

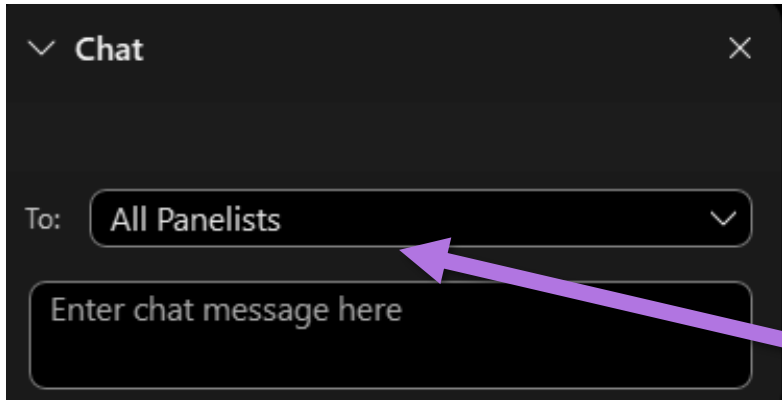
Managing  
Electronic  
Resources

# ERM-101 Overview and Background

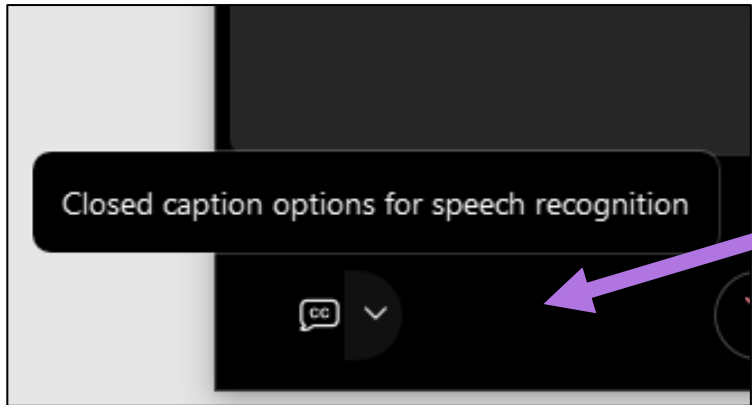
Kevin Lane-Cummings and Jenny Draeger  
Ex Libris Customer Education

March 2025

# A Few Points About WebEx



- Technical issues? Exit and rejoin the WebEx session
- This session is being recorded
- 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!

Experienced with e-resources in Alma?  
Join us for the advanced sessions.

**Brand-new to Alma?**  
**Try these first:**

- [Getting to Know Alma](#)
- [Alma Essentials](#)

