

Presentations and Documents - E Resources and CZ

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E Resources and CZ

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2023 Managing Electronic Resources Series (EMEA sessions)

[YouTube Playlist for the 2023 Managing Electronic Resources Series](#)

| Session | Presentation |
|--|---|
| ERM-101 Overview and Background Sept. 19, 2023 | Electronic Resource Management Overview and Background.pptx |
| ERM-102 Order and Activate Collections Sept. 26, 2023 | How to order and activate and invoice an electronic collection from the Community Zone.pptx |
| ERM-103 Order and Activate Portfolios Oct. 24, 2023 | How to create local portfolios and local electronic collections.pptx How to order and activate and invoice an electronic collection from the Community Zone.pptx |
| ERM-201 Maintain E-Resources Oct. 31, 2023 | Bulk Electronic Portfolio Management.pptx |
| ERM-202 Troubleshoot Discovery Nov. 7, 2023 | How to make license information appear in Primo View It (View Online) after clicking Available Online Understanding the meaning and implications of Expand My Results.pptx Understanding the meaning and implications of Linking Level Article and Linking Level Journal.pptx How to use Display Logic Rules to make only certain collections appear in Primo View It (View Online).pptx |
| ERM-203 Overlap Analysis of Electronic Collections Nov. 14, 2023 | Electronic Resource Overlap and Collection Analysis.pptx |

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|--|--|
| ERM-301 - Usage Statistics COUNTER and SUSHI Harvesting | What is COUNTER and what is SUSHI.pptx How to create and test a COUNTER Release 5 SUSHI Account.pptx How to schedule and monitor COUNTER SUSHI harvesting.pptx |
| ERM-302- Analytics of E-Resources | Usage and Cost per use in the E-Inventory subject area.pptx Overlap analysis and physical item usage for weeding (deselection) in Alma Analytics.pptx An Overview of the Alma Link Resolver Usage Subject Area.pptx Documentation on the E-Inventory subject area at Alma Analytics Subject Areas |
| ERM Bonus 1 - Contribute to the Community Zone | Contributing to the Alma Community Zone.pptx |
| ERM Bonus 2 - Upload Electronic Holdings from ProQuest Ebook Central | Upload Electronic Holdings from ProQuest Ebook Central.pptx |

Upload Electronic Holdings PowerPoint Presentations

- [Upload of Electronic Holdings - General Overview.pptx](#)
- [Upload Electronic Holdings from Springer.pptx](#)
- [Upload Electronic Holdings from Elsevier.pptx](#)
- [Upload Electronic Holdings from ProQuest Ebook Central.pptx](#)

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- [Upload Electronic Holdings from Wiley](#)
- [Upload Electronic Holdings from Taylor and Francis](#)
- [Upload Electronic Holdings from Project MUSE](#)
- [Upload Electronic Holdings from JSTOR](#)
- [Upload Electronic Books Holdings from Preselect](#)

General

- [An explanation of the CDI Fulltext Linking types.pptx](#)
- [The Electronic Resource Activation Task List.pptx](#)
- [How to link a local electronic collection \(and local portfolios\) to the Community Zone.pptx](#)

- [What is overridden when linking local portfolios to the Community Zone.pptx](#)
- [How to link a portfolio to a different bibliographic record.pptx](#)
- [How to move portfolios to a different Electronic Collection.pptx](#)
- [How to remove a portfolio from a local electronic collection.docx](#)
- [Support for split coverage in the portfolio loader and portfolio export.pptx](#)
- [Extended Export Example Portfolio with Multiline Coverage.xlsx](#)
- [How to order and activate an electronic resource which is not yet available in the Community Zone - the electronic collection is known.pptx](#)
- [How to order and activate an electronic resource which is not yet available in the Community Zone - the electronic collection is not known.pptx](#)
- [How to activate an electronic collection for a limited time period.pptx](#)
- [Provider Subscriptions PQIS Activation Tool.pptx](#)
- [Activating portfolios of a CZ electronic collection from an Excel file when the portfolios do not have an ISBN or ISSN.pptx](#)
- [Adding Updating or Removing Portfolio Information in Bulk Using an Excel File and the Alma Portfolio Loader.pptx](#)
- [How to update the license of multiple portfolios in batch mode.pptx](#)

- [Linking with Alma](#) - Recording April 12 2021 by Dana Moshkovits
- [Linking with Alma](#) - Accompanying Slides

CDI

- [CDI \(Central Discovery Index\).pptx](#)

Consortia and Group Settings

For the following two presentations see: [Presentations and Documents - Consortia](#)

- How to Manage Electronic Resources in a Network Zone Consortia Using Inventory Network Groups.pptx (updated March 9, 2025)
- Three methods of activating electronic collections in the consortial environment.pptx

CZ

- [Introduction to working with the Alma Community Zone and Electronic Resources.ppt](#)

Discovery Interface Display Logic Rules

- See [Discovery Interface Display Logic Rules Blogs on the Ex Libris Developers Network](#)

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