ERM Training for Alma

Session 2:

Order and Activate One-time and Continuing Electronic Resources

Individual eBooks & eJournals

March 25, 2019

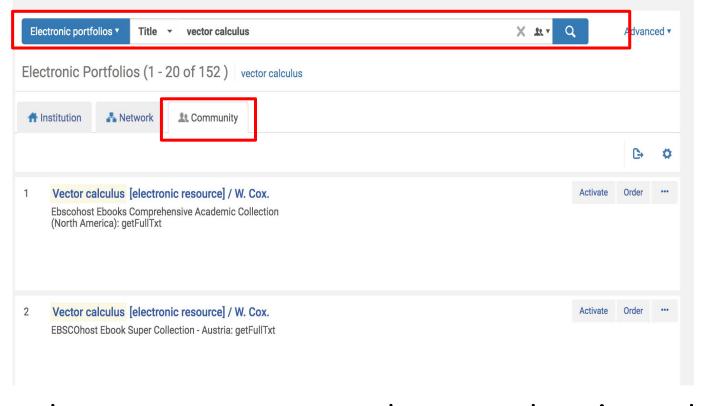
required roles:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended
 - required for delete operations
- Repository Manager
- Purchasing Operator or Purchasing Manager
 - required to create and edit POs & POLs

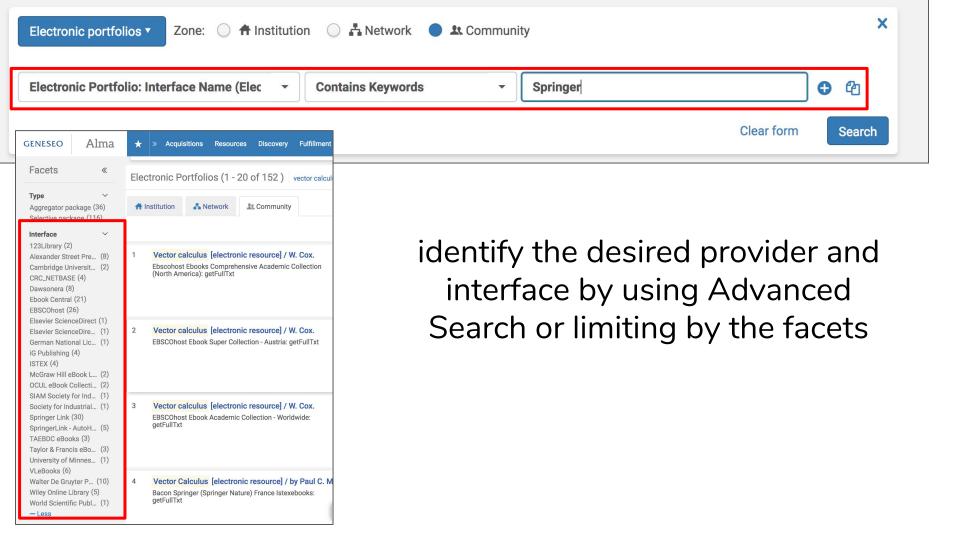
ORDER → ACTIVATE → INVOICE

Electronic resources management starts with an order. Depending on the library and local practices, different staff members and/or different units may be responsible for ordering and activating electronic resources.

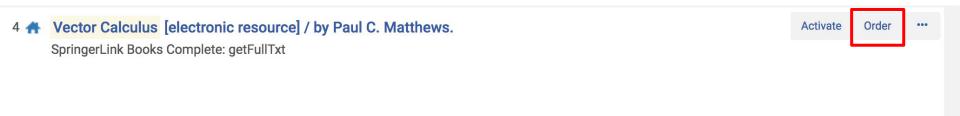
Order & Activate a single eBook



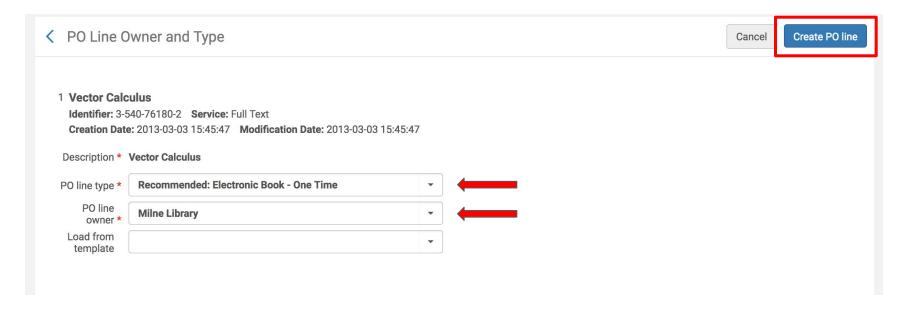
select resource to purchase and activate by searching the CZ for the ebook title using "electronic portfolios"



