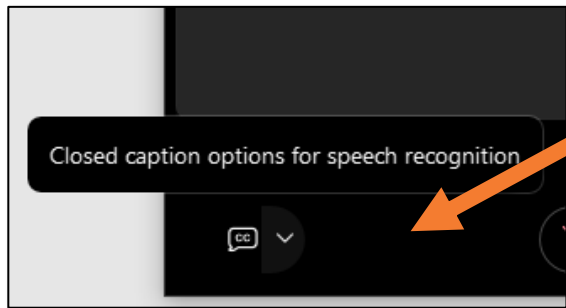
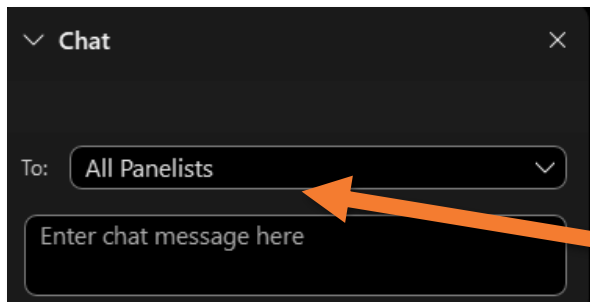




Acquisitions: Ordering, Activating, and Invoicing Electronic Resources

Jenny Draeger—Customer Education
Judith Mamou—Customer Care

A few points about WebEx

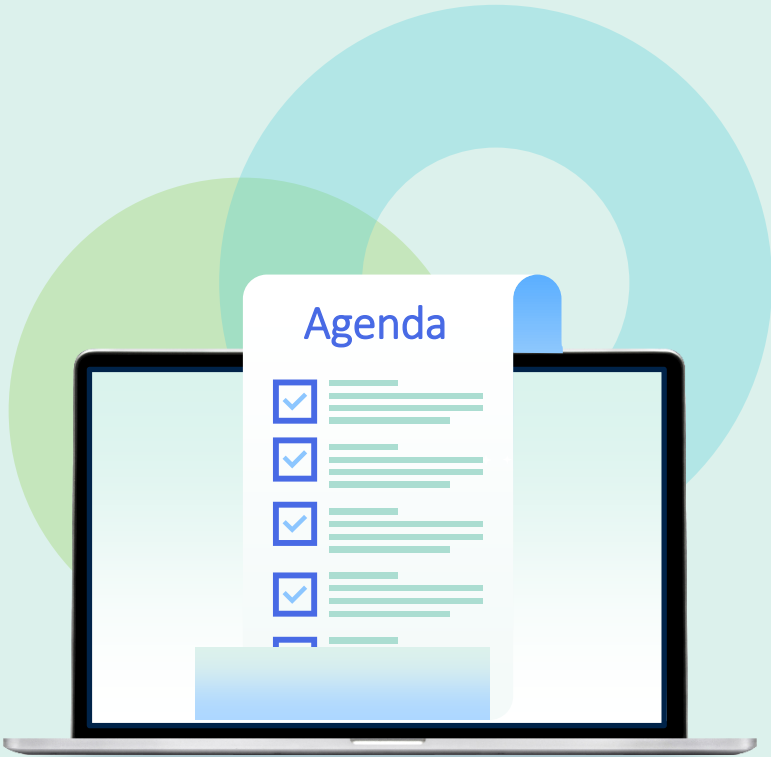


- Technical issues? Exit and rejoin the WebEx session.
- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu
- Turn captions on and off in the lower-left corner of the WebEx screen

