



## STANDARD OPERATING PROCEDURE

<b>SOP CODE</b> <b>XLI-005-02</b>	<b>SOP TITLE</b> <b>SUBSCRIPTION OF ELECTRONIC JOURNALS</b>
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**PART 1**

<b>Author</b>  <hr/> <b>MS MONA LISA COPPINI</b>  <b>SENIOR ASSISTANT LIBRARIAN</b>	
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**PART 2**

<b>Approver</b>  <hr/> <b>MR KEVIN J. ELLUL</b>  <b>DIRECTOR LIBRARY SERVICES</b>	
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**PART 3**

<b>Authoriser</b>  <hr/> <b>MR SIMON SAMMUT</b>  <b>UNIVERSITY SECRETARY</b>	<b>Date of issue:</b>  <b>Date of next revision:</b>
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**PART 4 (To be filled in by OOTS, QSU or RSSD)**

<input type="checkbox"/> This procedure has been revised and is no longer valid as from:  (Write date)	<input type="checkbox"/> Date of NEXT REVISION is extended until:  (Max. 4 years)	<input type="checkbox"/> SOP rendered obsolete on:  (Write date)
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## 1. Reason for revision

1.1. Update of SOP as per new UM template

## 2. Purpose and scope

2.1 This procedure aims to describe the workflow to acquire and process an electronic journal subscription.

## 3. Definitions

3.1. AIMS: Administrative Information Management Systems. This system was established in order to have an integrated management information system which adequately serves the University of Malta's dynamic demand.

3.2. ALMA: The Library Management System (LMS) implemented by the UM Library in July 2017.

3.3. EZ Proxy: Proprietary proxy server software, designed to enable libraries to provide easy access from outside their local computer networks to Web sites that restrict access by IP address.

3.4. HyDi: Library Discovery & Delivery Portal

3.5. LMS: Library Management System. This system is an integrated set of applications designed to perform the business and technical functions of a library, including acquisitions, cataloguing, circulation, and the provision of public access.

3.6. Requisition: A written request for the ordering of materials, equipment, supplies, or services.

3.7. UM: University of Malta

3.8. URL: The unique address identifying a resource accessible at a particular location on the Internet for routing purposes.

## 4. Responsibilities

### 4.1 Roles and Responsibilities of the Director of Library Services:

4.1.1 The Director of Library Services is responsible for approving requests for subscribing to new journal titles.

4.1.1 The Director of Library Services is responsible for approving requisitions and invoices.

### 4.2 Roles and Responsibilities of the Director's Assistant:

4.2.1 The Director's Assistant is responsible for raising requisitions before confirming purchase of the journal.

4.2.1 The Director's Assistant passes the relevant invoices to the Finance Office.

#### **4.3 Roles and Responsibilities of the Head of the Periodicals Department:**

4.3.1 The Head of the Periodicals Department is responsible for checking the price and other information of the journal being subscribed.

4.3.2 The Head of the Periodicals Department informs the requester when the journal is ordered and is available on the *HyDi*.

4.3.3 The Head of the Periodicals Department records the invoices on the LMS before passing them to the Director's Assistant.

4.3.4 The Head of the Periodicals Department activates the journal and makes it available on *HyDi*.

#### **4.4 Roles and Responsibilities of the IT Officer:**

4.4.1 The IT Officer is responsible to add the required URL to the EZ Proxy Server.

### **5 Health and Safety requirements**

5.1 N/A

### **6 Procedure**

6.1 Recommendations for subscribing to new journal titles are normally placed by academic members of staff. Requests are usually sent by email to the Head of the Periodicals Department or to the Director of Library Services. Students recommending new journal titles are asked to channel their requests through their respective supervisors/academics within their Faculty. No requests are processed unless the recommendations are forwarded to the Library and endorsed by an academic member of staff.

6.2 As an administrator, the Head of the Periodicals Department checks the price of the journal on EBSCONET. If for any reason the price is not available on EBSCONET, the Head of the Periodicals Department requests a quotation from the publisher/agent by email. As an administrator, the Head of the Periodicals Department has access to various databases' accounts, can manage databases and retrieve usage reports.