Click Order for the desired portfolio (the portfolio of the provide and interface from which you are purchasing the ebook, with a Full Text service)



create a Purchase Order Line for the order

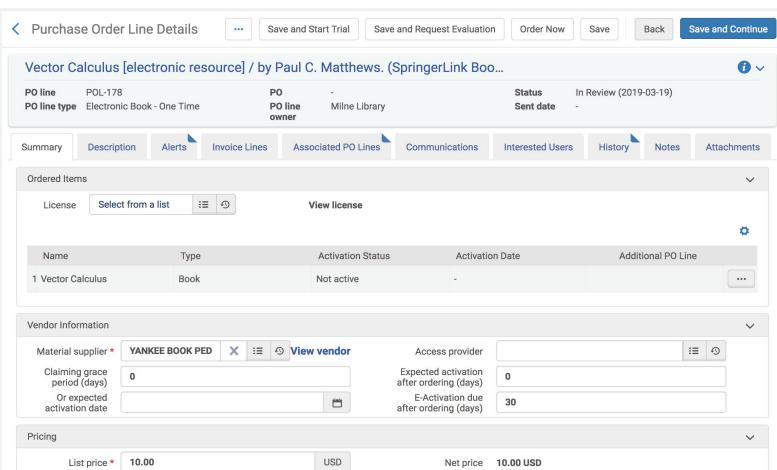


take care in selecting the correct PO Line Type

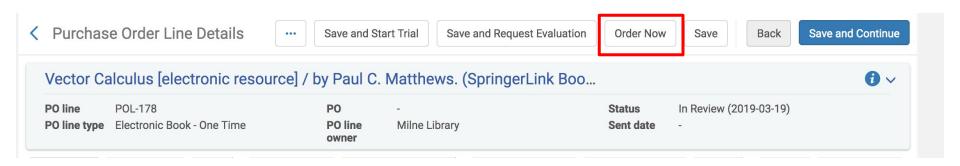
click Create PO Line

enter the required and desired optional information in the POL

required fields: material supplier, list price, quantity for pricing, and fund



when the POL is complete, click Order Now (or Save and Continue, depending on local practices)

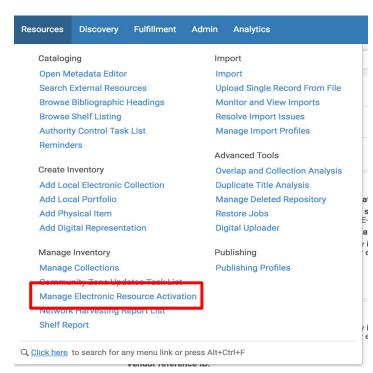


now, it's time to activate!

navigate to the Electronic Resource Activation Task List in one of two ways:

