

Managing
Electronic
Resources

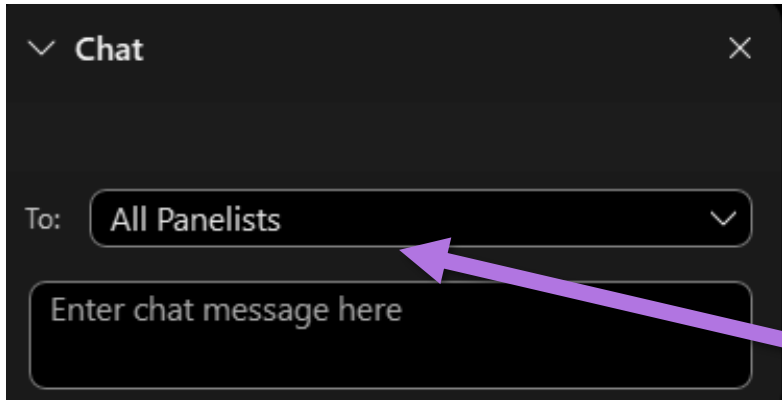
ERM-102

Order and Activate Collections

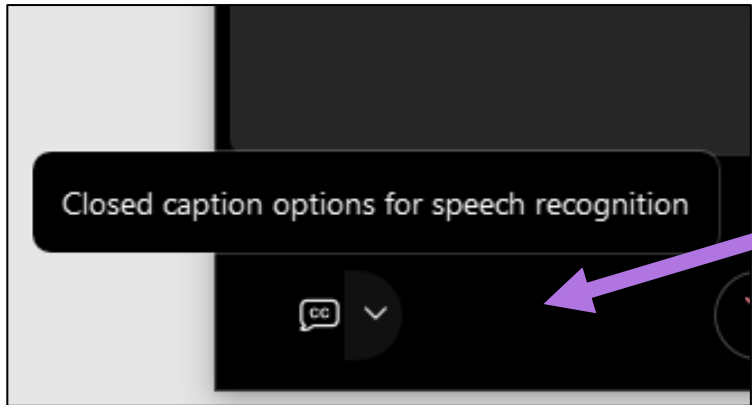
Ex Libris Customer Education

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



Managing Electronic Resources Series

ERM	Session	Date
101	Overview and Background	Mar 19
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

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](#)

Agenda

- Background and General Workflow
- Order Subscription Collection from CZ
- Activate Collection
- 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.

Cost Usage By Electronic collections

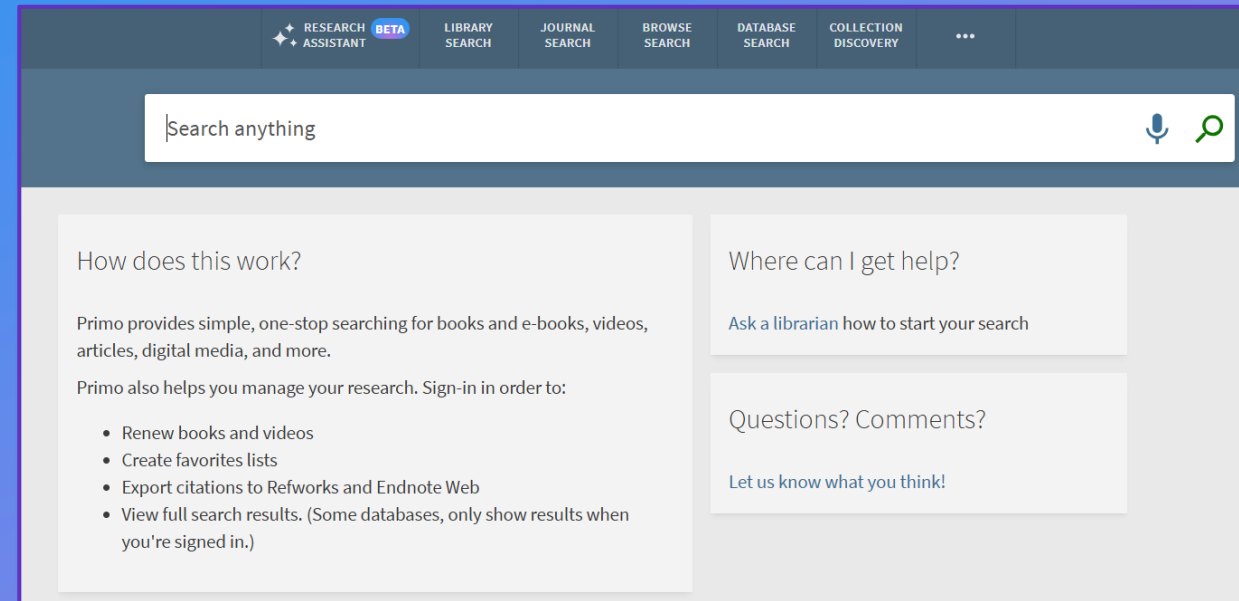
Electronic Collection Public Name	Platform (from COUNTER report)	No. of Portfolio (In Repository)	Cost	Usage	Cost Per Use ▲▼
Periodicals Archive Online Collection 3.4	ProQuest	26	4,594.59	46.58	98.63
Linguistics Database	ProQuest	48	900.00	72.50	12.41
Public Health Database	ProQuest	210	2,364.12	454.13	5.21
ProQuest Nursing & Allied Health Source New Platform	ProQuest	312	2,743.40	1,226.80	2.24
APA PsycArticles®	ProQuest	4	15.86	11.00	1.44
Research Library	ProQuest	1,172	2,991.37	7,676.40	0.39
Materials Science Database	ProQuest	91	84.49	272.58	0.31

