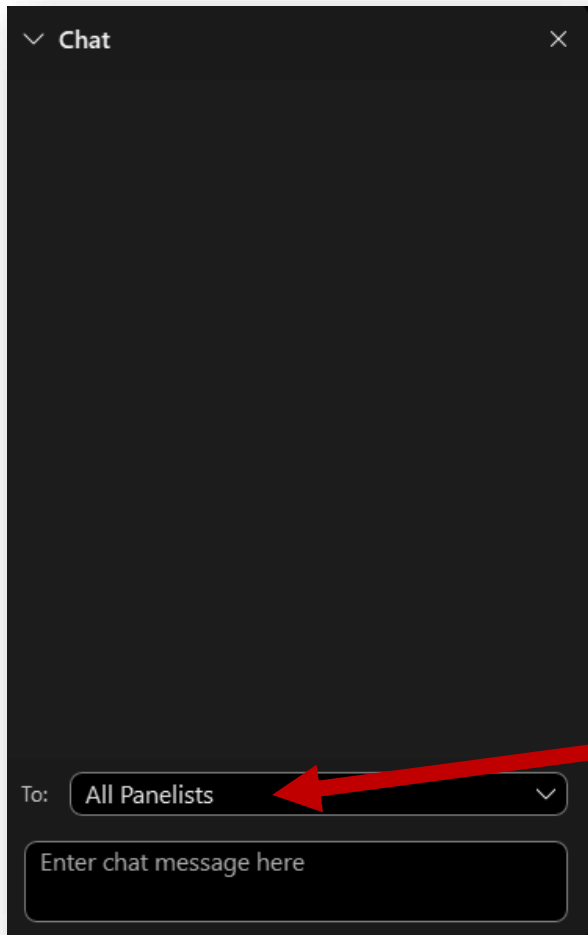




# Implementing Acquisitions in Alma

## Session 3: Activating Electronic Resources and Claiming

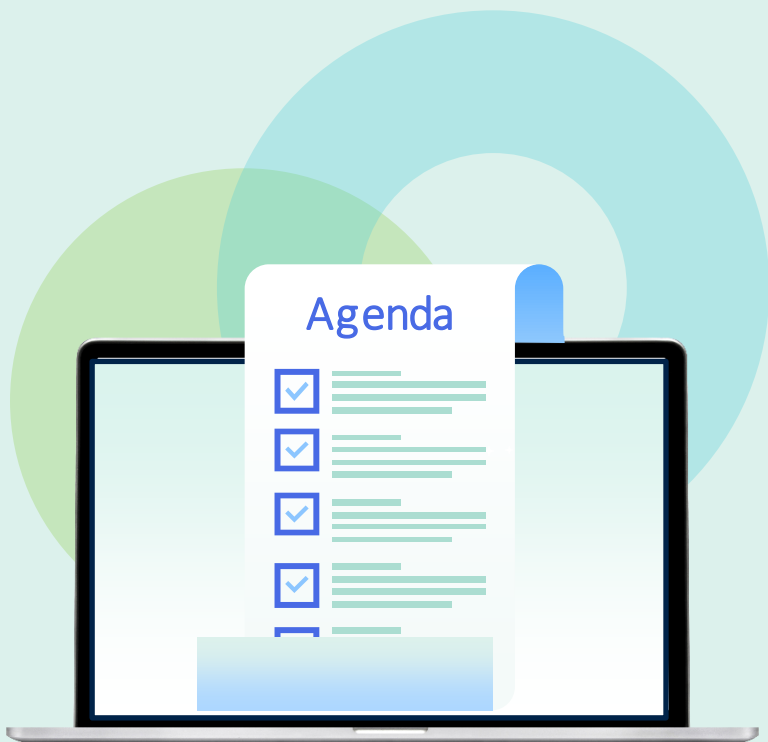


## A few points about WebEx

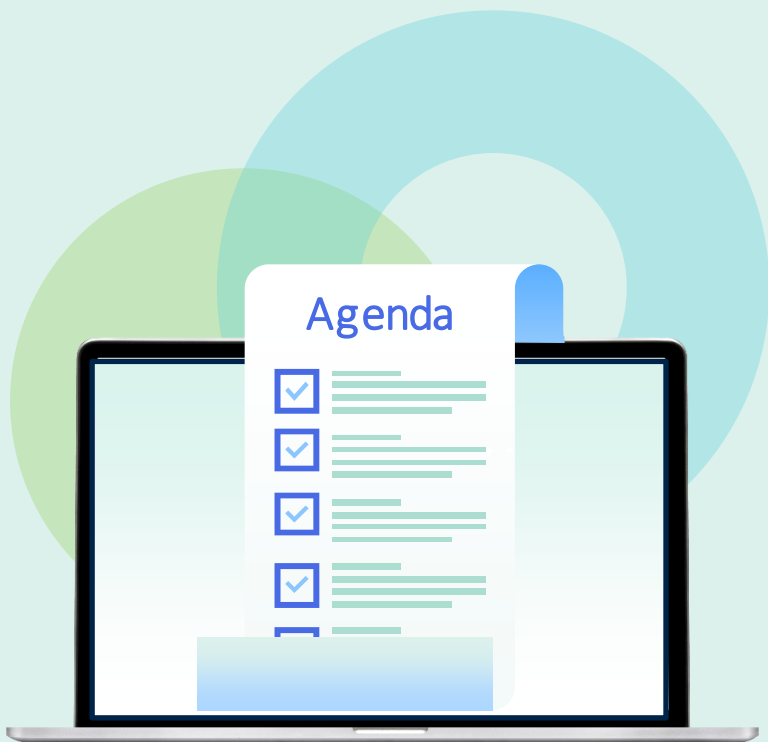
- If you encounter any audio or video issues, exit and rejoin the WebEx session.
- The meeting is being recorded and will be made available to you on the series dashboard.
- Select **All Panelists** in the **To:** **dropdown menu** to submit questions via WebEx Chat.

# Implementing Acquisitions in Alma

	Session Name	Dates
1	Implementing Acquisitions in Alma	April 13
2	Ordering Electronic and Physical Resources	April 20
3	<b>Activating Electronic Resources and Claiming</b>	<b>April 27</b>
4	Receiving Physical Resources and Post-Receiving Processing	May 4
5	Invoicing Resources	May 18
6	Automating the Acquisitions Process	May 25

