**California State University – Functional Call Series**

**E-Acquisitions Workflows and Management in the Network Zone**

***Section One – Links to relevant resources (additional links are included in section two)***

***Section Two – Sample Workflows***

***Section One:***

**Alma OLH: E-Resource Workflows:**

<https://knowledge.exlibrisgroup.com/Alma/Product_Materials/Alma_FAQs/E-Resource_Management/E-Resource_Workflows>

**Alma OLH: E-Acquisitions Workflows and Management in Alma Network Zone:**

[https://knowledge.exlibrisgroup.com/@api/deki/files/25225/7\_E-Acquisitions\_Workflows\_and\_Management\_in\_Alma\_Network\_Zone.pptx](https://knowledge.exlibrisgroup.com/%40api/deki/files/25225/7_E-Acquisitions_Workflows_and_Management_in_Alma_Network_Zone.pptx)

<https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Alma_Collaborative_Networks/06_E-Acquisitions_Workflows_and_Management_in_Alma_Network_Zone>

**Alma OLH - Proxy Relationship Table:**

Proxy Relationship table:

https://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/Alma\_Online\_Help\_(English)/Integrations\_with\_External\_Systems/030Resource\_Management/220Resolver\_Proxies

**Alma OLH – Group Settings tab:**

https://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/Alma\_Online\_Help\_(English)/Resource\_Management/050Inventory/020Managing\_Electronic\_Resources#Step%20for%20Editing%20the%20Group%20Settings%20Tab

**Alma OLH - Configuration Inventory Management Groups:**

[https://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/Alma\_Online\_Help\_(English)/Resource\_Management/080Configuring\_Resource\_Management/160Configuring\_Inventory\_Management\_Groups](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_%28English%29/Resource_Management/080Configuring_Resource_Management/160Configuring_Inventory_Management_Groups)

***Section Two:***

**eResource Management Workflow Models**

Model 1 – local acquisition, licensing and management

E-resources are licensed and managed by individual institutions due to their specific needs

Model 2 – centralized acquisition, licensing and e-resources management

E-resources are licensed and managed by consortium center for all institutions or selected institutions

Model 3 – centralized negotiation and management, local acquisition

License terms and fees are negotiated by the central office, purchasing and invoice processing is done by individual institutions

**Sample Workflow for Model 2**

1. Login to Network Alma Sandbox

2. Conduct a Repository search in CZ for an Electronic Collection you wish to purchase and make available for member institutions

3. Click on Order link and create an order

4. e-Activation Task list – Actions>Activate (when workflow is complete, Actions>Done to remove e-resource from e-Activation task list)

5. Repository search for the Collection you just activated

6. Edit Service>Group Settings

7. Resource is available for member institutions added to Group Settings

**Sample Workflow for Model 3 –**

1. Login to Network Alma Sandbox

2. Repository Search in CZ for e-Resource

3. Activate Only

4. Repository search in “IZ” for E Collection

5. Click on Edit

6. Add Negotiated License (license must be created in advance in order)

7. Login to a Member Institution associated with the Negotiated License (For demo we used the Fresno Sandbox)

8. Repository Search in NZ for E Resource Collection associated with Negotiated License

9. Click on Order

10. Price is filled in based on the terms of the Negotiated license

11. Complete the Order and Invoice according to local policies

Adding a Negotiated License:

[http://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/Alma\_Online\_Help\_(English)/Managing\_Multiple\_Institutions\_Using\_a\_Network\_Zone/06\_Acquisitions\_in\_Consortia/01\_Central\_License\_Negotiation](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_%28English%29/Managing_Multiple_Institutions_Using_a_Network_Zone/06_Acquisitions_in_Consortia/01_Central_License_Negotiation)

**Workflow to batch update coverage dates for Portfolios belonging to a Perpetual Collection**

1. Repository search for Electronic Collection

2. Click on Portfolio List link

3. Click on the Portfolio tab

4. Tools>Extended Import to export existing portfolios

5. Modify spreadsheet to reflect desired Coverage dates

6. Click on Load Portfolios button

7. Upload File

8. Select Complete or Incremental>Update portfolios>Next

E-Resources – Using the Alma Portfolio Loader:

[https://knowledge.exlibrisgroup.com/@api/deki/files/42128/E\_Resources\_-\_Using\_the\_Alma\_Portfolio\_Loader.pptx](https://knowledge.exlibrisgroup.com/%40api/deki/files/42128/E_Resources_-_Using_the_Alma_Portfolio_Loader.pptx)

To add, update or delete multiple portfolio using a batch process:

[https://knowledge.exlibrisgroup.com/Alma/Product\_Documentation/Alma\_Online\_Help\_(English)/Resource\_Management/050Inventory/020Managing\_Electronic\_Resources#Adding.2C\_Updating.2C\_or\_Removing\_Portfolio\_Information\_in\_Bulk\_Using\_an\_Excel\_File](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_%28English%29/Resource_Management/050Inventory/020Managing_Electronic_Resources#Adding.2C_Updating.2C_or_Removing_Portfolio_Information_in_Bulk_Using_an_Excel_File)