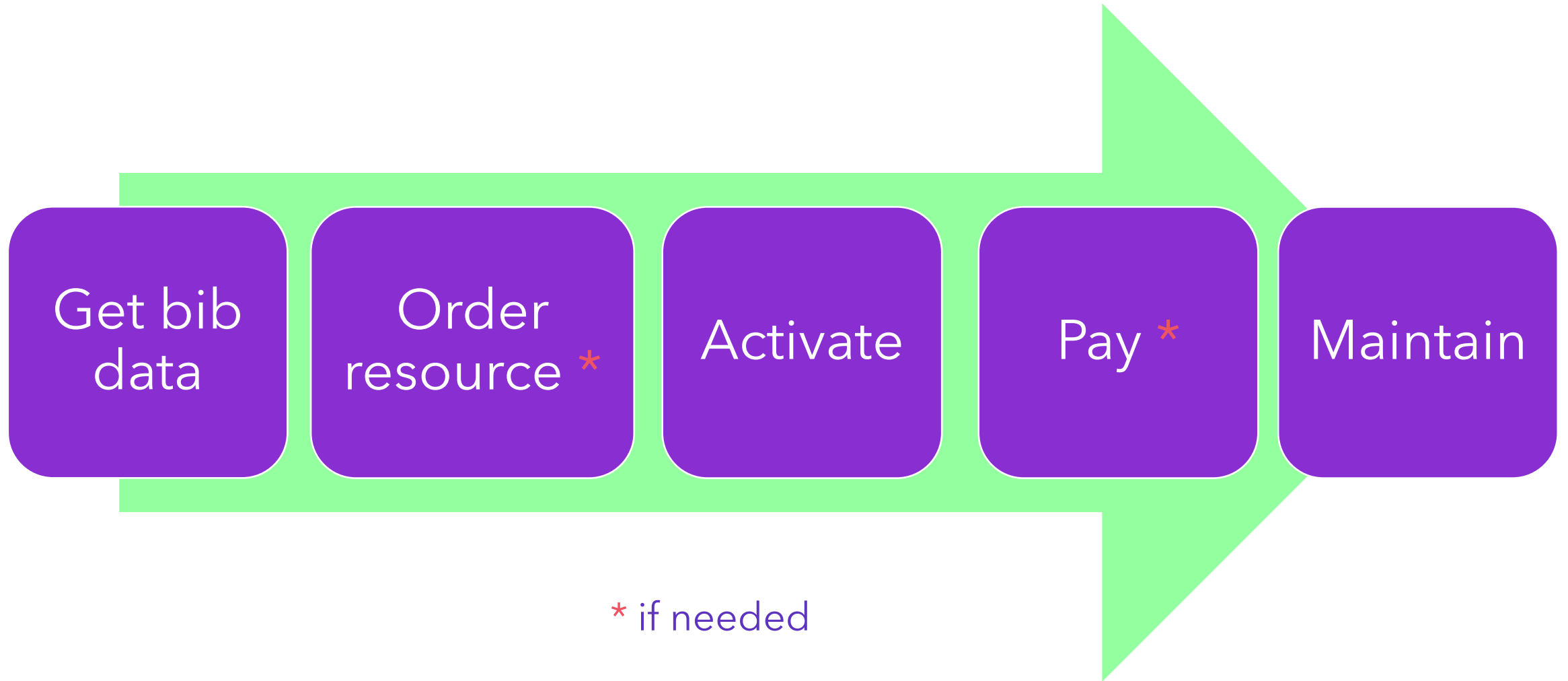
# Managing Electronic Resources Series

ERM	Session	Date
<b>101</b>	<b>Overview and Background</b>	<b>Mar 19</b>
102	Order and Activate Collections	Mar 26
103	Order and Activate Portfolios	Apr 2
201	Maintain E-Resources	Apr 9
202	Troubleshoot Discovery	Apr 16
203	Overlap Analysis	Apr 23
301	Usage Statistics, COUNTER, and SUSHI Harvesting	Apr 30
