

Managing Electronic Resources



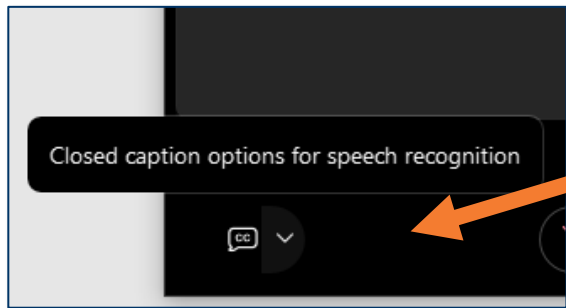
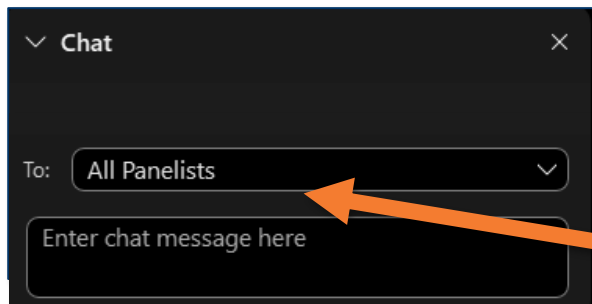
ERM-101 Overview and Background

Alma

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Customer Education Team

ExLibris
Part of **Clarivate**

A few points about WebEx



- Technical issues? Exit and rejoin the WebEx session
- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu
- Turn captions on and off in the lower-left corner of the WebEx screen

Intended Audience for this Series

Everyone who manages (or will manage) e-resources in Alma is welcome to join all sessions!



- Brand-new to Alma? Try these first:
 - **Getting to Know Alma**
 - **Alma Essentials**
- Experienced with e-resources in Alma? Join us for the advanced sessions.

Managing Electronic Resources Series



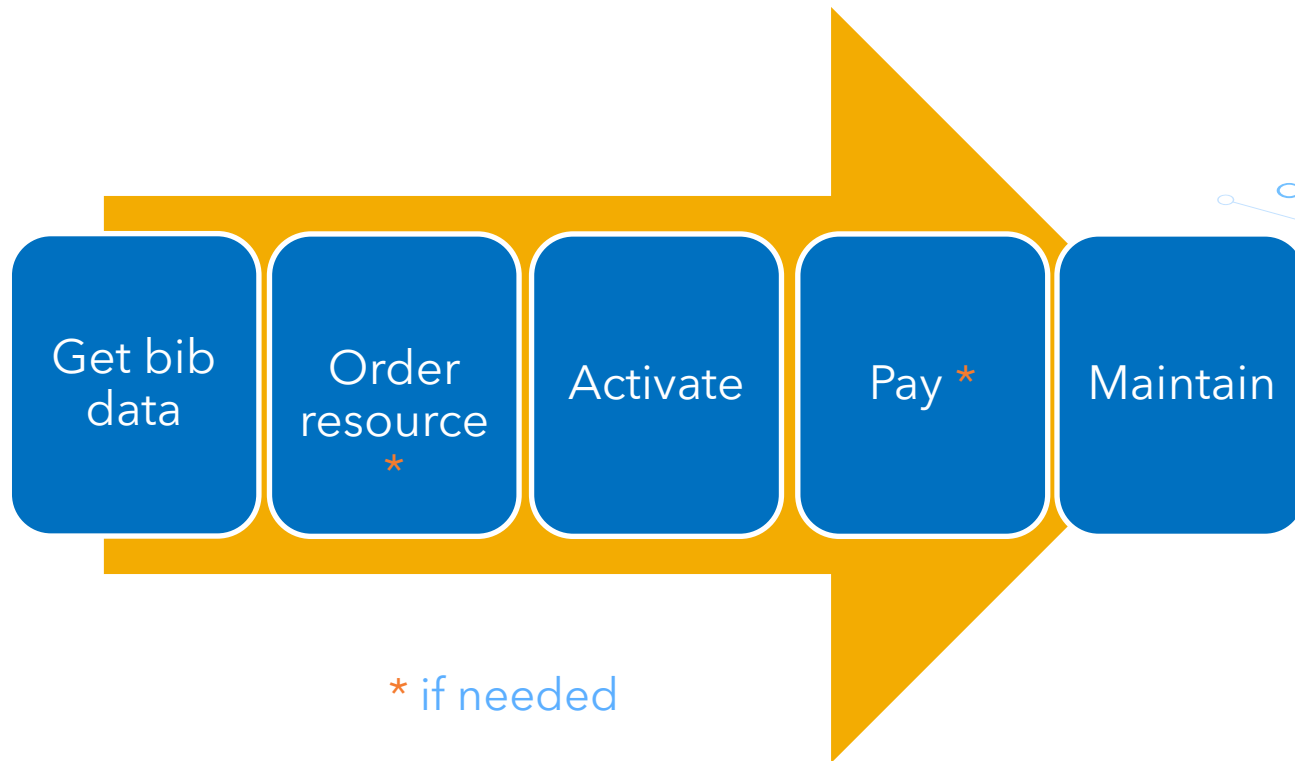
ERM	Session	Date
101	Overview and Background	Sep 21
102	Order and Activate Collections	Sep 28
103	Order and Activate Portfolios	Oct 5
201	Maintain E-Resources	Oct 12
202	Troubleshoot Discovery	Oct 19
203	Overlap Analysis	Oct 26
301	Usage Statistics, COUNTER, and SUSHI Harvesting	Nov 2
302	Analytics of E-Resources	Nov 9
B-1	Contribute to the Community Zone	Nov 16
B-2	Upload Electronic Holdings for E-Book Central ...	Nov 30

