ERM-102
Order and Activate Collections

Kevin Lane-Cummings and Rachel Bellavia
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

<table>
<thead>
<tr>
<th>ERM</th>
<th>Session</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>101</td>
<td>Overview and Background</td>
<td>Sep 20</td>
</tr>
<tr>
<td>102</td>
<td><strong>Order and Activate Collections</strong></td>
<td><strong>Sep 27</strong></td>
</tr>
<tr>
<td>103</td>
<td>Order and Activate Portfolios</td>
<td>Oct 4</td>
</tr>
<tr>
<td>201</td>
<td>Maintain E-Resources</td>
<td>Oct 11</td>
</tr>
<tr>
<td>202</td>
<td>Troubleshoot Discovery</td>
<td>Oct 18</td>
</tr>
<tr>
<td>203</td>
<td>Overlap Analysis</td>
<td>Oct 25</td>
</tr>
<tr>
<td>301</td>
<td>Usage Statistics, COUNTER, and SUSHI Harvesting</td>
<td>Nov 1</td>
</tr>
<tr>
<td>302</td>
<td>Analytics of E-Resources</td>
<td>Nov 8</td>
</tr>
<tr>
<td>B-1</td>
<td>Contribute to the Community Zone</td>
<td>Nov 15</td>
</tr>
<tr>
<td>B-2</td>
<td>Upload Electronic Holdings for E-Book Central ...</td>
<td>Nov 29</td>
</tr>
</tbody>
</table>

ERM Exam
Agenda

• **Background and General Workflow**
• Order One-Time Collection from CZ
• Order Subscription Collection from CZ
• Activate Collection
• Activate with “My Electronic Resources by Provider”
• Further Resources
Why Order E-Resources in Alma?

- Track expenses, through ledgers and funds
- Combine with usage data to get cost/use in analytics
- Automate ordering with vendors (EDI, etc.)
- Speed up re-ordering, renewing, etc.
Why Activate E-Resources in Alma?

• Provide access to resources through your Discovery service.

(Well, I guess you could manually add URLs of e-resources on library web pages?)
Order Workflow

1. Acquire Bibliographic Record
2. Choose One-Time or Subscription
3. Choose License, Access Model, and Access Provider
4. Set Renewal Dates (subscription)
5. Place Order (manually or EDI or email)

Unique to e-resources

From CZ or Vendor or 3rd party
Activation Workflow

Activate electronic resource

Test Access

Confirm available to patrons

Renew order (if subscription)

NOTE: You can activate without ordering!

After vendor (or access provider) has authorized access

Before subscription is over

© 2023 Ex Libris | Confidential & Proprietary
Agenda

- Background and General Workflow
- **Order One-Time Collection from CZ**
- Order Subscription Collection from CZ
- Activate Collection
- Activate with “My Electronic Resources by Provider”
- Further Resources
Prerequisites

• Vendor and fund must already be set up
  • Different vendor for online-resource access ("access provider")? Also must be set up.

• License already be set up (optional)
  • If you track licenses in Alma
  • Can be added later
• Background and General Workflow
• Order One-Time Collection from CZ
• **Order Subscription Collection from CZ**
• Activate Collection
• Activate with “My Electronic Resources by Provider”
• Further Resources
Agenda

• Background and General Workflow
• Order One-Time Collection from CZ
• Order Subscription Collection from CZ
• **Activate Collection**
  • Activate with “My Electronic Resources by Provider”
• Further Resources
Agenda

- Background and General Workflow
- Order One-Time Collection from CZ
- Order Subscription Collection from CZ
- Activate Collection
- **Activate with “My Electronic Resources by Provider”**
- Further Resources
• Background and General Workflow
• Order One-Time Collection from CZ
• Order Subscription Collection from CZ
• Activate Collection
• Activate with “My Electronic Resources by Provider”
• Further Resources
Documentation and Further Training

- Managing Electronic Resources
- Alma LibGuide
  - Resources tab (see ERM section)
  - Acquisitions tab
- My Electronic Resources by Provider
- Activating Electronic Resources from the Community Zone
Premium Workshops

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 recording of this session (and the previous session)
• Download practice exercises
• Register for upcoming sessions (and see what content they will contain)
Exercises

• Order and activate an electronic collection from the CZ

Download exercise file for details.

Bring any questions and issues to our next session.
Next Week: Order and Activate Portfolios

- Order single, subscription portfolio
- Activate portfolio
- Create local collection
- Create local portfolio
Thank you!

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