KAP - Knowledge Acceleration Program

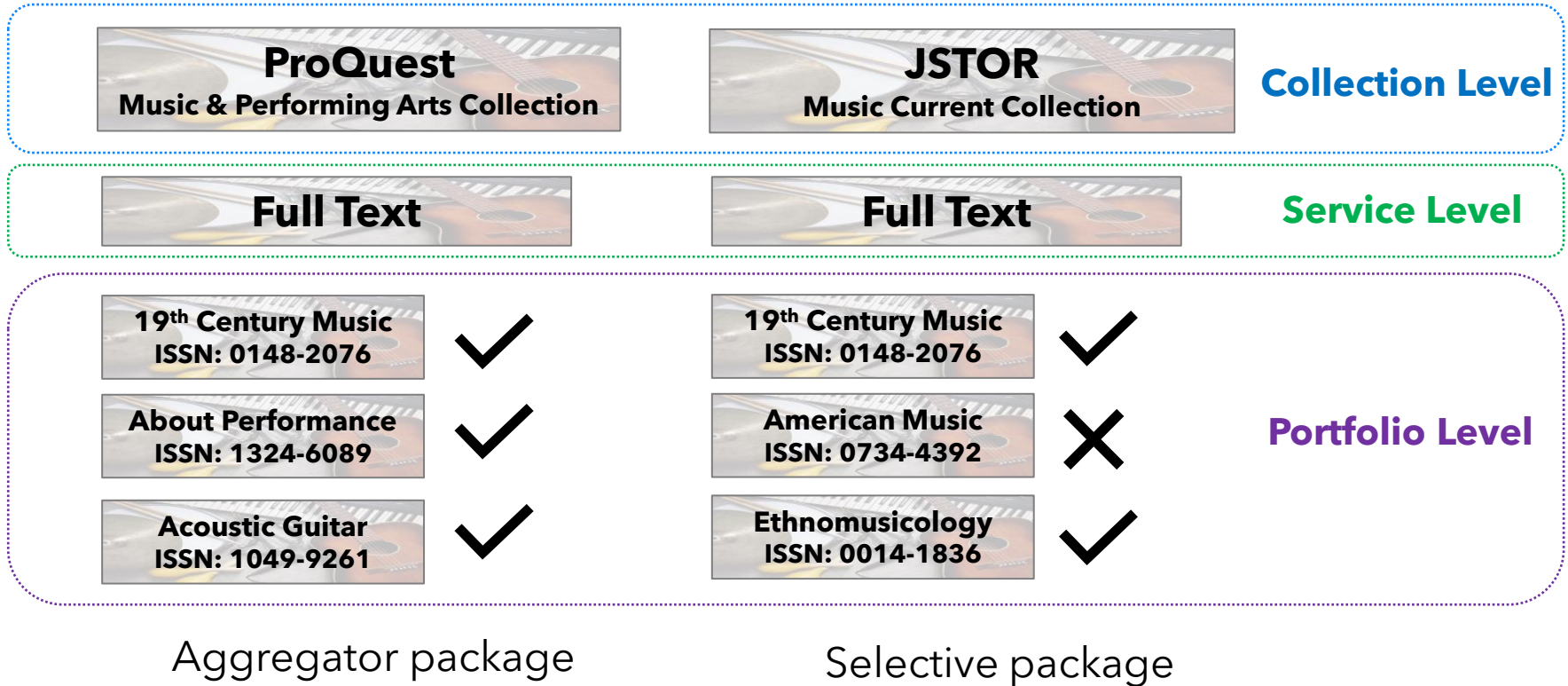


Session	Date
Fulfillment Configuration - Part I	6 Feb
Fulfillment Configuration - Part II	13 Feb
Acquisitions: Ordering and Activating Resources	20 Feb
Electronic Resource Management	27 Feb
Central Discovery Index (CDI)	5 Mar
Introduction to Analytics	12 Mar



- E-Resources Terminology
- Single Title (One-Time) from the CZ
- Electronic Collection (Continuous Subscription) from the CZ
- Create an Invoice
- Pay an Invoice

Inventory Model



Zones in Alma

Electronic Collections (1 - 20 of 136) | proquest

Institution Network Community

Sort by: Rank Search

1 **ProQuest Central (ProQuest Central)**
Type: Aggregator package
Services: Full Text (Available from: 04/16/2019)
Interface name: ProQuest
Linking Level: Article
Creation Date: 04/16/2019 18:59
Modification Date: 02/27/2020 19:50
Collection ID: 6150653990000121
MMS ID: 99236010900121
Available For Other details

2 **ProQuest KidQuest**
Type: Aggregator package
Services: Full Text (Available from: 05/28/2013)
Interface name: ProQuest
Linking Level: Article

Institution Zone (IZ): Your institution's bibliographic, holding, and item records, and electronic inventory