Agenda



- **General E-Resource Workflow**
- Terminology
- Inventory Model in Alma
- Types of Electronic Portfolios
- User Roles
- Further Resources

E-Resources Workflow



Agenda



- General E-Resource Workflow
- **Terminology**
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Collections, Portfolios, and Titles ... oh my!

- **Title:** Individual resource (book, journal, etc.), usually available from several vendors
- **Portfolio:** Single title from a specific vendor and (if available in a package) contained within a specific collection
- **Collection:** Group of portfolios that are titles made available together by a vendor (a.k.a.: “package,” “database”)



Collections, Portfolios, and Titles ... oh my! (cont.)

- Same title could be in several different portfolios. For example:
 - Provided by different vendors
 - Provided by one vendor in different packages (therefore, found in different Alma collections)
 - Available with different coverage dates
- Each portfolio has its own ID, to distinguish it from other portfolios of the same title: **PID**



Databases vs databases

- Vendors sometimes call their packages of titles “databases.”

HOWEVER!

- In Alma, a Database is a Collection with **no portfolios**
 - Usually a “package” of abstracting and indexing “citation-only” content



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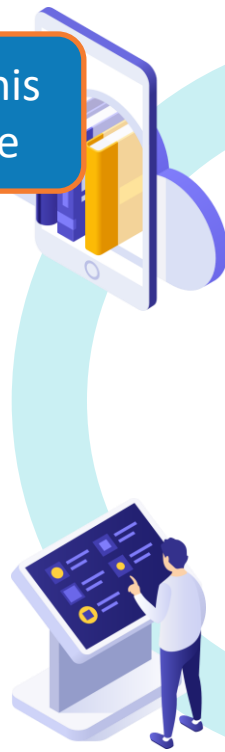
Bib Records: Physical vs Electronic vs Digital

