

Managing Electronic Resources



ERM-103

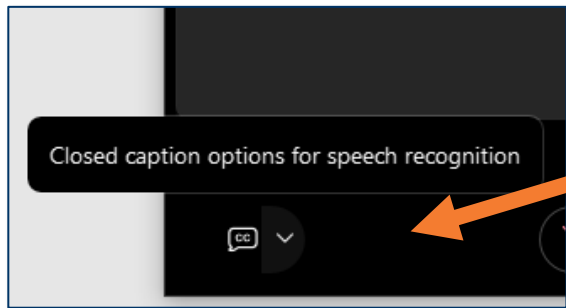
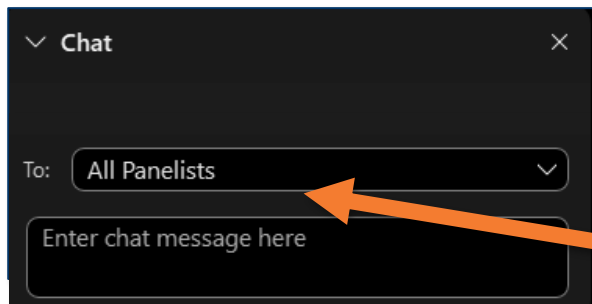
Order and Activate Portfolios

Alma

Kevin Lane-Cummings and Jenny Draeger
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

Managing Electronic Resources Series



ERM	Session	Date
101	Overview and Background	Sep 20
102	Order and Activate Collections	Sep 27
103	Order and Activate Portfolios	Oct 4
201	Maintain E-Resources	Oct 11
202	Troubleshoot Discovery	Oct 18
203	Overlap Analysis	Oct 25
301	Usage Statistics, COUNTER, and SUSHI Harvesting	Nov 1
302	Analytics of E-Resources	Nov 8
B-1	Contribute to the Community Zone	Nov 15
B-2	Upload Electronic Holdings for E-Book Central ...	Nov 29

Agenda



- **Review Exercises**
- General Workflow
- Order Subscription Portfolio from CZ
- Activate Single Portfolio
- View Activated Resource in Discovery
- Create Local Collection
- Create Local Portfolio
- Further Resources

Review Exercises

- Order Subscription Collection from CZ
- Activate Collections



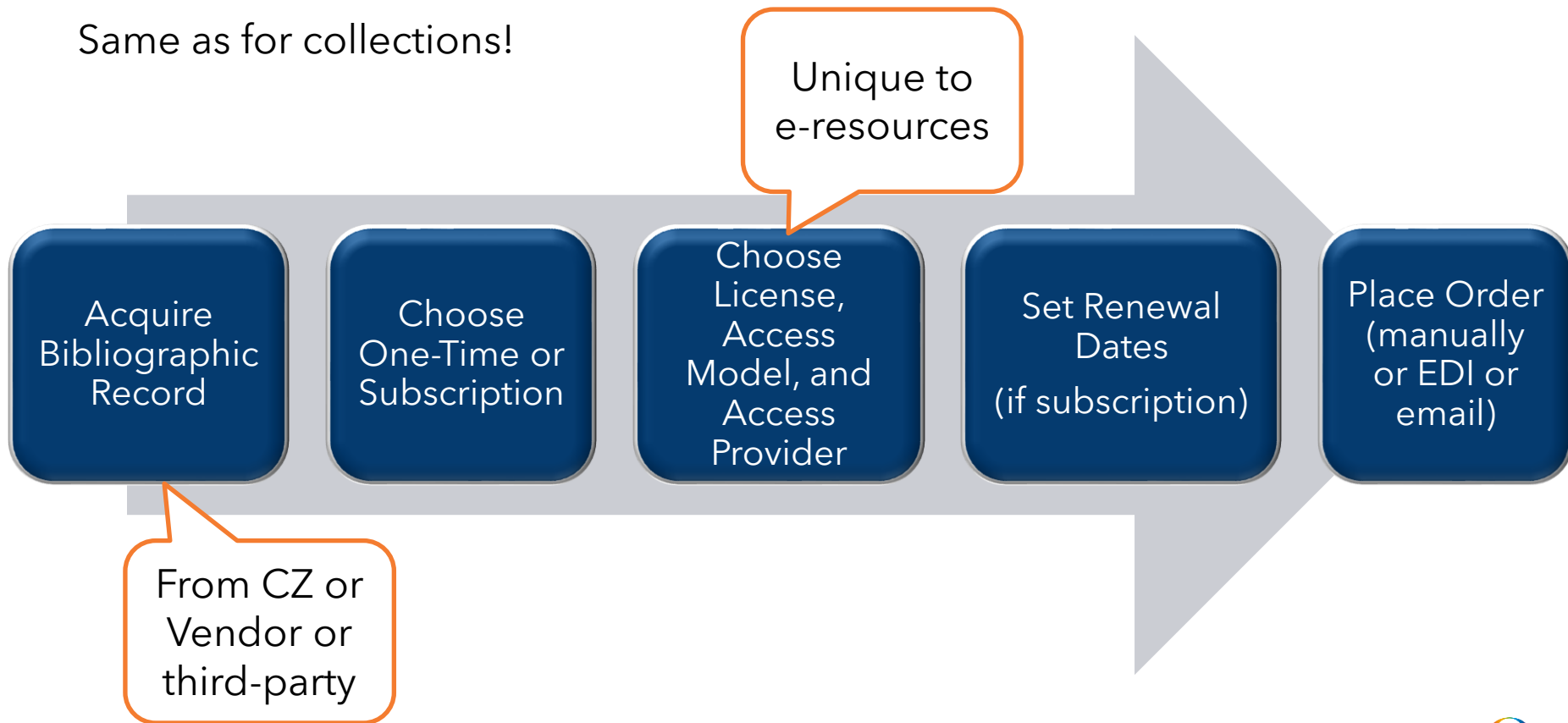
Agenda



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Order Workflow

Same as for collections!



Activation Workflow

Same as for collections!

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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Why Create a Local Collection?

- Vendor collection not in Community Zone
- Organize portfolios into your own “package”
 - Especially if they are local portfolios



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Sources of Bib Records for Local Portfolios

- Cataloger creates it in Metadata Editor
- Outside source (vendor; national library; etc.)
- You create it in Local Collection editor



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Documentation and Further Training

- [Managing Electronic Resources](#)
 - [Adding a Local Electronic Collection](#)
 - [Adding a Standalone Portfolio](#)
- [Alma Resources LibGuide \(see Electronic Resource Management\)](#)
- [Activating Electronic Resources from the Community Zone](#)



Work directly with product experts



Convenient



Interactive



Share and collaborate

[Upcoming Workshops](#) | [Frequently Asked Questions](#) | [Contact Us](#)

About Today's Session, and Register for Next Week

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



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

Exercises

- Order One-Time Portfolio from CZ
- Activate Portfolio
- Create Local Collection
- Create Local Portfolio



Download exercise file for details.

Bring any questions and issues to our next session.



Managing Electronic Resources

Next Week: Ongoing E-Resource Maintenance

- Configure Import Profile
- Use Portfolio Loader
- Update Selective Packages
- And More!

Thank you!

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