Why Activate E-Resources in Alma?

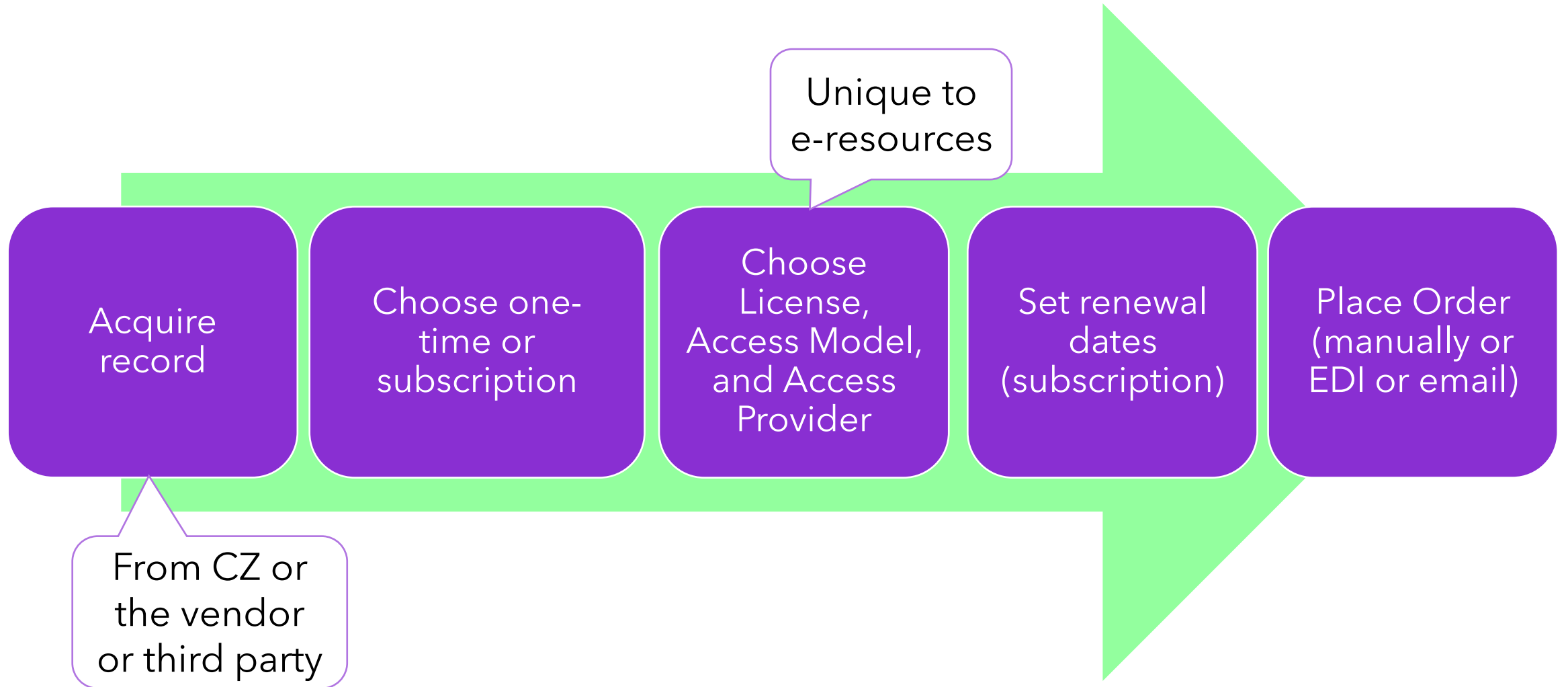
Provide patron access to resources through your Discovery service

(Unless you want to manually add URLs of e-resources on library web pages?!))