6.3 When the quotation is received, it is passed on to the Director of Library Services for approval.

- 6.4 If approved, a confirmation email is sent, by the Head of the Periodicals Department, to the publisher/agent and an invoice is requested.
- 6.5 If approved, a requisition is raised by the Director's Assistant through AIMS, which is then approved by the Director of Library Services.
- 6.6 The Head of the Periodicals Department informs the academic placing the request that the journal has been ordered. Meanwhile, a confirmation email is sent by the Head of the Periodicals Department to the publisher/agent and an invoice is requested.
- 6.7 Once the invoice is received, a copy is kept at the Periodicals Department. Invoices are recorded, scanned and attached on the LMS (Appendix 8.1). The invoice is then passed on to the Director's Assistant. Invoices are recorded, endorsed by the Director of Library Services and forwarded to Finance Office to effect payment.
- 6.8 Once the invoice is paid, access to the journal is activated by the Head of the Periodicals Department. This will make the journal available on *HyDi*. The activation of a journal includes adding the general information, linking information and coverage information (Appendix 8.2).
- 6.9 Access is then tested by the Head of the Periodicals Department.
- 6.10 If the journal's platform URL was not previously added to the EZ Proxy server, an email is sent by the Head of the Periodicals Department to the IT Support Services ([support.itservices@um.edu.mt](mailto:support.itservices@um.edu.mt)) in order to complete this process.
- 6.11 The Head of the Periodicals Department would then inform the requester that the journal is available on *HyDi*, and gives instructions on how to access it. Step-by-step instructions are given out to the journal requester on how to find the specific journal title being subscribed to.
- 6.12 Once a year, usually between October and December, renewals, cancellations and new orders are confirmed for the following year. This is done through emails between the Head of the Periodicals Department and the respective publishers/agents.

## 7 References

- 7.1 EBSCONET login page, 2017, [Online], Available at [www.ebsconet.com](http://www.ebsconet.com) [Accessed 05<sup>th</sup> May 2020].

7.2 HyDi search engine page, 2017, [Online], Available at <https://hydi.um.edu.mt> [Accessed 5<sup>th</sup> May 2020].

7.3 Online Dictionary for Library and Information Science, 2017, [Online], Available at [http://www.abc-clio.com/ODLIS/odlis\\_A.aspx](http://www.abc-clio.com/ODLIS/odlis_A.aspx) [Accessed 5<sup>th</sup> May 2020].

## **8 List of appendices/worksheets**

8.1 Appendix 1: Screenshot of an invoice recorded on LMS.

8.2 Appendix 2: Screenshot of electronic journal activation.

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Appendix 1: Screenshot of an invoice recorded on LMS.

The screenshot displays the Alma LMS interface for an invoice. At the top, the Alma logo and navigation tabs (Tasks, Analytics) are visible. The current page is 'Invoice Line Details' for invoice number P028035, line number 1, with vendor EBSCO. The 'Invoice Line Details' section shows the following information:

- Type: Regular
- PO line: POL-208
- Title: Geotechnique
- PO line price: 909.46 EUR
- Check subscription date overlap: No
- Additional information: -
- PO line subscription from date: -
- Subscription from date: 01/01/2017
- Line number: 1
- More Information
- PO line subscription to date: -
- Subscription to date: 31/12/2017

The 'Invoice Lines of Current PO Line' section shows 'No records were found.' The 'Invoice Line Charges' section displays:

- Price: 909.46 EUR
- Total price: 909.46 EUR
- Quantity: 1
- Reporting code: -
- Secondary reporting code: -
- Note: -
- Invoice amount: 909.46 EUR
- Release remaining encumbrance: No
- VAT note: -
- Tertiary reporting code: -
- Total invoice lines amount: -

The 'Funding' section contains a table with the following data:

#	Fund Name	Percent	Amount
1 1	PERIODICALS (FY-2017) (98.929.81 EUR)	100.0%	909.46 EUR
2 Total	-	100.0%	909.46 EUR

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Appendix 2: Screenshot of electronic journal activation.

Electronic Portfolio Editor Relink to another bibliographic record Cancel

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Resource description [Geotechnique Institution of Civil Engineers ENGLAND](#)  
 Collection name [ICE Virtual Library Journals](#)      Collection ID 6127921430003956      [View all the collection's portfolios](#)  
 Service Type Full Text      Service ID 6227922560003956      [View all the collection's services](#)  
 Portfolio ID 5330472930003956

General Information    Linking Information    Coverage Information    Acquisition Information    Notes    Group Settings    History

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Portfolio availability Available      Electronic material type Journal  
 Activation date 10/08/2017      Expected activation date 10/08/2017  
 Library Main Library

Relink to another bibliographic record Cancel

Electronic Portfolio Editor Relink to another bibliographic record Cancel

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Parser (Service Level) ASCE-ASCE  
 Service Parser Parameters url=http://www.icevirtuallibrary.com  
 Parser Parameters -  
 URL type Static URL  
 Static URL http://www.icevirtuallibrary.com.ejournals.um.edu.mt/toc/jgeot/current  
 Proxy enabled Yes      Proxy selected

Relink to another bibliographic record Cancel

Electronic Portfolio Editor Relink to another bibliographic record Cancel

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Which coverage statement will be applied? Only local

**Global Date Information**

No relevant information.

**Local Date Information** Columns ▾ Tools

From Year	From Month	From Day	From Volume	From Issue	Until Year	Until Month	Until Day	Until Volume	Until Issue
1	2003	-	-	-	-	-	-	-	-