under the **Assigned to Me Tab**.
9. Go back to the portfolio, and under the ellipses on the left, click **Test Access**.
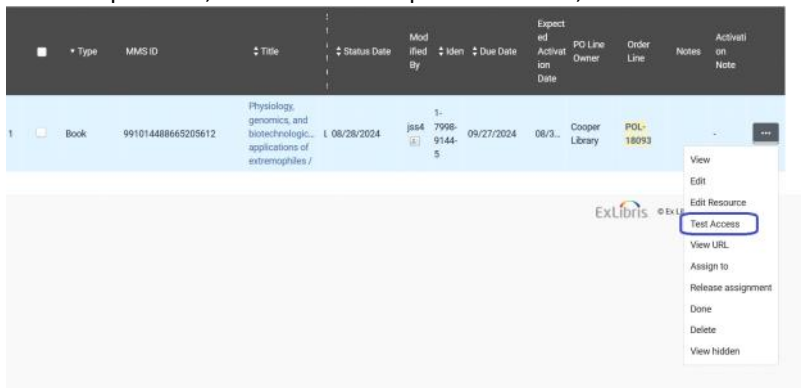
   a.

10. Hit the collection link and let it open up to the eBook's website, go back to the spreadsheet or email and hit that link and make sure they go to the same book.
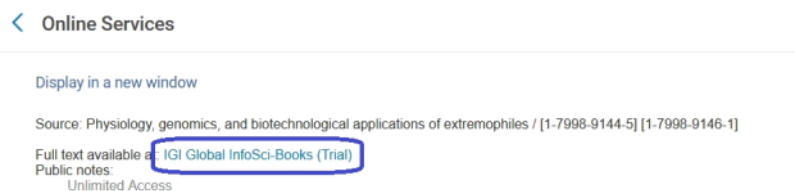
    a.

11. Next you need to test how it looks in Primo. You can do this by searching on the library's website or re-find the title in Alma and, under the ellipses, click on Display in Discovery.

    a. Library site

       i.
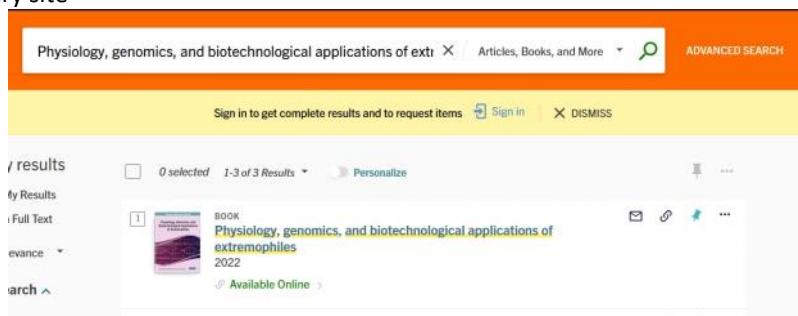
    b. From Alma

       i.

12. Make sure everything looks and works correctly on the book.

a.

13. If everything looks fine, go back to the Electronic Resource Activation Task List, go to the ellipses again, and this time hi t Done. This will automatically send a notification to the requestor. Remember to record that you made an update or activation to a record.
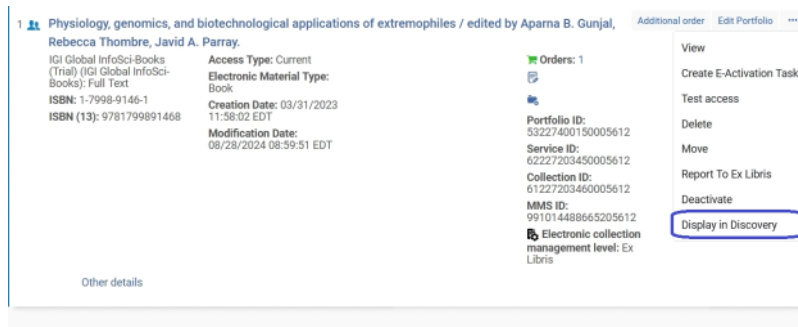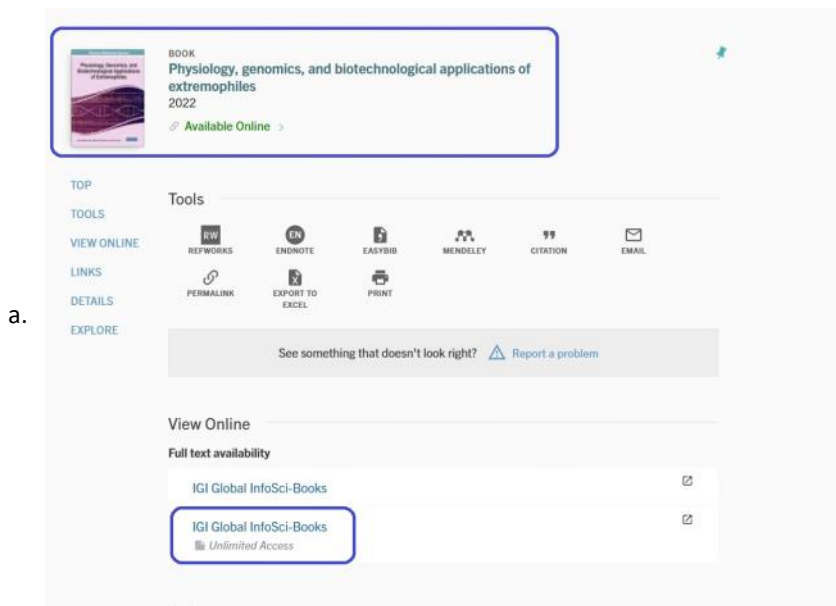
Batch Process

While you will still have to individually send the portfolios to the Electronic Resource Activation Task List and do URL editing one at a time, you can batch-process portfolios if all of the eBooks have the same Licensing for users. For example, in the image below, all titles have a License of "Unlimited Access" like the list below.

