Managing Electronic Resources

ERM-103
Order and Activate Portfolios

Kevin Lane-Cummings and Jenny Draeger
Customer Education Team

Alma
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

<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>Order and Activate Collections</td>
<td>Sep 27</td>
</tr>
<tr>
<td><strong>103</strong></td>
<td><strong>Order and Activate Portfolios</strong></td>
<td><strong>Oct 4</strong></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

- Review Exercises
- General Workflow
- Order Subscription Portfolio from CZ
- Activate Single Portfolio
- View Activated Resource in Discovery
- Create Local Collection
- Create Local Portfolio
- Further Resources
Review Exercises

• Order Subscription Collection from CZ
• Activate Collections
Agenda

• Review Exercises
• **General Workflows**
• Order Subscription Portfolio from CZ
• Activate Single Portfolio
• View Activated Resource in Discovery
• Create Local Collection
• Create Local Portfolio
• Further Resources
Order Workflow

Same as for collections!

- Acquire Bibliographic Record
- Choose One-Time or Subscription
- Choose License, Access Model, and Access Provider
- Set Renewal Dates (if subscription)
- Place Order (manually or EDI or email)

Unique to e-resources

From CZ or Vendor or third-party
Activation Workflow

Same as for collections!

- **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

• Review Exercises
• General Workflow
• **Order Subscription Portfolio from CZ**
  • Activate Single Portfolio
  • View Activated Resource in Discovery
• Create Local Collection
• Create Local Portfolio
• Further Resources
Agenda

- Review Exercises
- General Workflow
- Order Subscription Portfolio from CZ
- **Activate Single Portfolio**
- View Activated Resource in Discovery
- Create Local Collection
- Create Local Portfolio
- Further Resources
Agenda

- Review Exercises
- General Workflow
- Order Subscription Portfolio from CZ
- Activate Single Portfolio

**View Activated Resource in Discovery**

- Create Local Collection
- Create Local Portfolio
- Further Resources
Agenda

- Review Exercises
- General Workflow
- Order Subscription Portfolio from CZ
- Activate Single Portfolio
- View Activated Resource in Discovery
- **Create Local Collection**
- Create Local Portfolio
- Further Resources
Why Create a Local Collection?

• Vendor collection not in Community Zone

• Organize portfolios into your own “package”
  • Especially if they are local portfolios
Agenda

- Review Exercises
- General Workflow
- Order Subscription Portfolio from CZ
- Activate Single Portfolio
- View Activated Resource in Discovery
- Create Local Collection
- **Create Local Portfolio**
- Further Resources
Sources of Bib Records for Local Portfolios

• Cataloger creates it in Metadata Editor

• Outside source (vendor; national library; etc.)

• You create it in Local Collection editor
Agenda

• Review Exercises
• General Workflow
• Order Subscription Portfolio from CZ
• Activate Single Portfolio
• View Activated Resource in Discovery
• Create Local Collection
• Create Local Portfolio
• **Further Resources**
Documentation and Further Training

- Managing Electronic Resources
  - Adding a Local Electronic Collection
  - Adding a Standalone Portfolio
- Alma Resources LibGuide (see Electronic Resource Management)
- 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 recordings of this session (and previous sessions)
• Download practice exercises
• Register for upcoming sessions (and see what content they will contain)
Exercises

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

Download exercise file for details.

Bring any questions and issues to our next session.
Next Week: Ongoing E-Resource Maintenance

• Configure Import Profile
• Use Portfolio Loader
• Update Selective Packages
• And More!
Thank you!

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