Community Zone (CZ): Shared repository of standard authority files, e-resource records, and administrative information about e-resources in a central knowledgebase

Network Zone (NZ): For institutions in a collaborative network (Consortia)

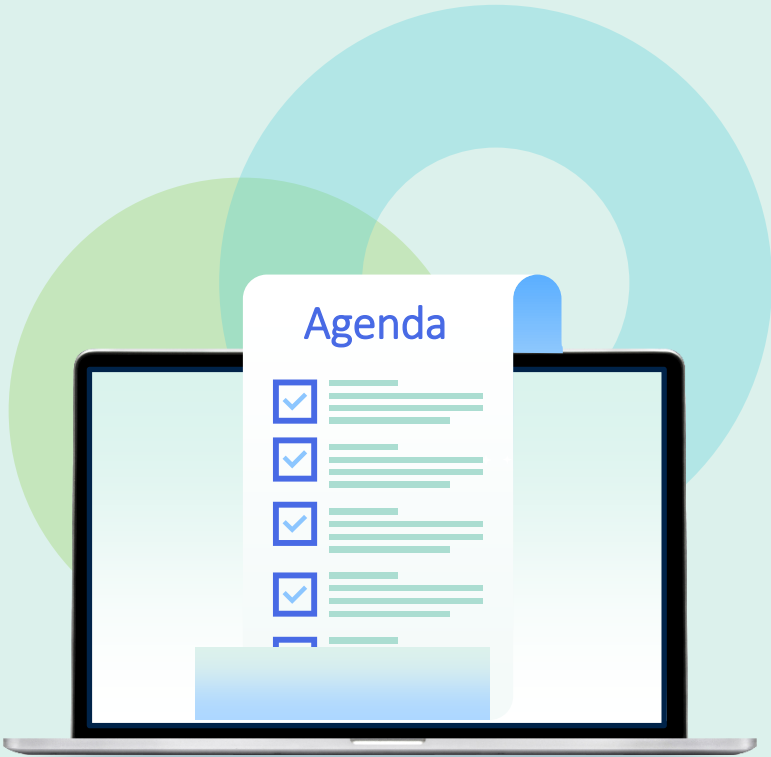
User Roles

User Roles				
1 - 7 of 7				
	<input type="checkbox"/>	Active	Role Name	Role Area
1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CDI Inventory Operator	Inventory
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Electronic Inventory Operator	Inventory
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Electronic Inventory Operator Extended	Inventory
4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	License Manager	Acquisitions
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Purchasing Manager	Acquisitions
6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Purchasing Operator	Acquisitions
7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Repository Manager	Inventory

- **Purchasing Operator/Manager**
- **CDI Inventory Operator**
- **Electronic Inventory Operator/Extended**
- **Repository Manager**
- **Invoice Operator/Manager**



- E-Resources Terminology
- **Single Title (One-Time) from the CZ**
- Electronic Collection (Continuous Subscription) from the CZ
- Create an Invoice
- Pay an Invoice



- E-Resources Terminology
- Single Title (One-Time) from the CZ
- **Electronic Collection (Continuous Subscription) from the CZ**
- Create an Invoice
- Pay an Invoice



- E-Resources Terminology
- Single Title (One-Time) from the CZ
- Electronic Collection (Continuous Subscription) from the CZ
- **Create an Invoice**
- Pay an Invoice



- E-Resources Terminology
- Single Title (One-Time) from the CZ
- Electronic Collection (Continuous Subscription) from the CZ
- Create an Invoice
- **Pay an Invoice**



Resources

Documentation

- Purchasing and Invoicing: [Alma Acquisitions](#)
- Activating Electronic Resources: [Alma Electronic Resource Management](#)
- Ex Libris Developer Network: [Finance Integration](#)



Premium Services - a more individualized approach



Premium Services are one-on-one services to customers that are interested in workflow optimization, individualized training, hands-on configuration, or other individualized assistance with Ex Libris products

Premium.Services@clarivate.com

Next Week: Electronic Resource Management

- Create and manage local e-resources
- Maintain e-resources
- Post-migration cleanup





Thank you!

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