P = Bibliographic record with holdings and items attached to holdings

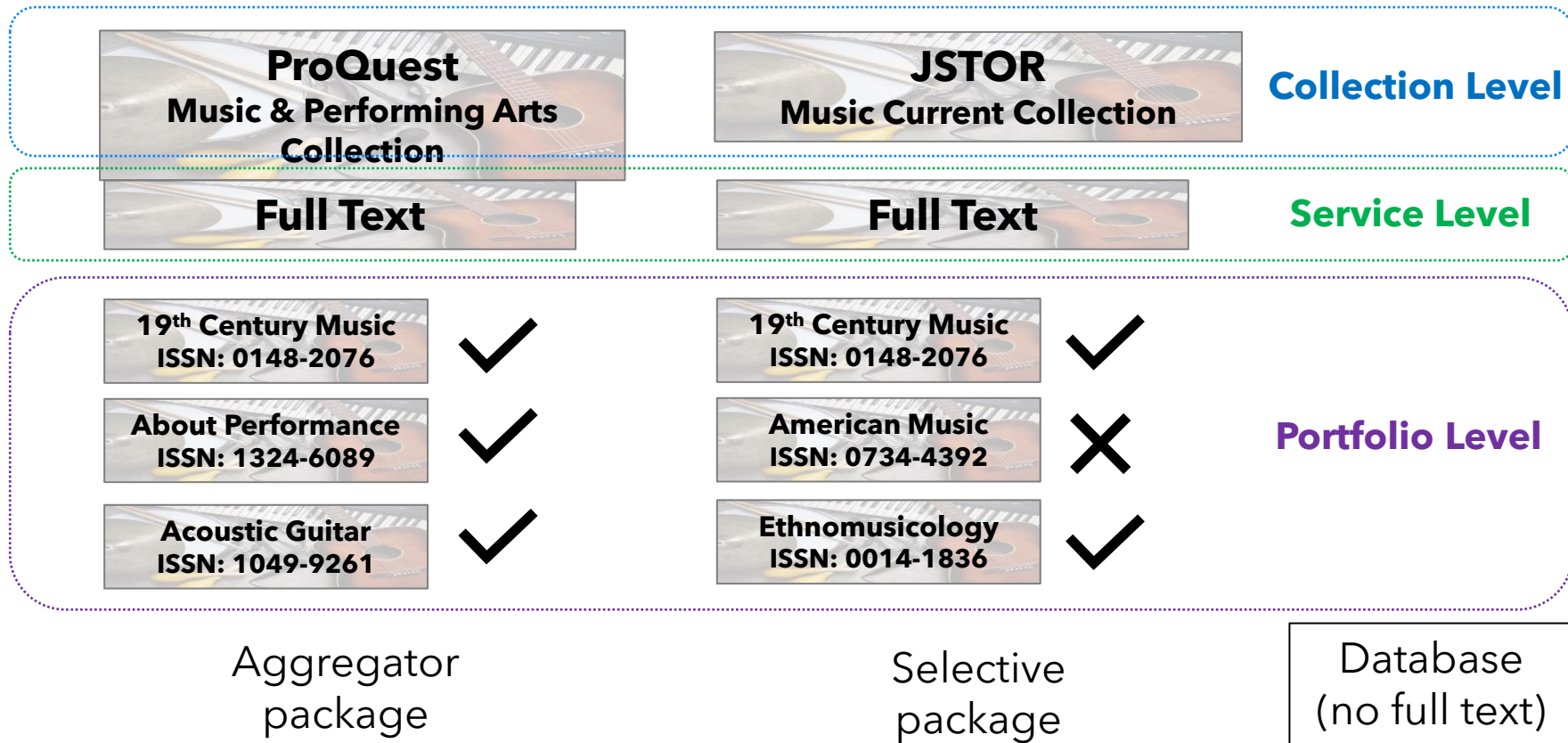
E = Bibliographic record with portfolios. May be part of an electronic collection or “standalone”

D = Bibliographic record with digital representation, and digital objects attached to representation

Subject of this
ERM Course



Collections, Portfolios, and Services



Electronic Resources Data Structure

Canadian social trends

Alma Search

The screenshot displays the Alma Search interface. At the top, there is a search bar with a magnifying glass icon on the left and a home icon on the right. Below the search bar, there are two dropdown menus: "Electronic collection" and "Electronic Collection Name". A search icon is also present on the right side of the search bar.

On the left side, there is a list of search filters. The first filter is "All titles", which is highlighted with an orange box. Below it are "Physical titles", "Physical holdings", and "Physical items". The second filter is "Electronic titles", which is also highlighted with an orange box. Below it are "Electronic portfolios", "Electronic collection", and "Digital titles".

On the right side, there is a "Search Zone:" dropdown menu. It has four options: "Institution" (with a house icon), "Network" (with a group of people icon), "Community" (with a group of people icon), and "All titles" (with a magnifying glass icon).

In the center of the interface, there is a list of search results:

- Electronic Collection
- Electronic Portfolio
- Electronic Title
- All Titles

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Electronic Portfolios - Types

- Journals (e-journals)
- Books (e-books)

Not databases (no portfolios)



Electronic Portfolios - Collection vs. Standalone

- Titles are usually sold as part of a package

(therefore)

- Portfolios are usually found in collections in Alma
- BUT! Portfolios can be standalone, not in a collection



Electronic Portfolios - Continuous vs. One-Time

- Continuous Purchase = Subscription
 - Renewal Dates
 - Automated or manual renewals
 - License limitations
- One-Time Purchase = Ownership
 - No renewal
 - License limitations



Demonstration in Alma

The screenshot displays the ExLibris Alma web application interface. The top navigation bar includes the ExLibris logo, a search bar with 'Electronic collection' and 'Title' filters, and various utility icons like home, search, shopping cart, location, user profile, notifications, help, and a refresh button. The left sidebar contains a menu with icons and labels for Alma, Market, Acquisitions, Resources, Discovery, and Configuration. The main content area features a 'Welcome,' message with the date '07/27/2022' and a 'Tasks' panel. The 'Tasks' panel lists several items with counts and expandable arrows:

Tasks	
4	Purchase Requests >
15	Borrowing Requests >
1	Lending Requests >
18	Other Requests >
158	Order Lines >
23	Invoices >
106	Electronic Resources >
1	Trials >
14	Reading Lists >

A 'GuideMe' button is located in the bottom right corner of the main content area.



