

Managing Electronic Resources

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

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 automatically for large collections from various providers. Assumes an understanding of all workflows in the 100-level sessions (above).



A recording of each session was created in spring 2025.

Session Number	Session Name	Content Outline	Additional Resources	Recording
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) 	<p>19 March 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated</p>

			<ul style="list-style-type: none"> • 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) 	system and are not entirely accurate.
ERM-102	Order and Activate Collections	<ul style="list-style-type: none"> • General ordering and activation workflow • Order subscription collection from Community Zone • Activate collections 	<ul style="list-style-type: none"> • Prerequisites: Overview and Background (session ERM-101 above) • Presentation visuals (slides) • Exercises • 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 <ul style="list-style-type: none"> ▪ Resources tab ▪ Acquisitions tab ◦ Activating Electronic Resources from the Community Zone 	<p>26 March 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>
ERM-103	Order and Activate Portfolios	<ul style="list-style-type: none"> • General ordering and activating workflow • Order subscription portfolio from Community Zone • Activate single portfolio • View activated resources in discovery service • Create local collection • Create local portfolio 	<ul style="list-style-type: none"> • Prerequisites: Order and Activate Collections (session ERM-102 above) • Presentation visuals (slides) • Exercises • Questions and answers from the live trainings session • More documentation and training resources: 	<p>02 April 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>

			<ul style="list-style-type: none"> ◦ Managing Electronic Resources: <ul style="list-style-type: none"> ▪ Adding a Local Electronic Collection ▪ Adding a Standalone Portfolio ◦ Alma LibGuide <ul style="list-style-type: none"> ▪ Resources tab ▪ Acquisitions tab ◦ Activating Electronic Resources from the Community Zone 	
ERM-201	Maintain E-Resources	<ul style="list-style-type: none"> • Bulk changes to portfolios • Update selective packages • Portfolio Loader • Import Profile • Deactivate or delete resources 	<ul style="list-style-type: none"> • Prerequisites: Order and Activate Portfolios (session ERM-103 above) or strong experience ordering and activating electronic collections and portfolios • Presentation visuals (slides) • Exercises • Questions and answers from the live trainings session • More documentation and training resources: <ul style="list-style-type: none"> ◦ Change Electronic Portfolio Information ◦ Update selective packages ◦ Portfolio Loader ◦ Managing Import Profiles(documentation) ◦ Managing Import Profiles (training) 	<p>09 April 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>
ERM-202	Troubleshoot Discovery	<p>This session will contain a step-by-step process to troubleshoot linking issues in your discovery service, to see how the following sources can cause broken links:</p> <ul style="list-style-type: none"> • Inactive services • Inactive proxy • CDI 	<ul style="list-style-type: none"> • Prerequisites: Maintain E-Resources (session ERM-201 above) • Presentation visuals (slides) • Exercises • Questions and answers from the live trainings session • More documentation and training 	<p>16 April 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>

		<ul style="list-style-type: none"> • Metadata 	<p>resources:</p> <ul style="list-style-type: none"> ◦ Managing Electronic Resources ◦ Alma LibGuide ◦ 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 	
ERM-203	Overlap Analysis	<ul style="list-style-type: none"> • Purpose and use-cases • Compare a CZ collection to all of IZ • Compare an IZ collection to all of IZ • Compare a list of titles to all of IZ 	<ul style="list-style-type: none"> • Prerequisites: Maintain E-Resources (session ERM-201 above) • Presentation visuals (slides) • Exercises • Questions and answers from the live trainings session • More documentation and training resources: <ul style="list-style-type: none"> ◦ Managing Electronic Resources ◦ Alma LibGuide ◦ Enhanced Overlap and Collection Analysis Tool 	<p>23 April 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>
ERM-301	Usage Statistics, COUNTER, and SUSHI Harvesting	<ul style="list-style-type: none"> • Background on Usage Statistics • Upload COUNTER reports • Set Up SUSHI Harvesting 	<ul style="list-style-type: none"> • Prerequisites: All ERM-100-level and ERM-200-level sessions above, or equivalent experience • Presentation visuals (slides) • Exercises • Questions and answers from the live trainings session • More documentation and training resources: <ul style="list-style-type: none"> ◦ Managing COUNTER-Compliant Usage Data in Alma 	<p>30 April 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>

			<ul style="list-style-type: none"> ◦ SUSHI Vendor List ◦ COUNTER Metrics ◦ SUSHI at NISO ◦ Managing Electronic Resources ◦ Alma LibGuide 	
ERM-302	Analytics of E-Resources	<ul style="list-style-type: none"> • Using Alma analytics • Default ERM reports and dashboards • Creating new reports • Overlap of print vs. electronic resources 	<ul style="list-style-type: none"> • Prerequisites: <ul style="list-style-type: none"> ◦ Usage Statistics, COUNTER, and SUSHI Harvesting (session ERM-301 above) ◦ Familiarity with the basics of Alma Design Analytics • Presentation visuals (slides) • Exercises • Questions and answers from the live trainings session • More documentation and training resources: <ul style="list-style-type: none"> ◦ Analytics Documentation ◦ Analytics Training ◦ Alma LibGuide - Analytics ◦ Become an Expert on Alma Analytics (training series) ◦ Cost-per-use articles (Developer Network) 	<p>07 May 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>
A series Quiz (covering the above 8 sessions) and a Certificate of Completion are available on the Library Software Academy .				
ERM Bonus 1	Contribute to the Community Zone	<ul style="list-style-type: none"> • Goals and Responsibilities of Contributing • Edit CZ bib records • Contribute local e-resource portfolios to the CZ • Contribute local e-resource collections to the CZ 	<ul style="list-style-type: none"> • Prerequisites: All ERM-100-level sessions (above) • Presentation visuals (slides) • Questions and answers from the live trainings session • More documentation and training resources: <ul style="list-style-type: none"> ◦ Community Zone Contribution Guidelines ◦ Contributing to the CZ - Bibliographic Records 	<p>14 May 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>

			<ul style="list-style-type: none"> ◦ Contributing to the CZ - Portfolios ◦ Contributing to the CZ - Local Electronic Collections ◦ Contributing to the CZ - Databases 	
ERM Bonus 2	Upload Electronic Holdings Automatically	<ul style="list-style-type: none"> • Overview and workflow • Activate the Collection in CZ/IZ • Create an upload integration profile • Define the purchase model • Record a purchase order line • Test in sandbox • View the job report 	<ul style="list-style-type: none"> • Prerequisites: All ERM-100-level sessions (above) • Presentation visuals (slides) • Questions and answers from the live trainings session • More documentation and training resources: <ul style="list-style-type: none"> ◦ Automatic Upload of Electronic Holdings 	<p>21 May 2025</p> <p>View Recording</p> <p>Note: Captions on the recording were created by an automated system and are not entirely accurate.</p>