302	Analytics of E-Resources	May 7
B-1	Contribute to the Community Zone	May 14
B-2	Upload Electronic Holdings Automatically	May 21

# Agenda

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

# E-Resources Workflow



# Agenda

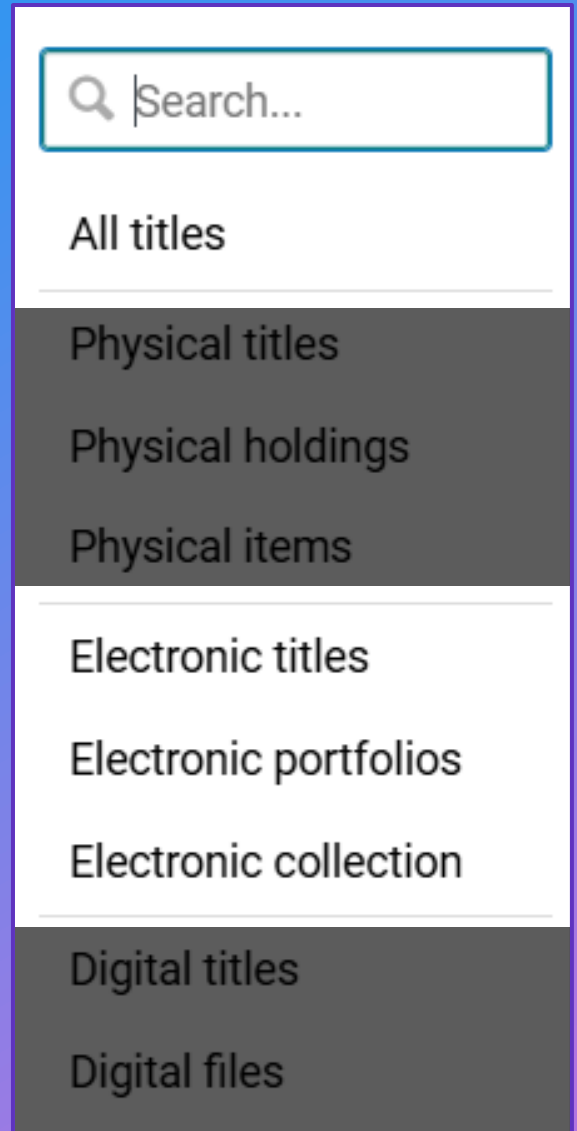
- General E-Resource Workflow
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# Collections, Portfolios, and Titles ... oh my!