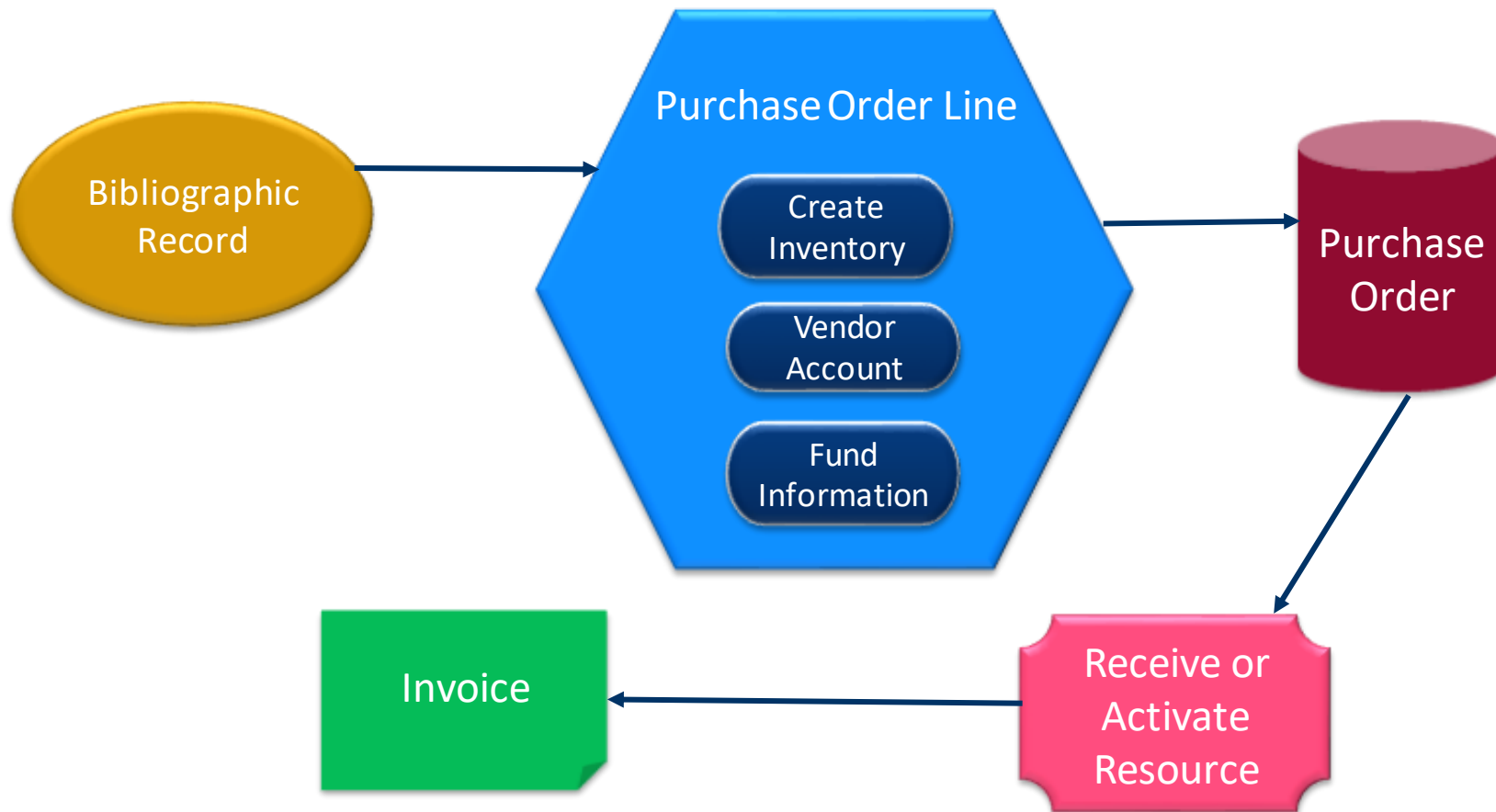


- Workflow and Operator Roles
- E-Resource Activation Tasks
- Activating Electronic Resources
  - Portfolio
  - Collection
- Claims



- **Workflow and Operator Roles**
- E-Resource Activation Tasks
- Activating Electronic Resources
  - Portfolio
  - Collection
- Claims

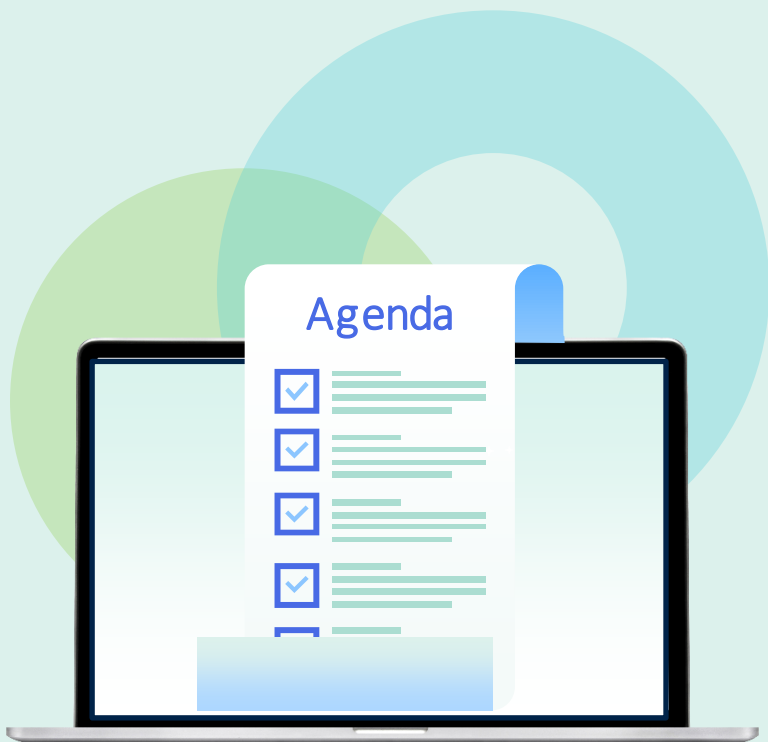
# General Acquisitions Workflow



# Roles related to Activating Electronic Resources

- To activate Electronic Resources, the role of **Electronic Inventory Operator** must be assigned
  - **Electronic Inventory Operator Extended** role adds option to delete electronic inventory
  - **CDI Inventory Operator** adds the option to set the CDI search activation and full text activation with a single action when using the activation wizard





