ERM-201
Maintain E-Resources

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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
# Managing Electronic Resources Series

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Agenda

• **Review Exercises**

• Bulk Changes with “Change Electronic Portfolio Information” Job

• Edit Single Portfolio with Portfolio Editor

• Update Selective Packages

• Portfolio Loader

• Import Profile

• Deactivate / Delete Resources

• Further Resources
Review Exercises

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

- Review Exercises
- **Bulk Changes with “Change Electronic Portfolio Information” Job**
- Edit Single Portfolio with Portfolio Editor
- Update Selective Packages
- Portfolio Loader
- Import Profile
- Deactivate / Delete Resources
- Further Resources
Changes to All Portfolios in a Set

• Remove local coverage
• Set a proxy
• Update URLs (e.g., remove the proxy prefix)
• Associate portfolios with a license
• Activate/deactivate portfolios
• Delete portfolios
• Apply a library to manage the portfolios

Note: Will not update bibliographic records
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• Review Exercises
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• Import Profile
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• Further Resources
Portfolio Loader

• Excel (xls or xlsx) or KBART file
• Must have:
  • Correct headers
  • Data on portfolios in each row

• Get sample file from:
  • Ex Libris Knowledge Center
  • Collection’s list of portfolios
Automatic Upload of Electronic Holdings

• Specific Collections from Ovid, Elsevier, Springer, PQ Ebook Central, Wiley, Taylor & Francis, and Project MUSE

• Collection must already be activated

• Configure appropriate “integration profile”

• Run the job (right now, or on a schedule)
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Purposes of Import Profiles

Upload into Alma the following records:

• In an EOD file from a vendor, with bib records and ordering information

• Exported from another library system

• And much more!
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• Further Resources
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**Further Resources**
Documentation and Further Training

- Managing Electronic Resources
  - Portfolio Editor
  - Portfolio Loader
- Change Electronic Portfolio Information
- Update Selective Packages
- Automatic Upload of Electronic Holdings
- Managing Import Profiles
- Alma Resources LibGuide (see Electronic Resource Management)
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

• Bulk changes to portfolios
• Edit Single Portfolio
• Update Selective Packages
• Use Portfolio Loader
• Configure Import Profile

Download exercise file for details.

Bring any questions and issues to our next session.
Next Week: Troubleshoot Discovery

Step-by-step troubleshooting of full-text linking issues, showing how various issues can cause broken links (inactive services and proxies, embargo dates, missing metadata in CDI, etc.)
Thank you!

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