

Managing Electronic Resources



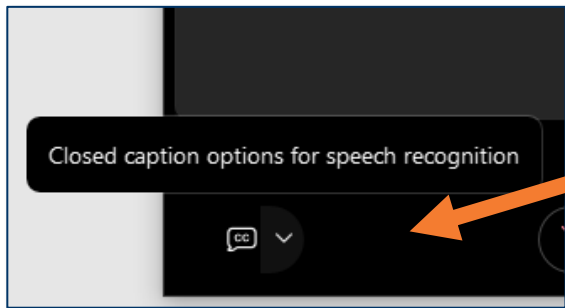
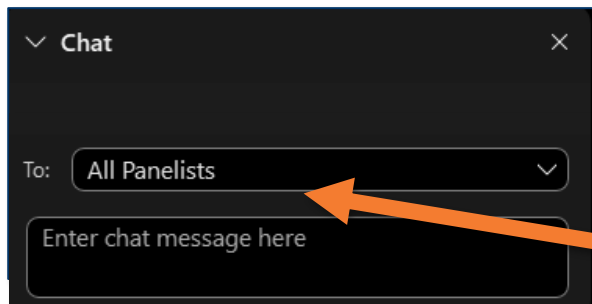
ERM-201 Maintain E-Resources

Alma

Kevin Lane-Cummings and Rachel Bellavia
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**
- Bulk Changes with “Change Electronic Portfolio Information” Job
- Edit Single Portfolio with Portfolio Editor
- Update Selective Packages
- Portfolio Loader
- Import Profile
- Deactivate / Delete Resources
- Further Resources

Review Exercises

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



Agenda



- Review Exercises
- **Bulk Changes with “Change Electronic Portfolio Information” Job**
- Edit Single Portfolio with Portfolio Editor
- Update Selective Packages
- Portfolio Loader
- Import Profile
- Deactivate / Delete Resources
- Further Resources

Changes to All Portfolios in a Set

- Remove local coverage
- Set a proxy
- Update URLs (e.g., remove the proxy prefix)
- Associate portfolios with a license
- Activate/deactivate portfolios
- Delete portfolios
- Apply a library to manage the portfolios

Note: Will not update bibliographic records



Agenda



- Review Exercises
- Bulk Changes with “Change Electronic Portfolio Information” Job
- **Edit Single Portfolio with Portfolio Editor**
- Update Selective Packages
- Portfolio Loader
- Import Profile
- Deactivate / Delete Resources
- Further Resources

Agenda



- Review Exercises
- Bulk Changes with “Change Electronic Portfolio Information” Job
- Edit Single Portfolio with Portfolio Editor
- **Update Selective Packages**
- Portfolio Loader
- Import Profile
- Deactivate / Delete Resources
- Further Resources

Agenda



- Review Exercises
- Bulk Changes with “Change Electronic Portfolio Information” Job
- Edit Single Portfolio with Portfolio Editor
- Update Selective Packages
- **Portfolio Loader**
- Import Profile
- Deactivate / Delete Resources
- Further Resources

Portfolio Loader

- Excel (xls or xlsx) or KBART file
- Must have:
 - Correct headers
 - Data on portfolios in each row
- Get sample file from:
 - Ex Libris Knowledge Center
 - Collection's list of portfolios



Automatic Upload of Electronic Holdings

- Specific Collections from Ovid, Elsevier, Springer, PQ Ebook Central, Wiley, Taylor & Francis, and Project MUSE
- Collection must already be activated
- Configure appropriate “integration profile”
- Run the job (right now, or on a schedule)



Agenda



- Review Exercises
- Bulk Changes with “Change Electronic Portfolio Information” Job
- Edit Single Portfolio with Portfolio Editor
- Update Selective Packages
- Portfolio Loader
- **Import Profile**
- Deactivate / Delete Resources
- Further Resources

Purposes of Import Profiles

Upload into Alma the following records:

- In an EOD file from a vendor, with bib records and ordering information
- Exported from another library system
- And much more!



Agenda



- Review Exercises
- Bulk Changes with “Change Electronic Portfolio Information” Job
- Edit Single Portfolio with Portfolio Editor
- Update Selective Packages
- Portfolio Loader
- Import Profile
- **Deactivate / Delete Resources**
- Further Resources

Agenda



- Review Exercises
- Bulk Changes with “Change Electronic Portfolio Information” Job
- Edit Single Portfolio with Portfolio Editor
- Update Selective Packages
- Portfolio Loader
- Import Profile
- Deactivate / Delete Resources
- **Further Resources**

Documentation and Further Training

- [Managing Electronic Resources](#)
 - [Portfolio Editor](#)
 - [Portfolio Loader](#)
- [Change Electronic Portfolio Information](#)
- [Update Selective Packages](#)
- [Automatic Upload of Electronic Holdings](#)
- [Managing Import Profiles](#)
- [Alma Resources LibGuide \(see Electronic Resource Management\)](#)



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

- Bulk changes to portfolios
- Edit Single Portfolio
- Update Selective Packages
- Use Portfolio Loader
- Configure Import Profile

Download exercise file for details.

Bring any questions and issues to our next session.





Managing Electronic Resources

Next Week: Troubleshoot Discovery

Step-by-step troubleshooting of full-text linking issues, showing how various issues can cause broken links (inactive services and proxies, embargo dates, missing metadata in CDI, etc.)

Thank you!

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

