ERM-101
Overview and Background

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Customer Education Team
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
Intended Audience for this Series

Everyone who manages (or will manage) e-resources in Alma is welcome to join all sessions!

• Brand-new to Alma? Try these first:
  • Getting to Know Alma
  • Alma Essentials

• Experienced with e-resources in Alma? Join us for the advanced sessions.
### Managing Electronic Resources Series

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Agenda

- General E-Resource Workflow
- Terminology
- Inventory Model in Alma
- Types of Electronic Portfolios
- User Roles
- Further Resources
E-Resources Workflow

Get bib data
Order resource *
Activate
Pay *
Maintain

* if needed
Agenda

• General E-Resource Workflow
• **Terminology**
• Inventory Model in Alma
• Types of Electronic Portfolios
• User Roles
• Resources
Collections, Portfolios, and Titles ... oh my!

• **Title:** Individual resource (book, journal, etc.), usually available from several vendors

• **Portfolio:** Single title from a specific vendor and (if available in a package) contained within a specific collection

• **Collection:** Group of portfolios that are titles made available together by a vendor (a.k.a.: “package,” “database”)
Collections, Portfolios, and Titles ... oh my! (cont.)

• Same title could be in several different portfolios. For example:
  • Provided by different vendors
  • Provided by one vendor in different packages (therefore, found in different Alma collections)
  • Available with different coverage dates

• Each portfolio has its own ID, to distinguish it from other portfolios of the same title: PID
Databases vs databases

• Vendors sometimes call their packages of titles “databases.”

HOWEVER!

• In Alma, a Database is a Collection with no portfolios
  • Usually a “package” of abstracting and indexing “citation-only” content
Agenda

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- **Inventory Model in Alma**
- Types of Electronic Portfolios
- User Roles
- Resources
P = Bibliographic record with holdings and items attached to holdings

E = Bibliographic record with portfolios. May be part of an electronic collection or "standalone"

D = Bibliographic record with digital representation, and digital objects attached to representation
Collections, Portfolios, and Services

**ProQuest**
Music & Performing Arts Collection

**JSTOR**
Music Current Collection

**Collection Level**

**ProQuest**
Music & Performing Arts Collection

**JSTOR**
Music Current Collection

**Service Level**

19th Century Music
ISSN: 0148-2076

About Performance
ISSN: 1324-6089

Acoustic Guitar
ISSN: 1049-9261

19th Century Music
ISSN: 0148-2076

American Music
ISSN: 0734-4392

Ethnomusicology
ISSN: 0014-1836

**Portfolio Level**

Aggregator package

Selective package

Database (no full text)
Electronic Resources Data Structure

Canadian social trends
Alma Search

- Electronic Collection
- Electronic Portfolio
- Electronic Title
- All Titles
Agenda

• General E-Resource Workflow
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• Inventory Model in Alma
• **Types of Electronic Portfolios**
• User Roles
• Resources
Electronic Portfolios - Types

• Journals (e-journals)

• Books (e-books)

Not databases (no portfolios)
Electronic Portfolios - Collection vs. Standalone

• Titles are usually sold as part of a package

(therefore)

• Portfolios are usually found in collections in Alma

• BUT! Portfolios can be standalone, not in a collection
Electronic Portfolios - Continuous vs. One-Time

• Continuous Purchase = Subscription
  • Renewal Dates
  • Automated or manual renewals
  • License limitations

• One-Time Purchase = Ownership
  • No renewal
  • License limitations
Demonstration in Alma
Agenda

• General E-Resource Workflow
• Terminology
• Inventory Model in Alma
• Types of Electronic Portfolios
• **User Roles**
• Resources
User Roles

• Purchasing Operator
• Purchasing Manager
• CDI Inventory Operator
• Electronic Inventory Operator
• Electronic Inventory Operator - Extended
• Electronic Inventory Operator - Limited
• Repository Manager
• Invoice Operator
• Invoice Manager

Specific roles for e-resources

Can link portfolio to another bib
Agenda

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- Resources
Documentation and Further Training

- **Managing Electronic Resources**
- **Alma LibGuide**
  - **Resources tab**
- **Video Training**
  - **Getting to Know Alma**
  - **Alma Essentials**
About Today’s Session, and Register for Next Week

- Download these presentation slides
- Watch the recording of this session
- Register for upcoming sessions (and see what content they will contain)
- Download exercises (but not for today’s session)
Next Week: Order and Activate Collections

• Order one-time and subscription collections
• Activate collections with E-Resource Activation Task List
• Test resources in discovery service
Thank you!

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