Note: You can activate an e-resource without ordering it!

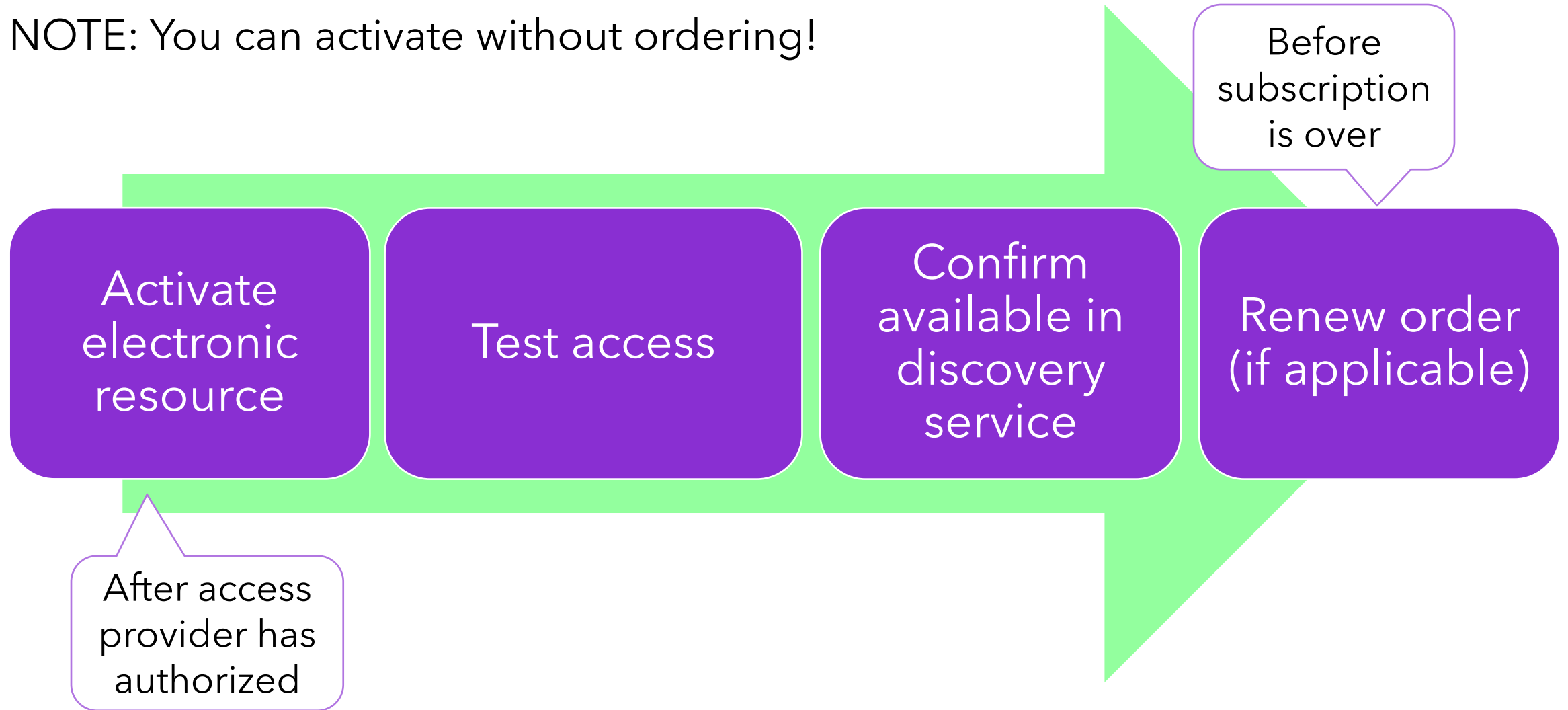


Order Workflow



Activation Workflow

NOTE: You can activate without ordering!



