

Managing Electronic Resources

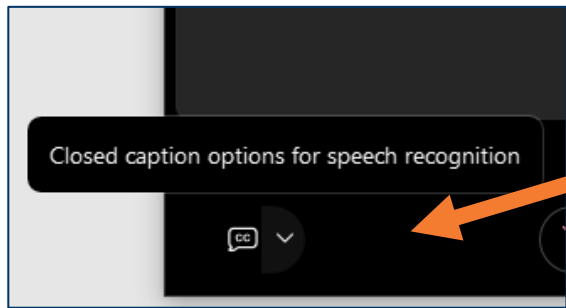
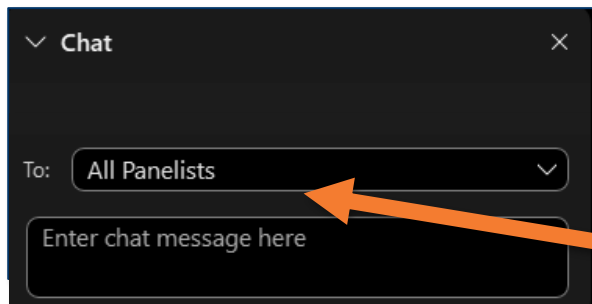


ERM Bonus 1 Contribute to the Community Zone Alma

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**
- Goals and Responsibilities of Contributing
- Edit CZ Bibliographic Records
- Contribute Local Electronic Portfolios
- Contribute Local Electronic Collections
- Further Resources

Review Exercises - Alma Analytics

- Explore default dashboards and reports
- Create new analyses



Agenda



- Review Exercises
- **Goals and Responsibilities of Contributing**
- Edit CZ Bibliographic Records
- Contribute Local Electronic Portfolios
- Contribute Local Electronic Collections
- Further Resources

Goals

- Everyone benefits from the work of cataloguers throughout the world
- Changes to CZ records automatically become part of all institutions' linked records



Contributions You Can Make

- Update CZ bib records
- Add portfolios to a few existing collections
- Contribute entire local collections

Contact Ex Libris
Support for your
institution to be given
contribution privileges



Alma Community Advisory Group

- Made up of Alma institution members and Ex Libris staff
- Determined how to open the Community Zone to other people contributing, while maintaining accurate content
- Created cataloging standards



Standards Document



Alma Community Catalog: Cataloging Standards, Policies, Rights, and Responsibilities



Some Key Responsibilities (in brief)

- Certify contributed records are free and unencumbered
- Only make changes that would benefit the quality of the record
- Not engage in any activity that would misrepresent or diminish the value of the Community Zone



Agenda



- Review Exercises
- Goals and Responsibilities of Contributing
- **Edit CZ Bibliographic Records**
- Contribute Local Electronic Portfolios
- Contribute Local Electronic Collections
- Further Resources

Edit CZ Bibliographic Records

- MARC 21
- Any fields except 022 (ISSN) and local extension fields
 - Use your IZ version of the record for local info
- Locked while editing
 - Others can see name of editor
- Release Record = Everyone gets the update!



Agenda



- Review Exercises
- Goals and Responsibilities of Contributing
- Edit CZ Bibliographic Records
- **Contribute Local Electronic Portfolios**
- Contribute Local Electronic Collections
- Further Resources

Contribute Portfolios to Certain CZ Collections

Conduct an Advanced Search in Alma:

- Electronic Collections
- Management Level in Community Zone = Community
- In Community Zone



Agenda

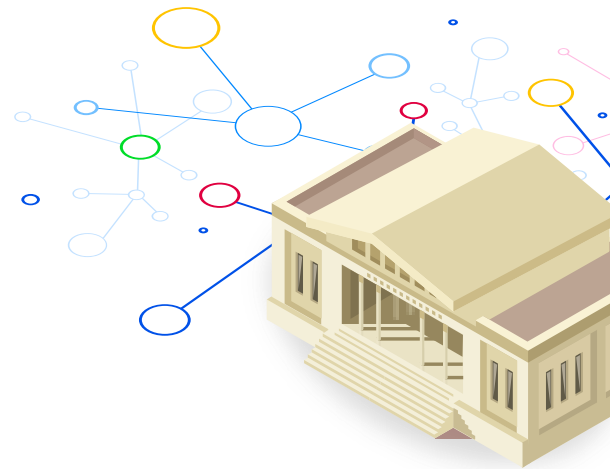


- Review Exercises
- Goals and Responsibilities of Contributing
- Edit CZ Bibliographic Records
- Contribute Local Electronic Portfolios
- **Contribute Local Electronic Collections**
- Further Resources

Requirements for Collections

Collections submitted for inclusion in the Community Zone must be:

- Academic in nature
- Relevant to other institutions
- Not already in the Community Zone



Requirements for Collections (cont.)

Collections submitted for inclusion in the Community Zone should include:

- Bib record describing the collection
- Parser and linking level
- Interface name
- Portfolios that reflect all relevant content that can be acquired as part of the collection
- Full bib record for each resource
- Linking information for each portfolio
- Coverage information for each serial



Agenda



- Review Exercises
- Goals and Responsibilities of Contributing
- Edit CZ Bibliographic Records
- Contribute Local Electronic Portfolios
- Contribute Local Electronic Collections
- **Further Resources**

Documentation

- [Community Zone Contribution Guidelines](#)
- [Contributing to the CZ - Bibliographic Records](#)
- [Contributing to the CZ - Portfolios](#)
- [Contributing to the CZ - Local Electronic Collections](#)
- [Contributing to the CZ - Databases](#)

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)
- Register for upcoming sessions
- Take the (optional) exam



The illustration shows a person with dark hair wearing a yellow shirt, sitting at a brown desk and working on a computer. To the right of the person is a tall, light-brown bookshelf filled with colorful books. Above the person and bookshelf are several circular icons: a document with a magnifying glass, a document with a checkmark, a document with a plus sign, and a document with a list. The background features large, light blue and green circles.

Managing Electronic Resources

Next Week: Automate Holdings Management for ProQuest Ebook Central

Thank you!

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