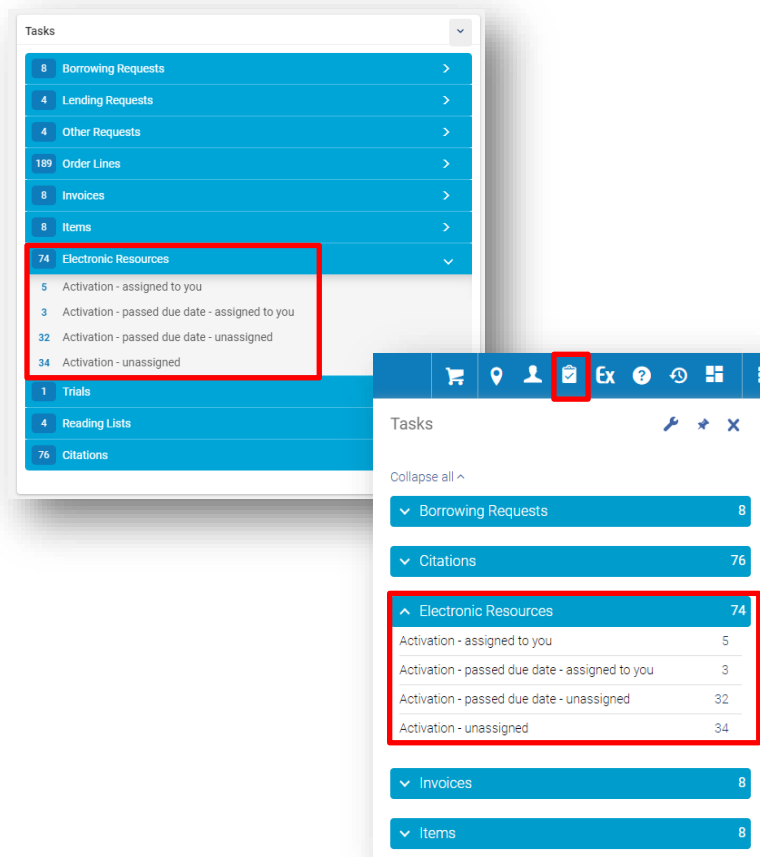
- Workflow and Operator Roles
- **E-Resource Activation Tasks**
- Activating Electronic Resources
  - Portfolio
  - Collection
- Claims



# Activating Electronic Resources

## Activation Task List

- By default, ordering an electronic resource creates an activation task
- Tasks are accessed through the **Tasks widget** or the **Tasks menu** under the Electronic Resources heading
- New tasks are unassigned



# Activating Electronic Resources

**Expected Activation Date** is from the Vendor Information section of the PO line

Expected Activation Date

Vendor Information	
Material supplier	ProQuest Company/PROQUEST/ProQuest Company/PRO
Claiming grace period (days)	0
Or expected activation date	06/25/2021
Reclaim Interval (days)	0
Access provider	
Expected activation after ordering (days)	0
E-Activation due after ordering (days)	30

When the Activation Task is due

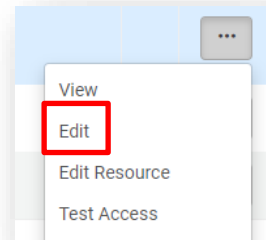
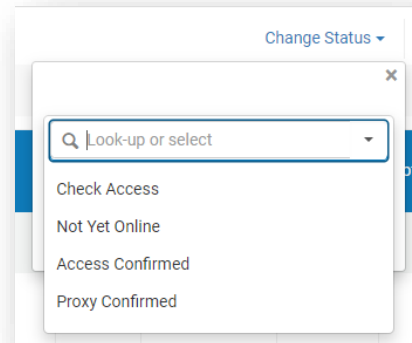
The diagram illustrates the process of activating electronic resources. A box labeled 'Expected Activation Date' has two red arrows pointing to it. One arrow points to the 'Or expected activation date' field in the 'Vendor Information' section, which contains the date '06/25/2021'. The other arrow points to the 'E-Activation due after ordering (days)' field in the 'Access provider' section, which contains the value '30'. A red box highlights this '30' value, and a red arrow points from it to a box labeled 'When the Activation Task is due'.

# Activating Electronic Resources

## Activation Task Status

Do you have a series of steps that your staff completes to ensure that electronic resources are properly activated?

- Activation Tasks can have statuses assigned to track the workflow in Alma
- *Configuration > Resources > General > ETask Statuses*
  - Edit the code table as needed
  - Some customers number the lines
- Choose Edit from the task's row action menu to add attachments and notes to the task



# Activating Electronic Resources

Activation tasks will remain open until they are marked **Done**

<input type="checkbox"/>	Order Line	↕ Title	▼ Type	Status	↕ Status Date	Modified By	↕ Identifier	↕ Due Date	Expected Activation Date	PO Line Owner	Interested Users	Notes
1. <input type="checkbox"/>	POL-8294	The joy of geometry /	Portfolio	Check Access	06/24/2021	System	9781633885868	07/24/2021	06/25/2...	Main Library		...
2. <input type="checkbox"/>	POL-7905	Empire of magic medieval romance and the politics of cultural fantasy /	Portfolio	Check Access	01/17/2018	System	0-231-12526-7	02/16/2018	01/17/2...	Graduate Library		
3. <input type="checkbox"/>	POL-7987	ProQuest PsycARTICLES	Aggregator package	Check Access	10/10/2018	System	-	11/09/2018	10/10/2...	Science Library		
4. <input type="checkbox"/>	POL-8194	Materials Science Database	Selective package	Check Access	06/12/2020	System	-	07/12/2020	06/12/2...	Main Library		