**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 (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


1	Portfolio ID 53358000000014841 Electronic Material Type Journal Coverage Available from 1937 until 1950. Interface <a href="#">EBSCOhost</a> Service Type - Collection Name EBSCOhost Library & Information Science Source
2	Portfolio ID 534340000001787896 Electronic Material Type Journal Coverage Available from 1883 volume: 1 issue: 1 until 1960 volume: 173 issue: 8. Interface American Medical Association Service Type Full Text Collection Name Bacon American Medical Association Global Alltitles \$AMA_GLOBAL_ALLTITLES
3	Portfolio ID 535490000003698142 Electronic Material Type Journal Coverage Available from 1883 until 1960. Interface Reprints Desk Service Type Full Text Collection Name Reprints Desk Article

# 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

	<b>American Civil War Research Database</b>	
	<b>Type:</b> Database	<b>Collection ID:</b> 6187879680000541
	<b>Interface name:</b> Alexander Street	<b>MMS ID:</b> 99253715300541
	<b>Creation Date:</b>	

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# Bib Records: Physical vs Electronic vs Digital

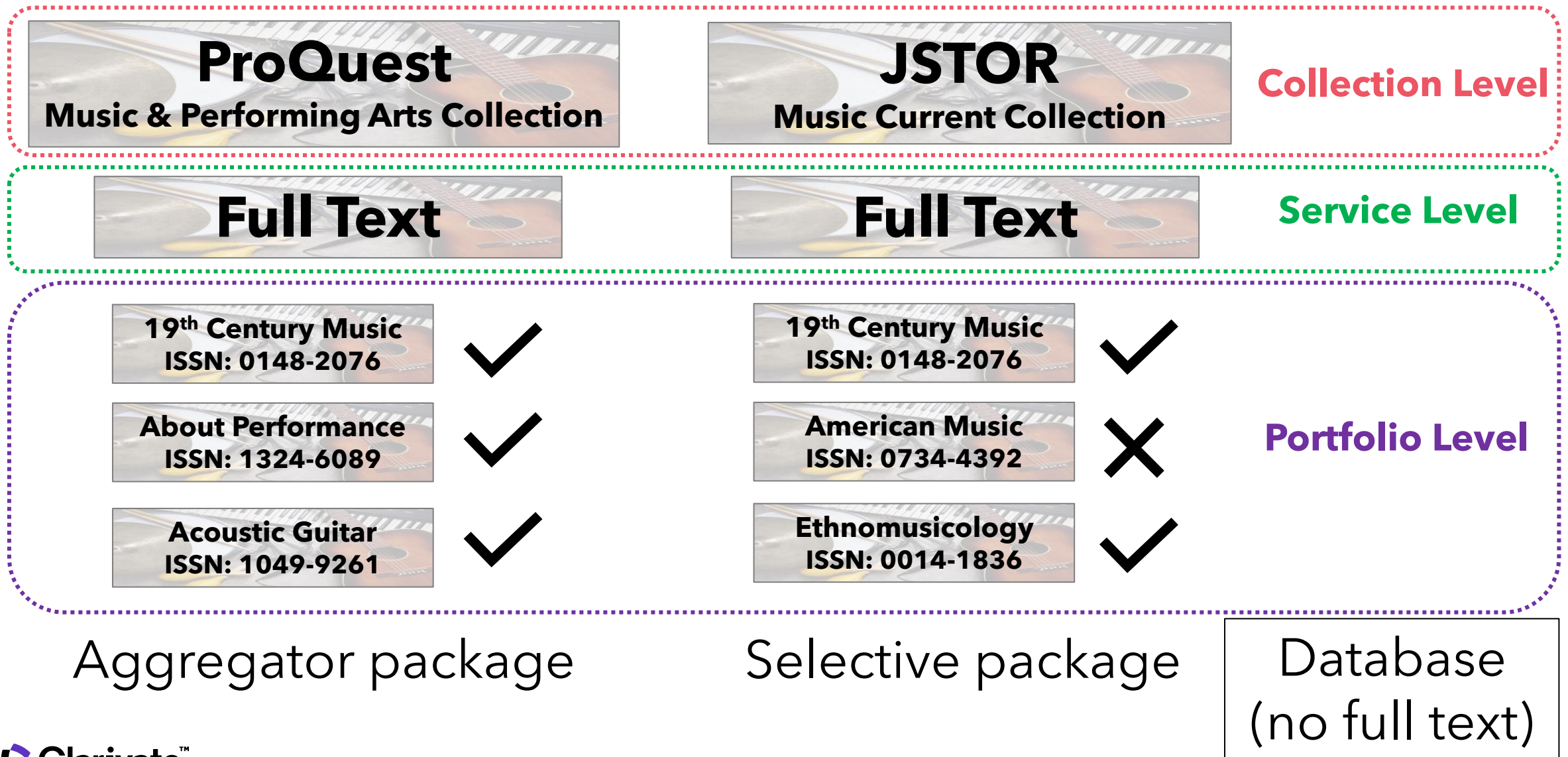
**P** = Bibliographic record with holdings and items attached to holdings