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User Roles

- Purchasing Operator
- Purchasing Manager
- CDI Inventory Operator
- Electronic Inventory Operator
- Electronic Inventory Operator - Extended
- Electronic Inventory Operator - Limited
- Repository Manager
- Invoice Operator
- Invoice Manager

Specific roles
for e-resources

User Roles			
1 - 7 of 7			
<input type="checkbox"/>	Active	Role Name	Role Area
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CDI Inventory Operator	Inventory
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Electronic Inventory Operator	Inventory
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Electronic Inventory Operator - Extended	Inventory
4	<input checked="" type="checkbox"/>	License Manager	Acquisitions
5	<input checked="" type="checkbox"/>	Purchasing Manager	Acquisitions
6	<input checked="" type="checkbox"/>	Purchasing Operator	Acquisitions
7	<input checked="" type="checkbox"/>	Repository Manager	Inventory

Can link
portfolio to
another bib

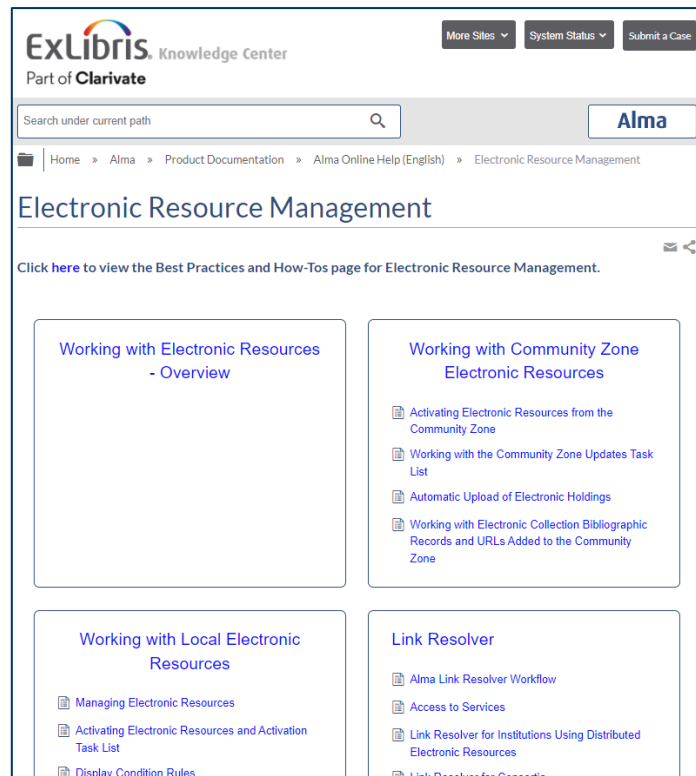
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Documentation and Further Training

- [Managing Electronic Resources](#)
- Alma LibGuide
 - [Resources tab](#)
- Video Training
 - [Getting to Know Alma](#)
 - [Alma Essentials](#)



About Today's Session, and Register for Next Week

[Ex Libris Knowledge Center](#) > [Alma](#) > [Training](#) > [Webinars](#) > [E-Resource Management](#)



- Download these presentation slides
- Watch the recording of this session
- Register for upcoming sessions
(and see what content they will contain)
- Download exercises
(but not for today's session)

An illustration of a person with dark hair wearing a yellow shirt, sitting at a brown desk and working on a computer. To the right of the person is a tall, light-brown bookshelf filled with colorful books. Above the person and bookshelf are several circular icons: a printer, a document with a checkmark, a document with a magnifying glass, and a document with a list. The background features large, light blue and green circular shapes.

Managing Electronic Resources

Next Week: Order and Activate Collections

- Order one-time and subscription collections
- Activate collections with E-Resource Activation Task List
- Test resources in discovery service

Thank you!

Please fill out the survey that
will appear when you close
the WebEx meeting