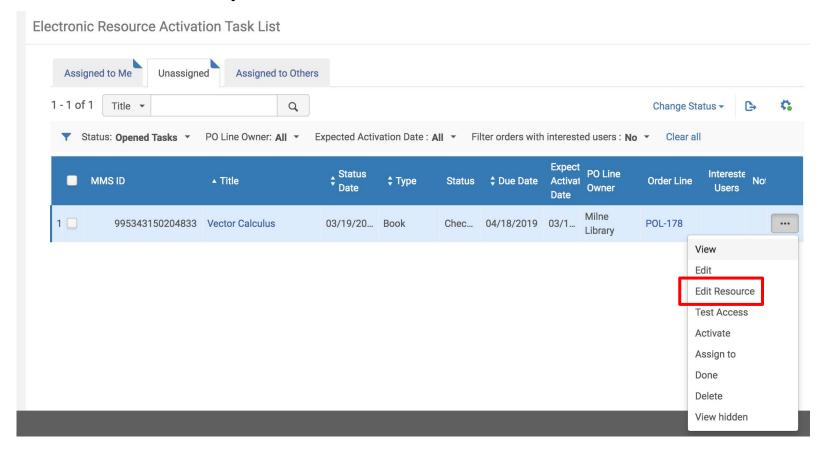


from the Task List

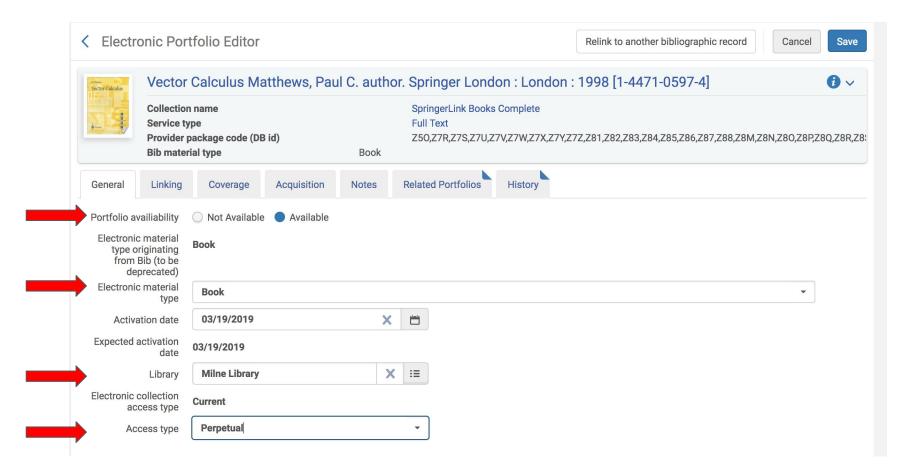


Acquisitions → Manage Inventory → Manage Electronic Resource Activation

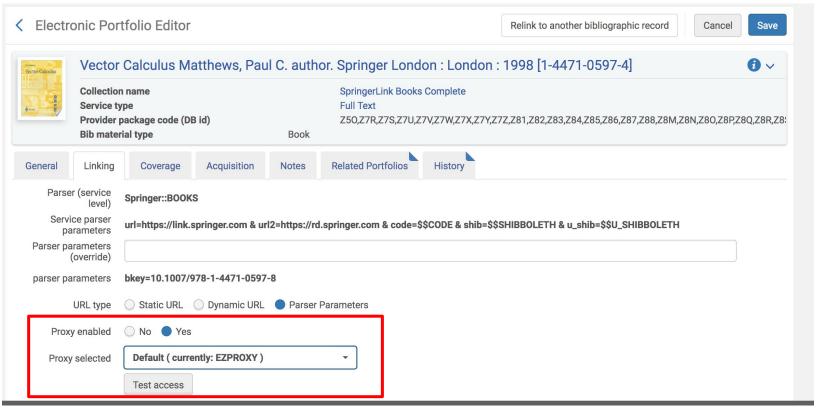
use the ellipses to select Edit Resource



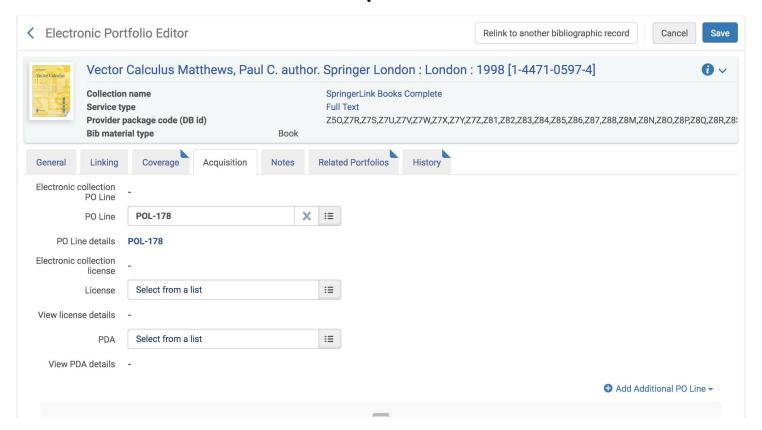
update the General tab of the Electronic Portfolio Editor



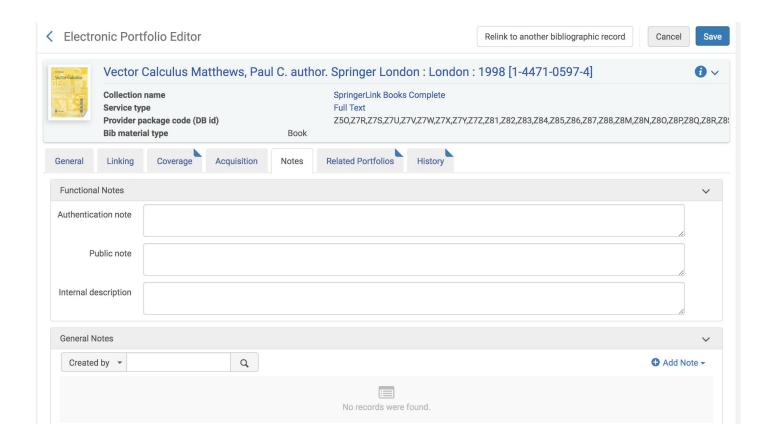
verify the information in the Linking tab and enable the proxy



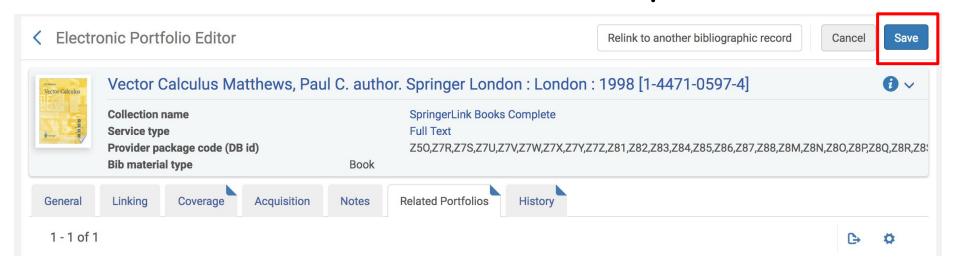
optionally, add a License or additional PO Line in the Acquisition tab