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

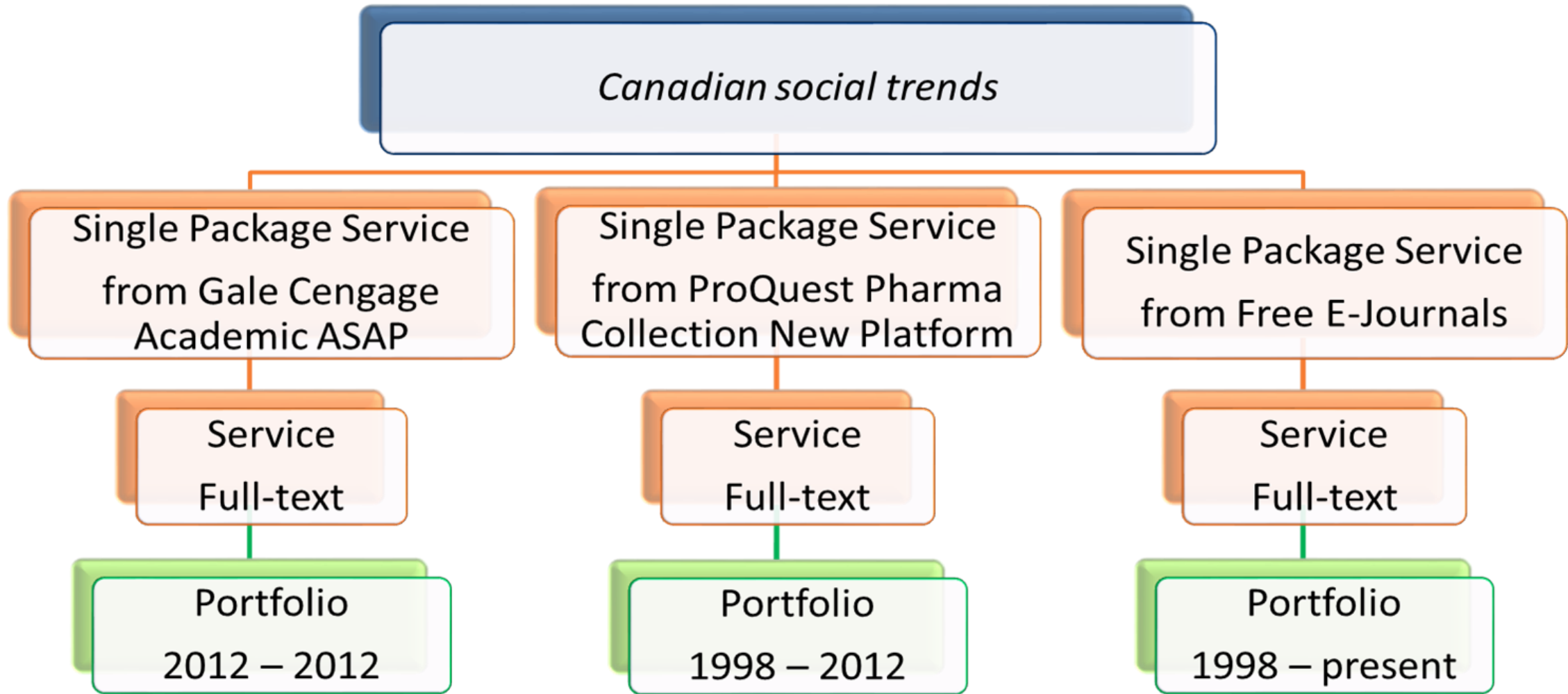
**D** = Bibliographic record with digital representation, and digital objects attached to representation

Subject of  
this ERM  
Course

# Collections, Services, and Portfolios



# Electronic Resources Data Structure



# Alma Search

The screenshot displays the Alma Search interface. At the top, there is a search bar with a magnifying glass icon on the left and a search icon on the right. Below the search bar, there are two dropdown menus: "Electronic collection" and "Electronic Collection Name".

The "Electronic collection" dropdown menu is open, showing the following options:

- All titles
- Physical titles
- Physical holdings
- Physical items
- Electronic titles
- Electronic portfolios
- Electronic collection
- Digital titles
- Digital files

The "Electronic Collection Name" dropdown menu is also open, showing the following options:

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

On the right side of the interface, there is a "Search Zone" dropdown menu with the following options:

- Institution
- Network
- Community

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# Electronic Portfolios - Types

- Journals (e-journals)
- Books (e-books)
- Other media (datasets, audio, video, etc.)

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

The screenshot displays the ExLibris Alma user interface. At the top, there is a navigation bar with the ExLibris logo, a search bar containing 'Electronic collection' and 'Electronic Collection Name', and various utility icons. A left-hand navigation menu includes options for Alma Production, Market, Acquisitions, Resources, Show MDE, and Configuration.

The main content area is titled 'Welcome' and features a row of quick links: Recent Pages, Monitor Jobs (Administration), Publishing Pro... (Discovery), Scan In Items (Fulfillment), Access Analyti... (Analytics), and Manage Sets (Administration).

Below the quick links are three primary panels:

- Tasks:** A list of task categories with counts and arrows: Purchase Requests (2), Borrowing Requests (4), Other Requests (5), Order Lines (48), Electronic Resources (7), Trials (2), Reading Lists (9), and Citations (7).
- Missing Items:** A table with the heading 'Missing Items' and a sub-link 'Open in a new window'. The table lists items with columns for 'Item Id to be used by DARA (do not touch)', 'Library', 'Location Name', and 'Permanent Call Number'.
 

