ERM-103
Order and Activate Portfolios

Kevin Lane-Cummings and Jenny Draeger
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
## Managing Electronic Resources Series

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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
Agenda

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- Order Subscription Portfolio from CZ
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**View Activated Resource in Discovery**

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

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- Activate Single Portfolio
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- 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.