**Electronic Resource Management**

**Training Material**

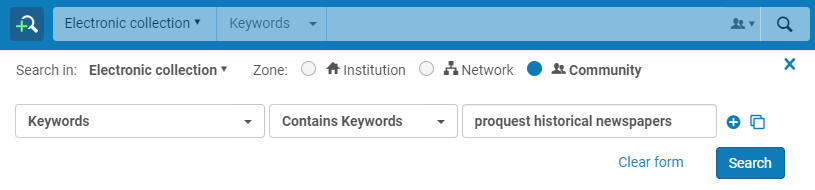
# [Purchasing](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/J_Purchasing" \t "_blank)

# [Managing Electronic Resources](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/K_Managing_Electronic_Resources" \t "_blank)

**Hands-on Exercises**

Login: AlmaUser01 *For these exercises, you may choose to either use the initial prompt to complete the activity on your own, or if you prefer, follow the step-by-step instructions.***Exercise 1: Locate, and order an electronic collection from the Community Zone**

* Execute an **Advanced Electronic collection** search in the **CZ (Community Zone**) for records with the **keywords** proquest historical newspapers



The results are aggregator packages that have a small number of portfolios

* Choose any resource from the list that is not associated with the IZ (Institution Zone) and select **Order** from **the row action menu** (click on the ellipsis if that option does not appear)
* Fill in the PO Line Owner and Type form as follows

**PO line type** = Electronic Collection – Subscription

**PO Line Owner** = Main Library

* Click **Create PO line**
* On the **Summary** tab of the Purchase Order Line Details page, select ProQuest (account code PRO) as the **Material supplier**
* Enter a **List price,** **add a fund** and select a **renewal date**
* Click **Order Now** and click **Confirm**

**Exercise 2: Activate the ordered electronic resource**

* Go to **Resources > Manage Inventory > Manage Electronic Resource Activation > Unassigned** tab
* Locate the resource and click **Activate** in the row action menu
* Review options in the Activation Wizard: Electronic Collection and Services Setup

**Mark Bib as suppressed** = checked

**Electronic Collection Proxy Enabled** = No

**CDI Search activation status** = Yes

**We subscribe to only some titles in this collection** = No (since this is an aggregator package)

**Activate this electronic collection service** = checked

**Make Service available** = checked

**Automatically activate new portfolios** = checked (since this is an aggregator package)

* Click **Next**
* Review options in the Activation Wizard: Linking Information

Enter any parameters that the vendor requires (ProQuest requires a client ID)

Set the service-level proxy as required for resource and select the appropriate proxy

* Click **Next**
* Review options in the Activation Wizard: Select Activation Method

Choose **Activate all** (since this is an aggregator package)

* Click **Next**
* Review the Activation Wizard: Activation Summary and click **Activate**

**Exercise 3:  Export a list of portfolios from the Community Zone that can be used with the Portfolio loader**

* Execute an **Electronic Collection** search in the **CZ (Community Zone)** for resources related to a **keyword** of your choosing



* Limit the results using the facets to limit to Selective package under Type and select a result

For this exercise, choose a small collection if you want the process to go faster.

* Click **Portfolio List** in the row action menu (click the ellipsis if that option is not available on the screen)
* Click the **Export list icon located** at the upper right corner of the results next to the gear icon and select **Extended Export** to download the list to your local computer



Since this is a selective package and this file will be used to activate some of the portfolios in the collection using the portfolio loader, remove some of the lines from the download.

Descriptions for each field on the Excel portfolio loader file can be found here: [The\_Bulk\_Portfolio\_Information\_File](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources/020The_Bulk_Portfolio_Information_File" \t "_blank)    The header format can be used as a template for uploading local portfolios to a local collection in exercise six. One of the identifiers for the portfolio such as ISSN, ISBN must be present.   

**Exercise 4: Activate a collection in the (CZ) Community Zone using the portfolio loader**

* Search the **CZ** for the **electronic collection** from exercise 3
* Click **Activate from the row action menu (**click the ellipsis if that option is not available on the screen)
* Review options in the Activation Wizard: Electronic Collection and Services Setup

**Mark Bib as suppressed** = checked

**Electronic Collection Proxy Enabled** = No

**CDI Search activation status** = Yes

**We subscribe to only some titles in this collection** = Yes (since this is a selective package)

**Activate this electronic collection service** = checked

**Make Service available** = checked

**Automatically activate new portfolios** = unchecked (since this is a selective package)

* Click **Next**
* Review options in the Activation Wizard: Linking Information

Enter any parameters that the vendor requires (some vendors do not have required parameters)

Set the service-level proxy as required for resource and select the appropriate proxy

* Click **Next**
* Review options in the Activation Wizard: Select Activation Method

Choose **Activate electronic collection and selected portfolios via Excel file upload** (since this is a selective package)

* Review options in the Activation Wizard: File Upload
  + **Select catalog** = Institution (if you have a NZ)
  + **File**: navigate to the file you are using
  + **Record Format** = choose appropriate bibliographic format
  + **Validate online**
* Click **Next**
* Review the Activation Wizard: Activation Summary and click **Activate**

**Exercise 5: Review options in an activated electronic collection**

* Search for the electronic collection from exercise four in the Institution Zone and click **Edit Service** from the row action menu (ellipsis)
* Go to the **Portfolios** tab
* The options available in the Electronic Service Editor for activating portfolios in a Community Zone collection are:

**Move Set of Portfolios** move portfolios to a different electronic collection

**Activate/ Deactivate:**

* + - Activate Selected
    - Deactivate Selected
    - Activate All
    - Deactivate All

**Load Portfolios** (use this option if you have a portfolio list prepared in the format supported by the Portfolio Loader)

**Add**

* + - **Add Local Portfolio** (use this option if the collection from Community Zone does not yet include portfolios to which you have access
    - **Add Portfolios from Community:** manually activate portfolios
    - **Add All Portfolios from Community**

**Delete Selected**

* + **To test access to portfolios:** 
    - Select a portfolio in the list
    - Click the row action button (ellipsis) and click **Test access**

**Exercise 6: Create a local electronic collection and attach portfolios to it**

* Go to **Resources > Create Inventory > Add Local Electronic Collection**
* Enter a Public name and any other pertinent details and click **Save and Continue**
* Set the **Service activation status** as **available** on the **Activation** tab  
  Once the local electronic collection is created, there are four ways to attach portfolios to a local electronic collection:
  1. **Load Portfolios to upload a list of portfolios as was done in exercise 3**
  2. **Add > Add Local Portfolio: manual creation of local portfolio**
  3. **Add > Add from Set—this** can be used for adding a set of local portfolios created by the P2E process
  4. **Use an import profile**
     + Search for the collection, click the ellipsis to click **Edit Service**, go to**Portfolios**tab, click**Add > Add from Set**

**Exercise 7: Run a job to update portfolios in bulk**

* Create a set of portfolios (logical or itemized set)
* Click **Admin > Manage Jobs and Sets > Run a Job > Change electronic portfolio information** and click **Next**
* Select the set of portfolios created above
* Change any parameter as you wish and click **Next**
* Review and confirm changes and click **Submit**

**Exercise 8: Link to community for collections, portfolios**

Local portfolios and collections are typically created by the P2E process. For this exercise, find a portfolio that is available in the CZ and not in the IZ and copy the ISSN.

* Go to **Resources > Add Local Portfolio**
* **Create a new title,** enter **Title** and **ISSN**, and set the **Portfolio type** to **Standalone**
* Click **Save and Done**.
* From the portfolio click **Link to community** from the row action menu, select the correct portfolio and click **Next**
* Select source of descriptive information and click **Next**