Item Id to be used by DARA (do not touch)	Library	Location Name	Permanent Call Number
235662200000541	Main Library	Main Juvenile Education Collection	PZ7.P75181 Ke 1988
235855990000541	Science Library	Science Stacks	G465 .W43: 2008
234001540000541	Science	Science	QC21.2 .T5
- Active Loans for Review:** A table with the heading 'Active Loans for Review' and a sub-link 'Open in a new window'. The table lists active loans with columns for 'Library Name', 'User Primary Identifier', 'Barcode', and 'Title'.
 

Library Name	User Primary Identifier	Barcode	Title
Main Library	None	39472	Th loy wri the Re er: an Ca Cr: by Jol
		40884	Th Re

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# User Roles

Specific roles  
for e-resources

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

User Roles			
1 - 7 of 7			
<input type="checkbox"/>	Active	Role Name	Role Area
1 <input type="checkbox"/>	<input checked="" type="checkbox"/>	CDI Inventory Operator	Inventory
2 <input type="checkbox"/>	<input checked="" type="checkbox"/>	Electronic Inventory Operator	Inventory
3 <input type="checkbox"/>	<input checked="" type="checkbox"/>	Electronic Inventory Operator Extended	Inventory
4 <input type="checkbox"/>	<input checked="" type="checkbox"/>	License Manager	Acquisitions
5 <input type="checkbox"/>	<input checked="" type="checkbox"/>	Purchasing Manager	Acquisitions
6 <input type="checkbox"/>	<input checked="" type="checkbox"/>	Purchasing Operator	Acquisitions
7 <input type="checkbox"/>	<input checked="" type="checkbox"/>	Repository Manager	Inventory

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# Documentation and More Training