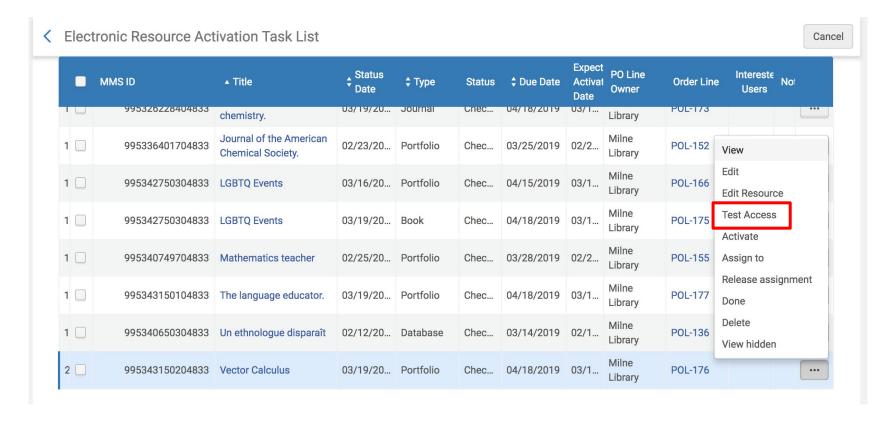
optionally, add a note in the Notes tab Authentication Note & Public Note display to the public



click Save when complete



back in the Electronic Resource Activation Task List, use the ellipses to select Test Access



click the link to Test Access



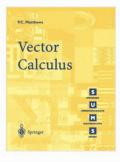
Display in a new window

Source: Vector Calculus [3-540-76180-2] [1-4471-0597-4] Matthews, Paul C. author.

Full text available at: SpringerLink Books Complete







Vector Calculus

Authors (view affiliations)

Paul C. Matthews

Textbook



Part of the <u>Springer Undergraduate Mathematics Series</u> book series (SUMS)

Table of contents (8 chapters)

About this book

Log in to check access

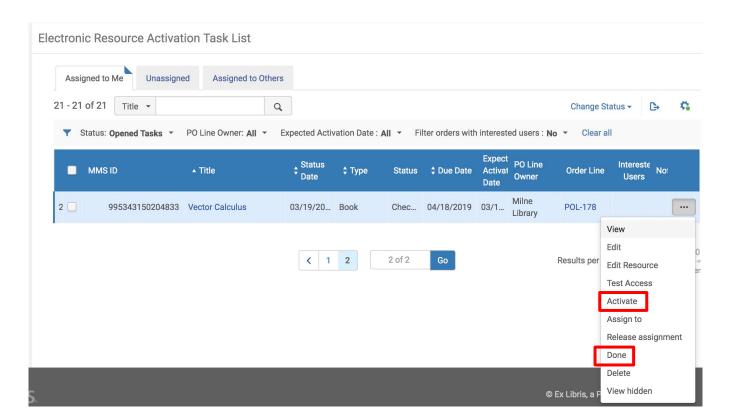
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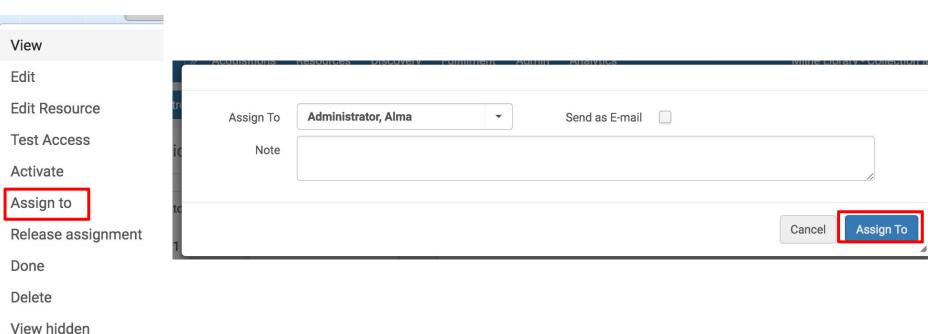
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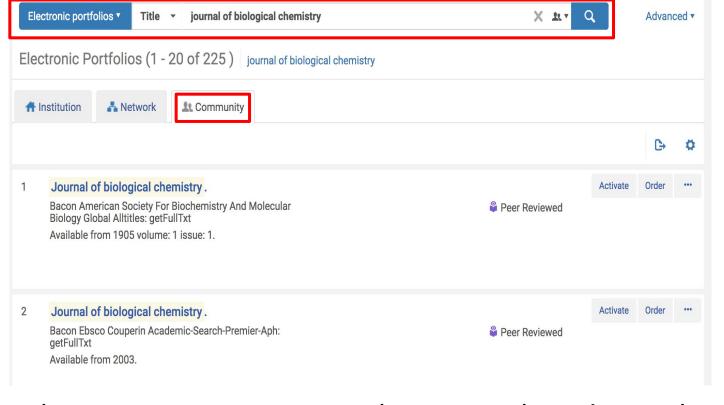
return to the Electronic Resource Activation Task List and use the ellipses to select Activate and then, Done the resource is now activated and will exit the Task List



