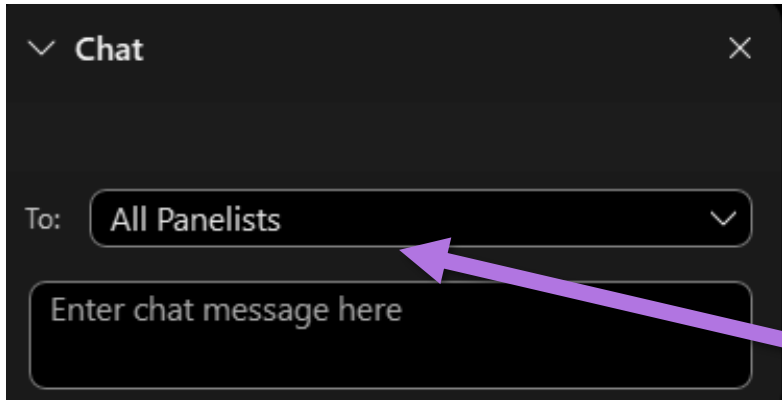


Managing
Electronic
Resources

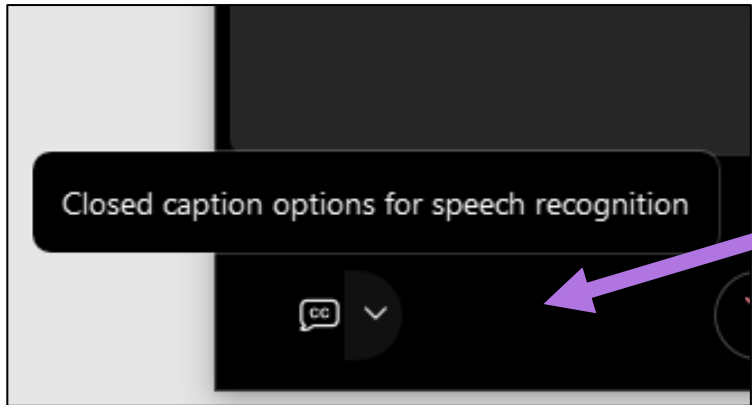
ERM-201 Maintain E-Resources

April 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

Agenda

- **Bulk Changes with “Change Electronic Portfolio Information” Job**
- 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

Agenda

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Portfolio Loader

- Excel (xls orxlsx) 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 participating vendors
 - Springer, Sage, Elsevier, ProQuest Ebook Central, Ovid, Wiley, Taylor & Francis, Project MUSE, JSTOR, Preselect
- Collection must already be activated
- Configure appropriate Integration Profile
- Schedule the automatic job

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Purposes of Import Profiles

- Load a file containing multiple records in bulk
- Normalize and validate records
- Match to existing records and control how records are merged or overlaid
- Create new records and/or inventory
- Customize mapping of bibliographic fields into inventory information

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Documentation and Training

- Managing Electronic Resources
 - Portfolio Loader
- Change Electronic Portfolio Information
- Update Selective Packages
- Automatic Upload of Electronic Holdings
- Managing Import Profiles
- Introduction to Alma Import Profiles (Webinar)

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
- Review Q&As
- Register for upcoming sessions
(and see what content they will contain)

Exercises

- Bulk changes to portfolios
- Update selective packages
- Use portfolio loader

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

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