Managing Electronic Resources
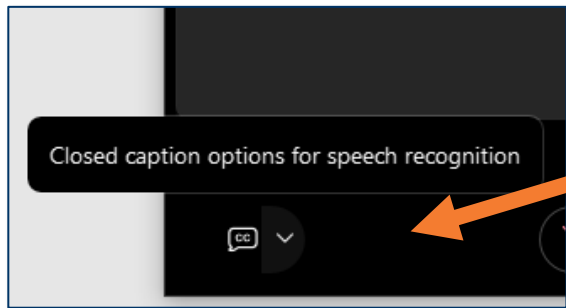
ERM-103
Order and Activate Portfolios

Alma

Kevin Lane-Cummings and Jenny Draeger
Customer Education Team

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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
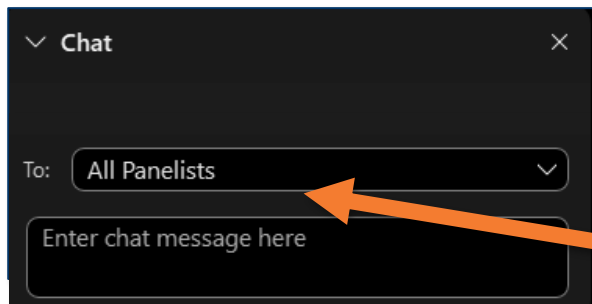
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Managing Electronic Resources Series

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

ERM Exam

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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

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Review Exercises

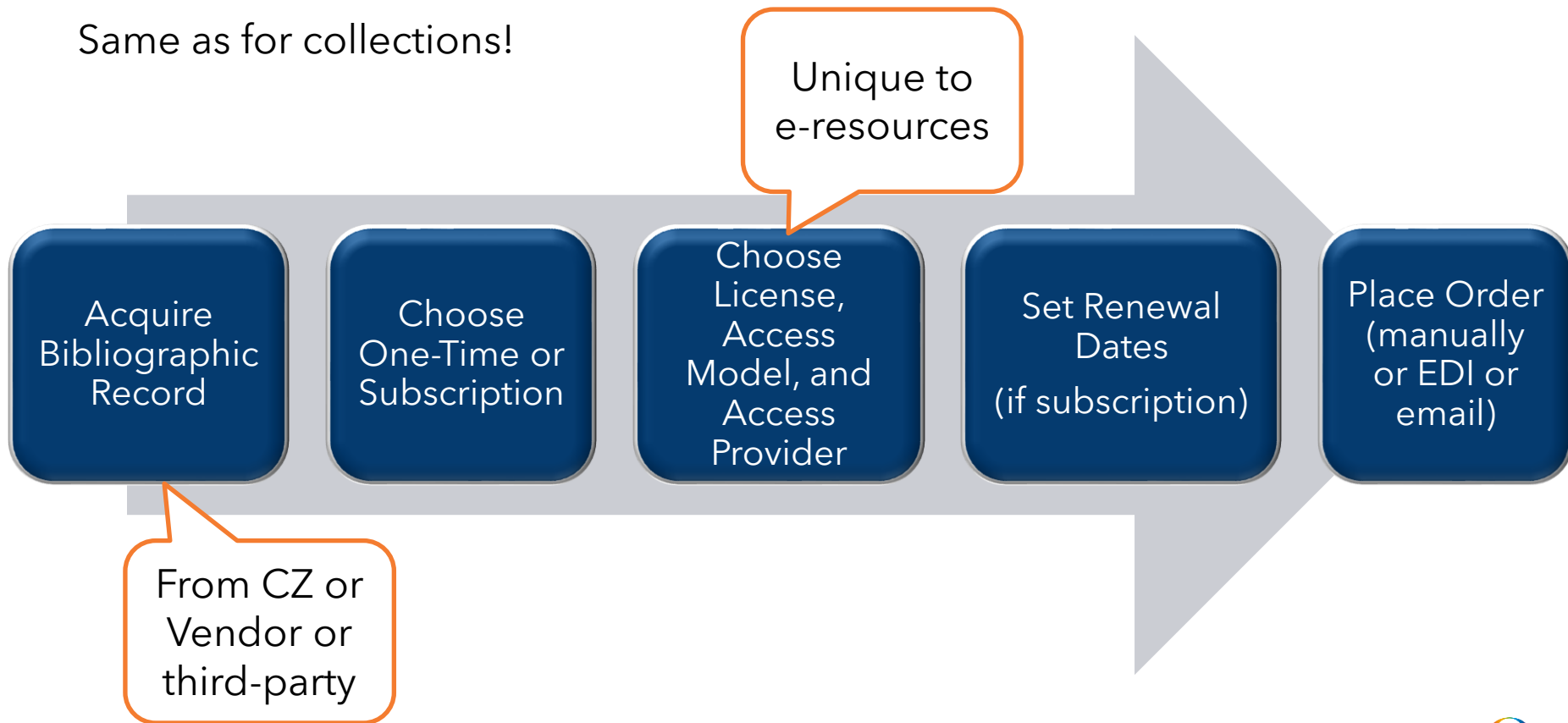- Order Subscription Collection from CZ
- Activate Collections

Agenda

- Review Exercises
- **General Workflows**
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Order Workflow

Same as for collections!

Unique to e-resources

| Acquire Bibliographic Record | Choose One-Time or Subscription | Choose License, Access Model, and Access Provider | Set Renewal Dates (if subscription) | Place Order (manually or EDI or email) |

From CZ or Vendor or third-party

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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

Agenda

- Review Exercises
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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](#)

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Premium Workshops

⚛ **Work directly with product experts**

💻 **Convenient**

🖥 **Interactive**

💬 **Share and collaborate**

<u>**Upcoming Workshops**</u> | <u>**Frequently Asked Questions**</u> | <u>**Contact Us**</u>

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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 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.

SANDBOX
ONLY!
(at first)

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Managing Electronic Resources

Next Week: Ongoing E-Resource Maintenance

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

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Thank you!

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

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