



Managing
Electronic
Resources

ERM-202 Troubleshoot Discovery

April 2025

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

- E-Resource Doesn't Show Up at All
- E-Resource Link is Broken
- E-Resource Requires a Login at Vendor's Site
- Further Resources

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Documentation and Training

- [Managing Electronic Resources](#)
- [Common Causes of Full-Text Linking Problems](#)
- [How to Report Full Text Linking and Availability Problems to Support](#)
- [Summon Linking](#)
- [Alma Listserv](#)
- [Troubleshooting Guide from SUNY](#)

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)

Managing Electronic Resources

Managing Electronic Resources is a course of ten 60-minute sessions regarding many aspects of managing electronic resources in your institution's Alma service.

The course is structured as follows:

- Sessions ERM-101, -102, and -103: A general overview, and basic training in ordering and activating e-resources. Good for library staff who have used Alma before but not for e-resources.
- Sessions ERM-201, -202, -203: Tools for maintaining e-resources, troubleshooting broken links in your discovery service, and conducting overlap analysis. Pre-requisites are Sessions ERM-101, -102, and -103, or experience ordering and activating electronic collections and portfolios.
- Sessions ERM-301 and -302: Advanced tools to track usage statistics, COUNTER data, SUSHI harvesting, and Alma's Analytics tool. Assumes an understanding of all workflows in the ERM-100-level and ERM-200-level sessions (above), as well as familiarity with Alma's Design Analytics tool.
- ERM Bonus 1 and 2: Specialized tools for contributing records to the Community Zone, and uploading holdings for a specific collection: Ebook Central Perpetual, DDA and Subscription Titles. Assumes an understanding of all workflows in the 100-level sessions (above).

Links to register for all sessions in the series:

- [APAC](#)
- [AMERICAS](#)
- [EMEA](#)

Session Number	Session Name	Content Outline	Additional Resources	Registration APAC	Registration EMEA	Registration Americas
ERM-101	Overview and Background	<ul style="list-style-type: none">• Alma's inventory model and terminology for e-resources• Types of electronic portfolios• User roles for managing e-resources	<ul style="list-style-type: none">• Prerequisites: Experience using Alma for physical resources, or already watched Getting to Know Alma and Alma Essentials• Presentation visuals (slides)• Questions and answers from the live trainings session• More documentation and training resources:<ul style="list-style-type: none">• Managing Electronic Resources - documentation home page• Alma LibGuide - Resources tab• Getting to Know Alma (video training)• Alma Essentials (video training)		19 March 2025	View Recording <small>Note: Captions on the recording were created by an automated system and are not entirely accurate.</small>
ERM-102	Order and Activate Collections	<ul style="list-style-type: none">• General ordering and activation workflow• Order subscription collection	<ul style="list-style-type: none">• Prerequisites: Overview and Background (session ERM-101 above)• Presentation visuals (slides)		26 March 2025	View Recording

Exercises

1. Download exercise file for details.
2. Troubleshoot real issues that have been reported about finding resources in your Discovery service!
3. Bring any questions and issues to our next session.



ERM-202: Troubleshoot Discovery Exercises for Attendees

Note: This exercise does not need to be practiced in your sandbox; you can use your production environment. Also: The exercise works equally well in Summon and Primo VE.

Exercise: Troubleshoot Real Discovery Problems

1. Find some patron- and staff-reported discovery problems. Ask [around to your library colleagues, or](#) collect some reports that have been sent from patrons letting you know about discovery issues.
2. Try to determine the cause of the discovery issues, using the workflows you saw during the session, and based on the symptoms of the problem in your discovery service:
 - a. E-resource doesn't show up at all:
 - i. Check for the resource on the vendor site (access provider)
 - ii. Check if the resource exists in the Community Zone (CZ)
 - iii. Check if the resource is activated your Institution Zone (IZ)
 - iv. For serials, check if the coverage (dates for availability and embargoes in your IZ portfolios) include the resource.
 - b. E-resource link is broken
 - i. Check if the resource's collection only has journal-level or title-level linking
 - ii. Check if the resource's parser parameters ([etc](#)) are correct
 - iii. See documentation for other things to check:
 1. [What Are the Common Causes of Full Text Linking Problems, and How Can Linking Be Improved?](#)
 2. [How To Report Full Text Linking and Availability Problems to Support](#)
 - c. E-resource requires a [login](#) at vendor's site
 - i. Check if the resource's service or portfolio has proxy set correctly

Next Week: Overlap Analysis

- Should we purchase a new package from a vendor, or do we already have those e-resources in another package?
- Should we unsubscribe from a package, or will we lose some important titles that we don't have anywhere else?





Thank You!

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

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