

Managing Electronic Resources



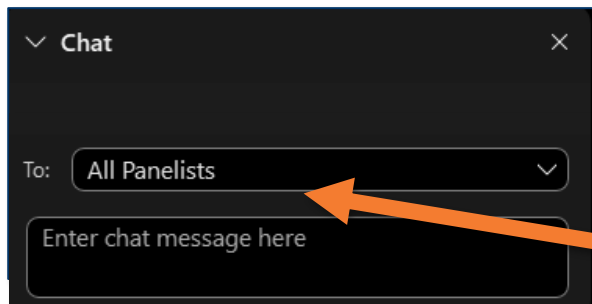
ERM-102 Order and Activate Collections

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Customer Education Team

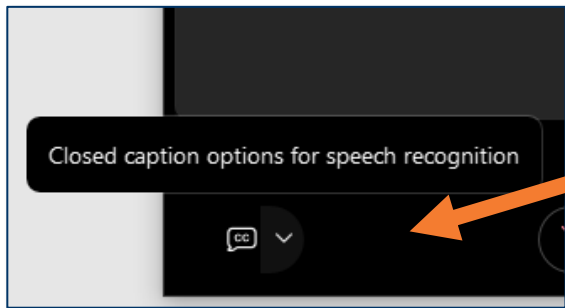
Alma

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



- **Background and General Workflow**
- Order One-Time Collection from CZ
- Order Subscription Collection from CZ
- Activate Collection
- Activate with "My Electronic Resources by Provider"
- Further Resources

Why Order E-Resources in Alma?

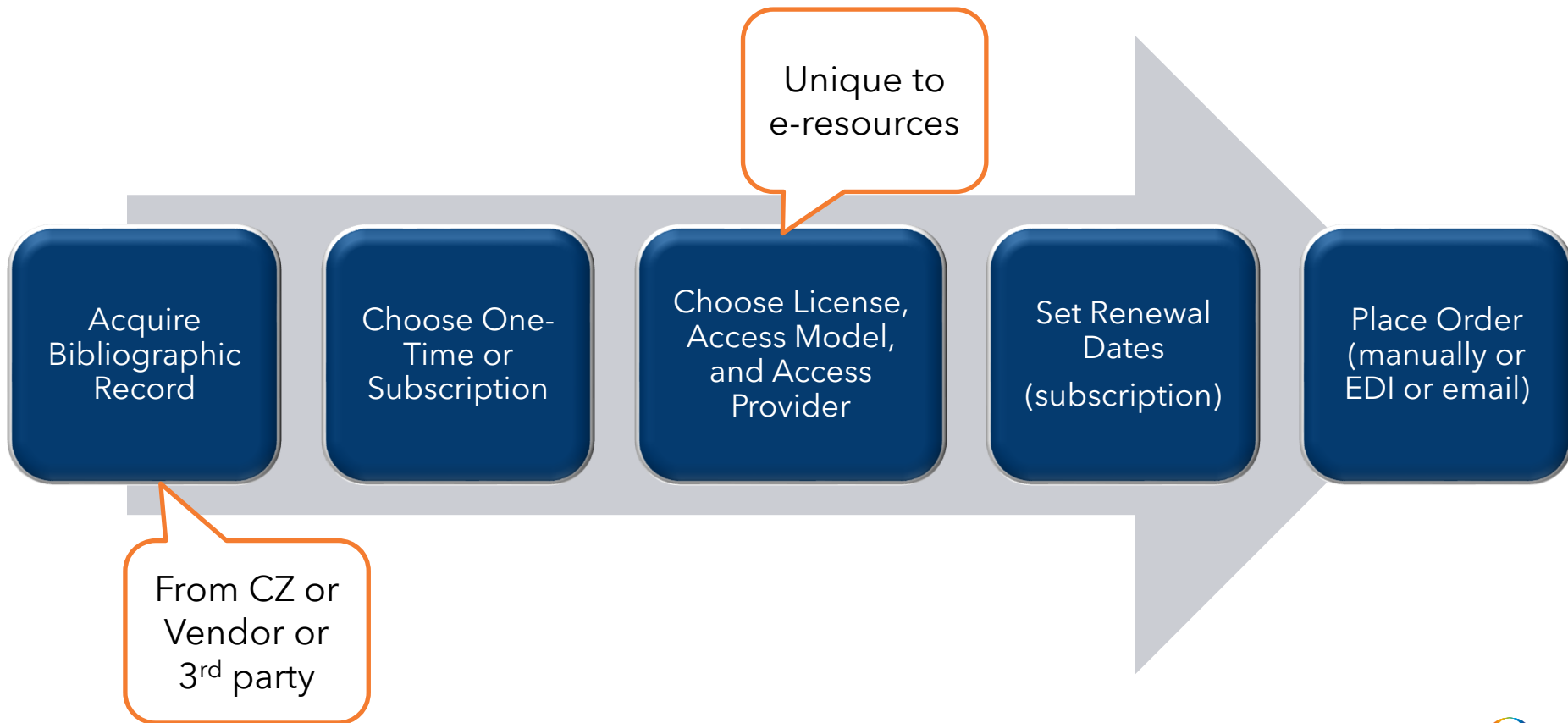
- Track expenses, through ledgers and funds
- Combine with usage data to get cost/use in analytics
- Automate ordering with vendors (EDI, etc.)
- Speed up re-ordering, renewing, etc.

Why Activate E-Resources in Alma?

- Provide access to resources through your Discovery service.

(Well, I guess you could manually add URLs of e-resources on library web pages?)

Order Workflow



Activation Workflow

NOTE: You can activate without ordering!

Activate electronic resource

Test Access

Confirm available to patrons

Renew order (if subscription)

After vendor (or access provider) has authorized access

Before subscription is over

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Prerequisites

- Vendor and fund must already be set up
 - Different vendor for online-resource access (“access provider”)? Also must be set up.
- License already be set up (optional)
 - If you track licenses in Alma
 - Can be added later



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Documentation and Further Training

- [Managing Electronic Resources](#)
- Alma LibGuide
 - [Resources tab \(see ERM section\)](#)
 - [Acquisitions tab](#)
- [My Electronic Resources by Provider](#)
- [Activating Electronic Resources from the Community Zone](#)



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About Today's Session, and Register for Next Week

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



- Download these presentation slides
- Watch recording of this session (and the previous session)
- Download practice exercises
- Register for upcoming sessions
(and see what content they will contain)

Exercises

- Order and activate an electronic collection from the CZ

Download exercise file for details.

Bring any questions and issues to our next session.





Managing Electronic Resources

Next Week: Order and Activate Portfolios

- Order single, subscription portfolio
- Activate portfolio
- Create local collection
- Create local portfolio

Thank you!

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

