Managing Electronic Resources

ERM-201
Maintain E-Resources

Kevin Lane-Cummings and Rachel Bellavia
Customer Education Team

Alma

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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
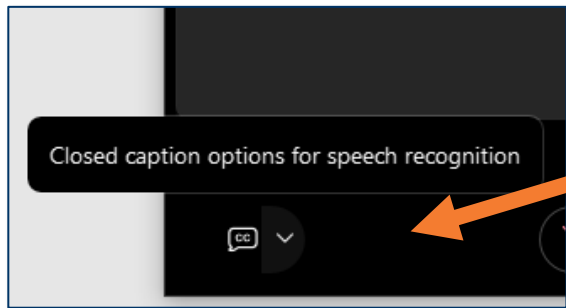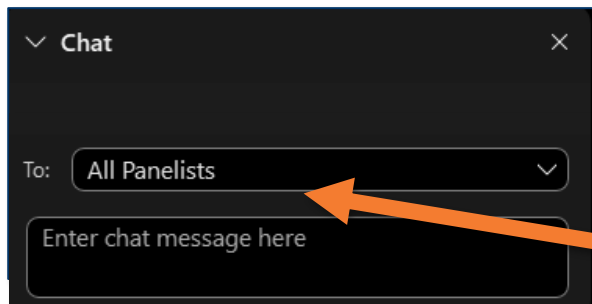- Turn captions on and off in the lower-left corner of the WebEx screen

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 05
201	**Maintain E-Resources**	**Oct 12**
202	Troubleshoot Discovery	Oct 19
203	Overlap Analysis	Oct 26
301	Usage Statistics, COUNTER, and SUSHI Harvesting	Nov 02
302	Analytics of E-Resources	Nov 09
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**
- 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

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Review Exercises

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

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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

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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)

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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!

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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](#)

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Upcoming Workshops | **Frequently Asked Questions** | **Contact Us**

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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)

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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.

SANDBOX ONLY!
(at first)

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.)

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Thank you!

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