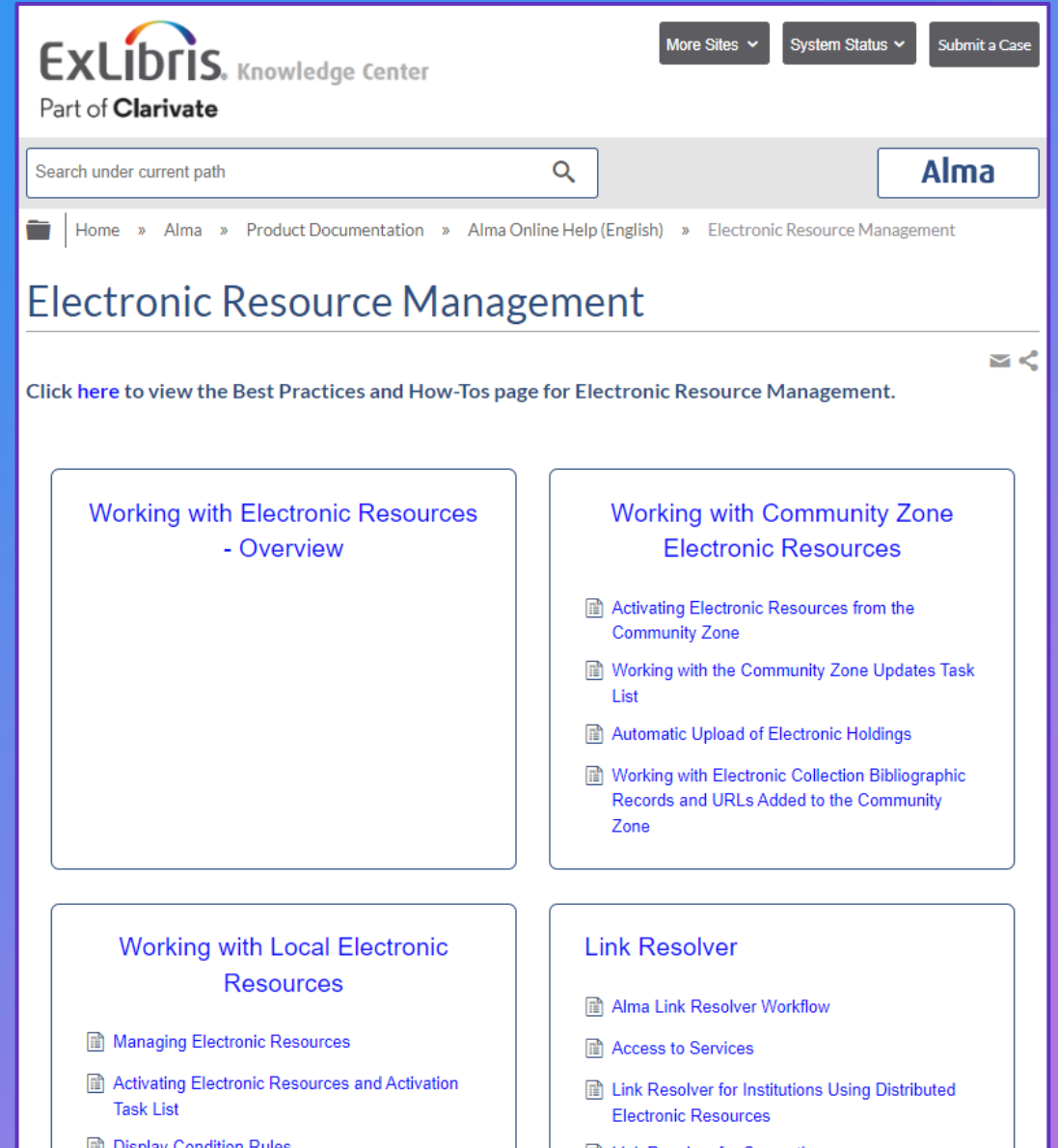
## Managing Electronic Resources

### Alma LibGuide

- Resources tab

### Video Training

- Getting to Know Alma
- Alma Essentials



The screenshot displays the ExLibris Knowledge Center interface. At the top, the logo for ExLibris Knowledge Center is visible, along with navigation links for 'More Sites', 'System Status', and 'Submit a Case'. Below the logo, there is a search bar and a button labeled 'Alma'. The main content area is titled 'Electronic Resource Management' and includes a breadcrumb trail: Home » Alma » Product Documentation » Alma Online Help (English) » Electronic Resource Management. A message prompts the user to click a link for Best Practices and How-Tos. The page is organized into four columns of content:

- Working with Electronic Resources - Overview**
- Working with Community Zone Electronic Resources**
  - Activating Electronic Resources from the Community Zone
  - Working with the Community Zone Updates Task List
  - Automatic Upload of Electronic Holdings
  - Working with Electronic Collection Bibliographic Records and URLs Added to the Community Zone
- Working with Local Electronic Resources**
  - Managing Electronic Resources
  - Activating Electronic Resources and Activation Task List
  - Display Condition Rules
- Link Resolver**
  - Alma Link Resolver Workflow
  - Access to Services
  - Link Resolver for Institutions Using Distributed Electronic Resources
  - Link Resolver for Community

# About Today's Session, and Register for Next Week

[Ex Libris Knowledge Center](#) > [Alma](#) > [Training](#) > [Webinars](#) > [E-Resource Management](#)

- 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 subscription collections
- Activate collections with E-Resource Activation Task List
- Test resources in discovery service



The screenshot displays the ExLibris discovery service interface. At the top, there are navigation tabs for 'RESEARCH ASSISTANT BETA', 'LIBRARY SEARCH', 'JOURNAL SEARCH', 'BROWSE SEARCH', 'DATABASE SEARCH', and 'COLLECTION DISCOVERY'. The search bar contains the text 'Critical Test Results Troubleshooter'. Below the search bar, there are options for 'Expand your results', 'Results beyond my collection', 'Sort by Relevance', 'Availability', 'Subject', 'Resource Type', 'Collection', 'Creation Date', and 'Language'. The results list shows two book chapters by Gayla J. Jackson from the year 2006. The first result is 'CHAPTER 3: What is critical?; Jackson, Gayla J' and the second is 'CHAPTER 6: Who gets the call?; Jackson, Gayla J'. Both results include a 'Read Online' link and an 'Available Online' link.



Thank You!

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

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