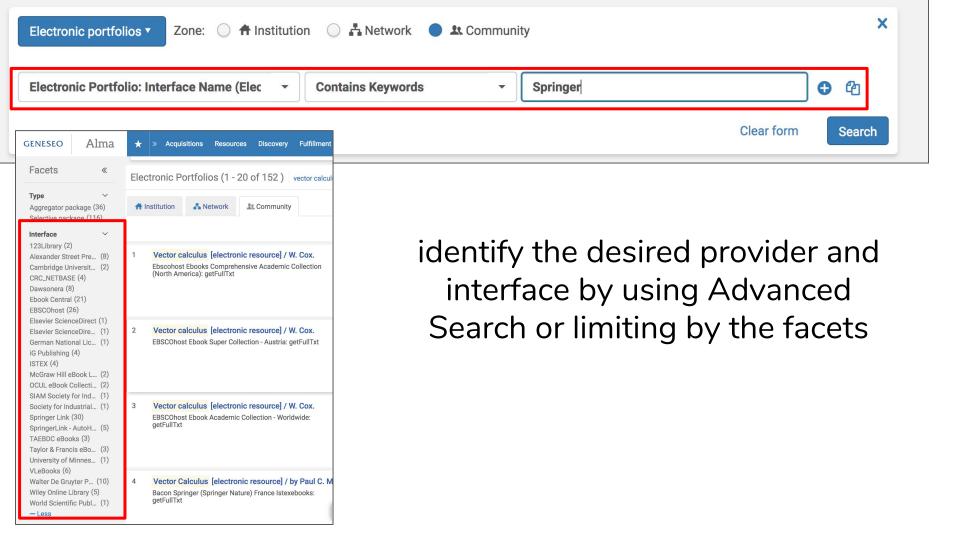
Note: it's also possible to assign an activation to another staff member



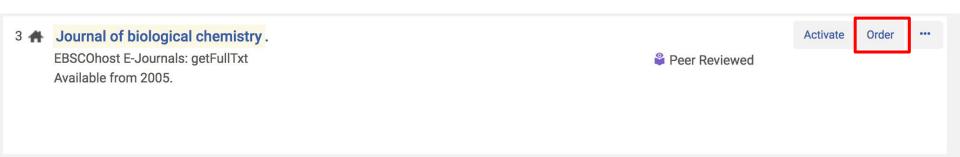
Order & Activate a single eJournal



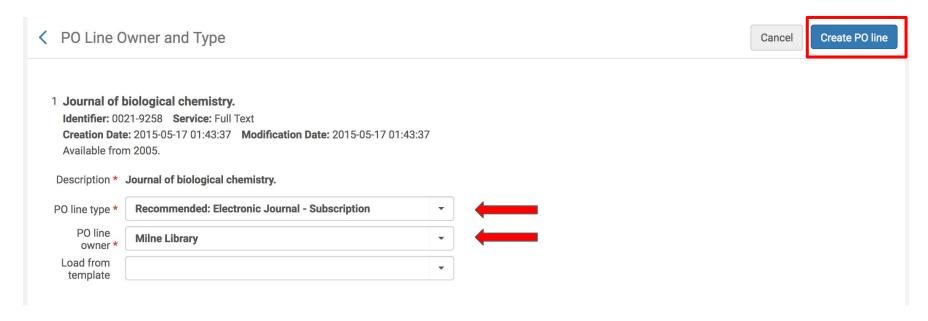
select resource to purchase and activate by searching the CZ for the ejournal title using "electronic portfolio"



Click Order for the desired portfolio (the portfolio of the provide and interface from which you are purchasing the ejournal, with a Full Text service)