Agenda

- Background and General Workflow
- **Order Subscription Collection from CZ**
- Activate Collection
- 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 may already be set up (optional)

- If you track licenses in Alma
- Can be added later

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Documentation and More Training

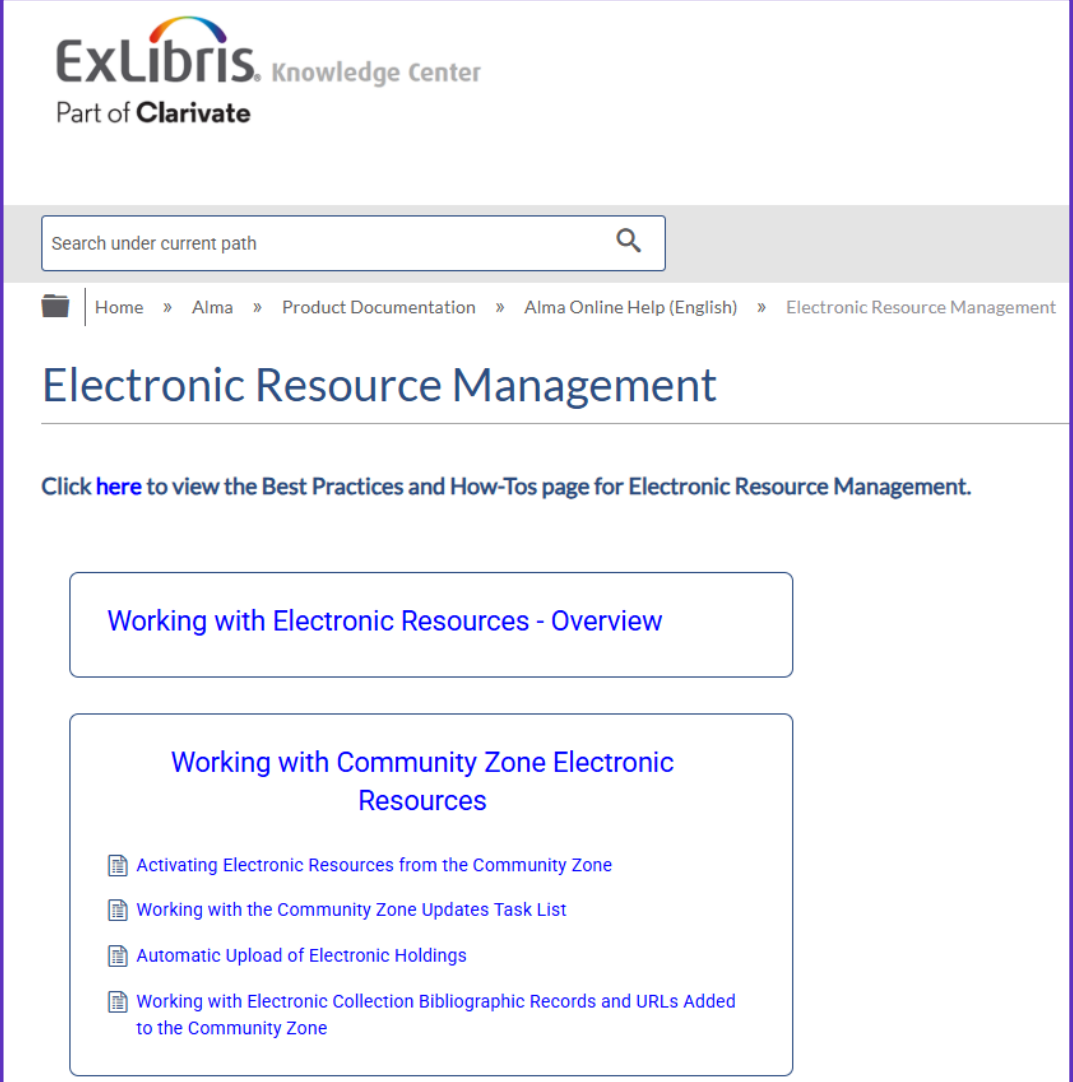
Electronic Resource Management

Alma LibGuide

- Resources tab (see ERM section)
- Acquisitions tab

My Electronic Resources by Provider

Activating Electronic Resources from the Community Zone



The screenshot shows the ExLibris Knowledge Center website, which is part of Clarivate. The page is titled "Electronic Resource Management" and includes a search bar, a breadcrumb trail, and a list of links for further information.

ExLibris Knowledge Center
Part of Clarivate

Search under current path

Home » Alma » Product Documentation » Alma Online Help (English) » Electronic Resource Management

Electronic Resource Management

Click [here](#) to view the Best Practices and How-Tos page for Electronic Resource Management.

[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](#)

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
- Download exercises
- Register for upcoming sessions
(and see what content they will contain)

Exercises

All the workflow steps to 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

Create Inventory

- ★ Add Local Electronic Collection
- Add Local Portfolio





Thank You!

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

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