Provider: Taylor & Francis
License: (UA) Unlimited Access
Order Line ID: POL-19097
Identifier 9781315750132
Title: Bullying Among University Students : Cross-national perspectives
Access URL: https://www.taylorfrancis.com/books/9781315750132

Provider: Taylor & Francis
License: (UA) Unlimited Access
Order Line ID: POL-19095
Identifier 9781315297293
Title: College Students' Sense of Belonging: A Key to Educational Success for All Students
Access URL: https://www.taylorfrancis.com/books/9781315297293

Provider: Taylor & Francis
License: (UA) Unlimited Access
Order Line ID: POL-19093
Identifier 9780429292026
Title: Handbook of Latinos and Education : Theory, Research, and Practice
Access URL: https://www.taylorfrancis.com/books/9780429292026

Provider: Taylor & Francis
License: (UA) Unlimited Access
Order Line ID: POL-19096
Identifier 9780429486678
Title: Teaching language variation in the classroom : strategies and models from teachers and linguists / edited by Michelle D. Devereaux and Chris C. Palmer
Access URL: https://www.taylorfrancis.com/books/9780429486678

Provider: Taylor & Francis
License: (UA) Unlimited Access
Order Line ID: POL-19094
Identifier 9781003095644
Title: Visioning Multicultural Education
Access URL: https://www.taylorfrancis.com/books/9781003095644

1. First you must create and save a portfolio set in Alma of the titles.
    a. I suggest doing an advanced search of the **Order Lines ID** using an **Electronic Portfolio: Portfolio PO Line ID** to insure you get the exact portfolios. Make sure to switch the Boolean from AND to OR.
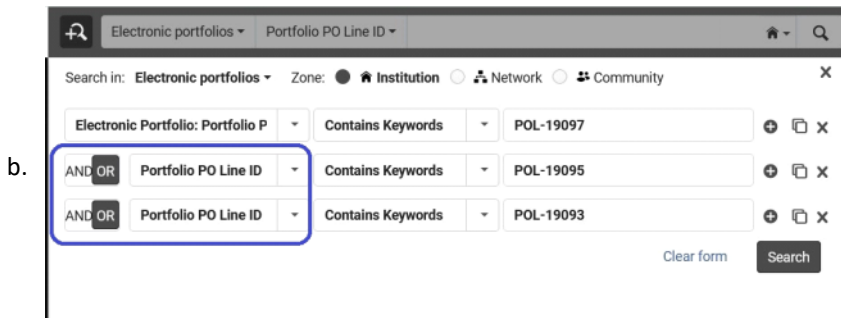
b.

2. Next, go to the left-hand side of Alma and choose **Admin** and go to **Run a Job**.
3. Search for the job "Change Electronic portfolio information" and hit next. You will be taken to a list of your saved Sets and you can find the one you created and choose it.
4. It will lead you to a from with all the option you'd choose if you were updating a single portfolio. Check the fields you will need to make sure you update and fill in the information.

Library	Cooper Library
Electronic Material Type	Book
Enable proxy	Yes
Set Proxy	Default (currently: Proxy)
Set availability status	Active
Override public note	(Put licensing information)

a.

Possible Problems

No link or no access

If the Parser and Parser parameter links from the Community Zone don't work or are missing, you can use the link from the Rialto or Gobi emails.

1. open the portfolio, and under the **Linking Tab** at **URL type** or (**URL type (override)** if the first one isn't available),
2. select **Static URL**, then copy the link to the book from the email into the **Parser parameters (override)**.
   - If the link from the email still does not work, report it to the Aqucistions Team.

If notification was not sent

According to the answer on Alma's "When is a notification sent to interested users" interested patrons for the eResource user who requested it should automatically be notified by email when the portfolios is **activated** and **Done** is hit in the **Electronic Resource Activation Task List**. If you find out a notification was not sent, or the automation is not working you can do this manually.

1. Go to the order by clicking the **Order** on the **Electronic Portfolio**, **Electronic Title** or searching under **Order lines** in the Alma Search box.
   a. Portfolio PO Line

   i.
   b. Electronic Title

   i.
   c. Alma Search

i.

2. Click on the **Order Line** to see the PO Line information and hit **Interested Users** on the left-hand side to see the requestors.
3. Click on the person's name, and you will find the person's name and email information to alert them that the eBook they requested is now available.
   a.

Complex problems

1. If something goes wrong, email the eResourse Cataloging Librarian a message about the problem along with the Title, MMS ID and Portfolio ID.
2. If the portfolio is still in the **Electronic Resource Activation Task List** under the ellipses, hit Assign To find the eResource Cataloging Librarian's name and send it to them. Send them an email to let them know of the problem.
   a.