create a Purchase Order Line for the order

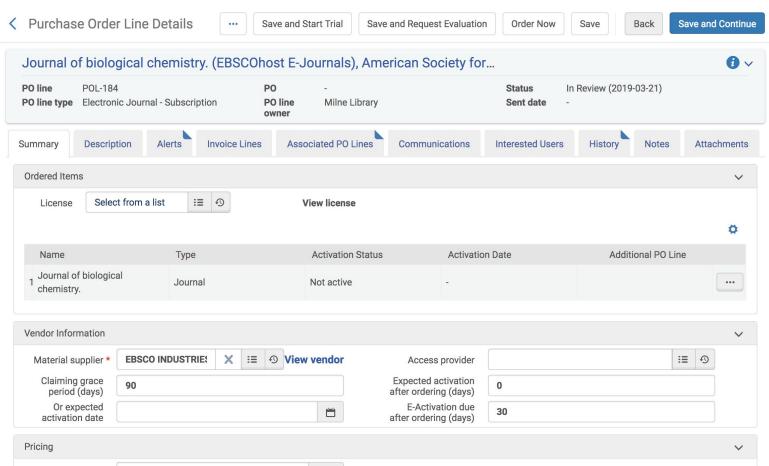


take care in selecting the correct PO Line Type

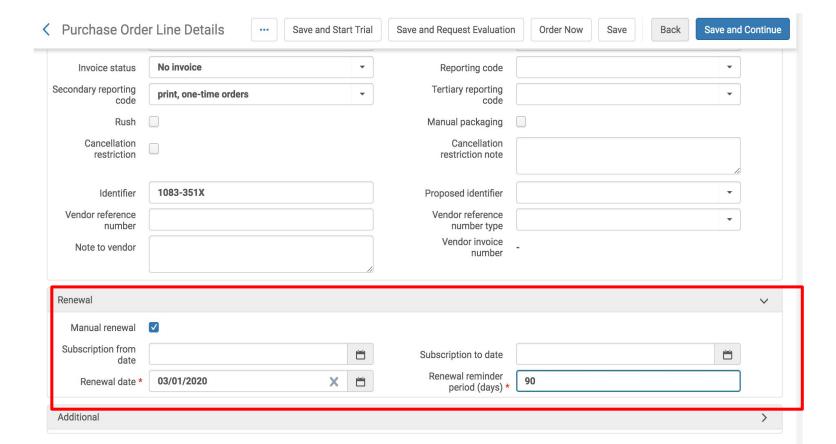
click Create PO Line

enter the required and desired optional information in the POL

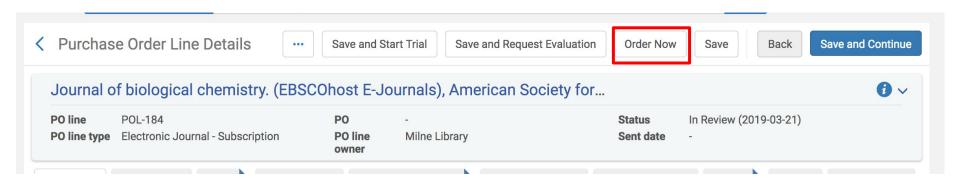
required fields: material supplier, list price, quantity for pricing, and fund



because this POL is for a subscription resource, enter renewal information in the Renewal section



when the POL is complete, click Order Now (or Save and Continue, depending on local practices)

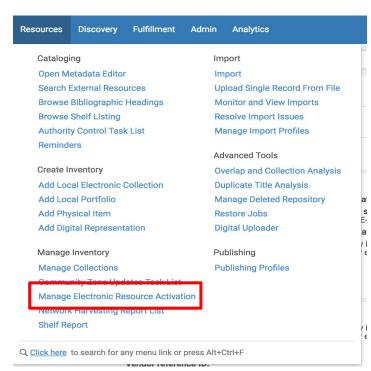


now, it's time to activate!

navigate to the Electronic Resource Activation Task List in one of two ways:

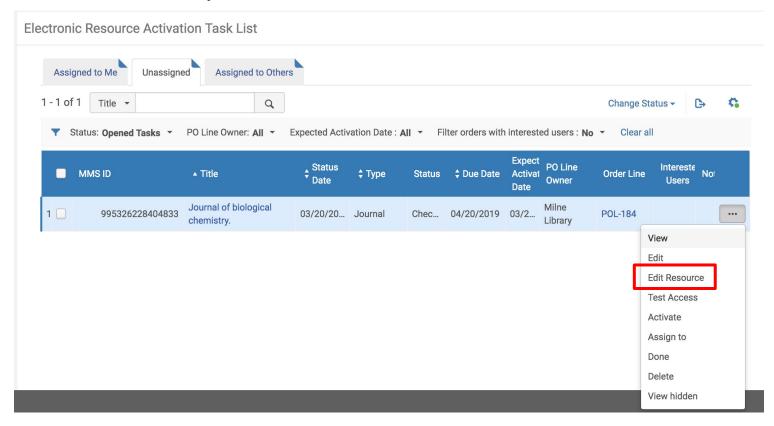


from the Task List

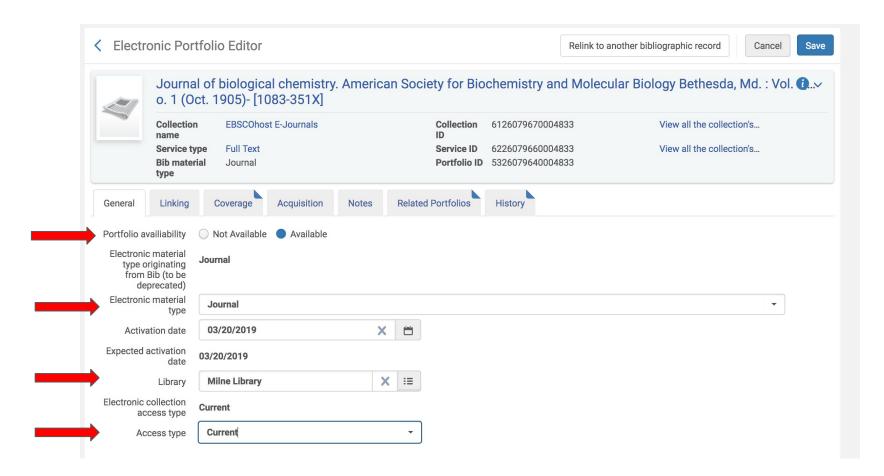


Acquisitions → Manage Inventory → Manage Electronic Resource Activation

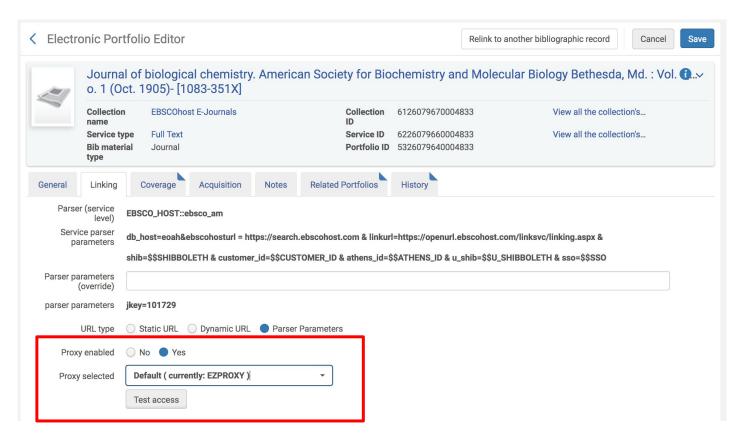
use the ellipses to select Edit Resource



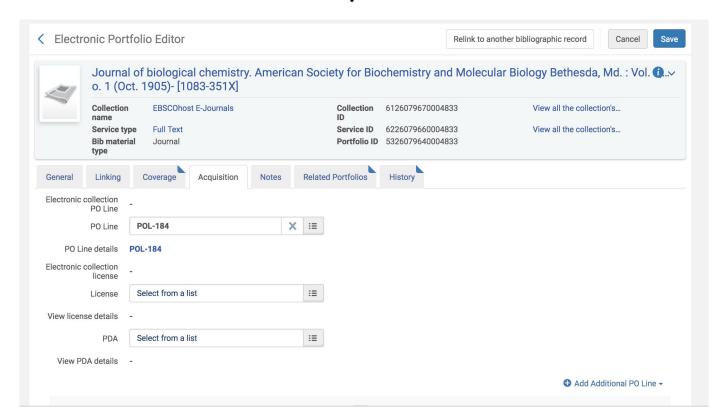
update the General tab of the Electronic Portfolio Editor



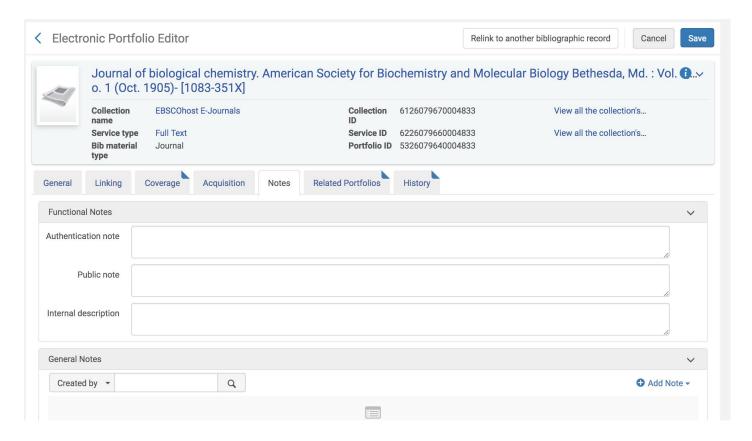
verify the information in the Linking tab and enable the proxy



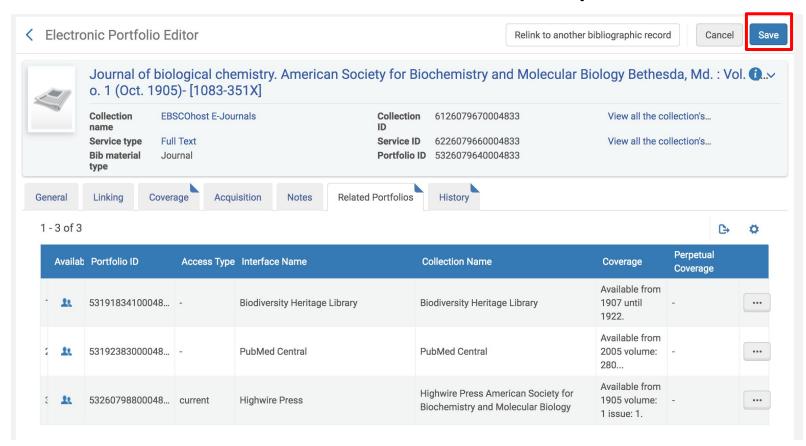
optionally, add a License or additional PO Line in the Acquisition tab



optionally, add a note in the Notes tab Authentication Note & Public Note display to the public



click Save when complete



back in the Electronic Resource Activation Task List, use the ellipses to select Test Access



click the link to Test Access



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Source: Journal of biological chemistry. [0021-9258] [1083-351X]

Full text available at: EBSCOhost E-Journals
Available from 2005.







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Search within this publication

Publication Details For "Journal of Biological Chemistry"

Title: Journal of Biological Chemistry

ISSN: 0021-9258

Publisher Information: American Society for Biochemistry and Molecular Biology

Publication Type: 1

Description: The Journal of Biological Chemistry is owned and published by the American Society of Biochemistry and Molecular Biology, Inc. It is

published weekly in a printed and an electronic version. The JOURNAL publishes papers based on original research that are judged,

after editorial review, to make a substantial contribution to the understanding of any area of biochemistry or molecular biology.

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return to the Electronic Resource Activation Task List and use the ellipses to select Activate and then, Done the resource is now activated and will exit the Task List

•	MMS ID	▲ Title	Status Date	‡ Type	Status		Expect Actival Date	PO Line Owner	Order Line	Intereste Users	Not
1 🗌	995343150304833	Games for health journal.	03/19/20	Portfolio	Chec	04/18/2019	03/1	Milne Library	POL-172		•••
1 🗆	995335088804833	Infant mental health journal.	03/16/20	Portfolio	Chec	04/15/2019	03/1	Milne Library	POL-168		•••
	995335088804833	Infant mental health journal.	03/19/20	Journal	Chec	04/18/2019	03/1	Milne Library	POL-174		•••
1 🗆	995326228404833	Journal of biological chemistry.	03/19/20	Journal	Chec	04/18/2019	03/1	Milne Library	POL-173		•••
1 🔲	995326228404833	Journal of biological chemistry.	03/20/20	Journal	Chec	04/20/2019	03/2	Milne Library	POL-184		•••
1 🗌	995336401704833	Journal of the American Chemical Society.	02/23/20	Portfolio	Chec	03/25/2019	02/2	Milne Library	POL-152	View Edit	
1 🔲	995342750304833	LGBTQ Events	03/16/20	Portfolio	Chec	04/15/2019	03/1	Milne Library	POL-166	Edit Resourc	
1 🗆	995342750304833	LGBTQ Events	03/19/20	Book	Chec	04/18/2019	03/1	Milne Library	POL-17	Activate	
1 🗌	995340749704833	Mathematics teacher	02/25/20	Portfolio	Chec	03/28/2019	02/2	Milne Library	POL-155	Assign to Release assignment	
1 🗌	995343150104833	The language educator.	03/19/20	Portfolio	Chec	04/18/2019	03/1	Milne Library	POL-1	Done Delete	
2 🗌	995340650304833	Un ethnologue disparaît	02/12/20	Database	Chec	03/14/2019	02/1	Milne Library	POL-136	View hidden	

Looking ahead to Thursday....

Electronic collections: organize electronic resources for delivery and publication, and can include electronic journals, portfolios, databases, or ebooks, among others. They can be accessed through a service such as full-text, using bibliographic records and URLs, or by a combination of these.

Portfolio: A portfolio is the specific coverage, services, and link information relevant for a particular electronic title. Portfolios may be defined as standalone entities or as part of an electronic collection. Portfolios have an electronic material type (such as book, journal, database, dissertation, transcript, etc).

Service: describes the access to the collection's portfolios: full text, selected full text, none

Managing Electronic Resources, Ex Libris

 $https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources$

electronic collections come in three varieties

resource types:

Database: collection does not have portfolios; service type is none; no activation required (example: ERIC, AGRICOLA, PsycTests, PsycINFO)

Aggregator Package: library has access to all portfolios in the package; activation required and includes all portfolios (example: CINAHL, Business Source, ProQuest Newsstand, ProQuest Central)

Selective Package: library has access to some, but not all, the portfolios; activation required and selection of portfolios to activate (example: Wiley Full Collection, SpringerLink Books, SAGE Journals)