View

Edit

Edit Resource

Test Access

View URL

Assign to

Release assignment

Done

Delete

View hidden



- Workflow and Operator Roles
- E-Resource Activation Tasks
- **Activating Electronic Resources**
  - Portfolio
  - Collection
- Claims

# Activating a portfolio



## What is an Electronic Portfolio?

- Serial or monograph titles that can be standalone entities or be part of an electronic collection
- Electronic portfolios maintain the specific coverage (local or global), services, and link information relevant for a particular electronic title
- Electronic portfolios can be of material types e-journal, e-book, or streaming video, among others

*Think of a portfolio as an item record for an electronic resource*

# Activating a portfolio

1. Select **Activate** from the row action menu on the activation task
2. **Confirm** that you are about to activate the service

	<input type="checkbox"/>	Order Line	↕ Title	▼ Type	Status	↕ Status Date	Modified By	↕ Identifier	↕ Due Date	Expected Activation Date	PO Line Owner	Interested Users	Note:
1	<input type="checkbox"/>	POL-8294	The joy of geometry /	Portfolio	Check Access	06/24/2021	System	9781633885868	07/24/2021	06/25/...	Main Library		...
2	<input type="checkbox"/>	POL-8227	Studies in African literature	Portfolio	Check Access	01/18/2021	System	-	02/17/2021	01/18/...	Graduate Library		View
3	<input type="checkbox"/>	POL-7597	Tinseltown murder, morphine, and madness at the dawn of hollywood /	Portfolio	Check Access	08/18/2020	connie.braun 	0062242229	09/17/2020	08/18/...	Law Library		Edit
4	<input type="checkbox"/>	POL-4524	Chemistry international	Portfolio	Check Access	08/18/2020	connie.braun 	0193-6484	09/17/2020	08/18/...	Main Library		Edit Resource
													Test Access
													<b>Activate</b>
													View URL

# Activating an electronic collection

## What is an Electronic Collection?

- A collection of electronic resources that is either a package of electronic portfolios (i.e. **aggregator package** or **selective package**) or a database (which does not include portfolios or full text service and whose resources cannot be individually managed through an interface)

*This presentation refers to aggregator and selective packages*



# Activating an electronic collection

1. Select **Activate** from the row action menu on the activation task
2. Follow the steps of the Activation Wizard

<input type="checkbox"/>	Order Line	Title	Type	Status	Modified By	Status Date	Identifier	Due Date	Expected Activation Date	PO Line Owner	Interested Users	Not
		Complete eBook-Package 2020	packa...	Access						Library		
7	<input type="checkbox"/>	POL-8301	Earth, Atmospheric & Aquatic Science Collection	Aggre... packa...	Check Access	System	06/25/20...	-	07/25/20...	06/2...	Main Library	...
8	<input type="checkbox"/>	POL-7979	Food as medicine : functional food plants of Africa /	Book	Check Access	System	07/16/20...	1-4987-0609-6	08/15/20...	07/1...	Main Library	
9	<input type="checkbox"/>	POL-8278	The realm of the extra-human agents and audiences /	Book	Check Access	System	04/21/20...	90-279-7749-6	05/21/20...	04/2...	Main Library	
1...	<input type="checkbox"/>	POL-8286	Fungal biology	Book	Check Access	System	05/18/20...	1-4051-3066-0	06/17/20...	05/2...	Main Library	

View

Edit

Edit Resource

Test Access

Activate

Suppress

# Activating an electronic collection

Check the Mark the Bib as suppressed box if you don't want the electronic collection *record* to show in discovery (the portfolios will show in discovery)

Local Electronic Collection Information

Public name (override)

Level URL (override)

Additional descriptive information  
Earth, Atmospheric & Aquatic Science X

Mark Bib as suppressed ☒

Electronic Collection Proxy Enabled  
☒ No ☐ Yes

Electronic Collection Proxy Selected

Proxy will be set at the service level, not the collection level

Leave Do not show as Full Text available in CDI even if active in Alma unchecked as this is a journal package and we want the article-level metadata to display in Discovery

Central Discovery Index information

We subscribe to only some titles in this collection  
☒ No ☐ Yes

Do not show as Full Text available in CDI even if active in Alma  
☐

Since this is an aggregator package set, We subscribe to only some titles in this collection to **No**

Earth, Atmospheric & Aquatic Science Collection

Type  
Aggregator package

Number of portfolios  
1237

Electronic Collection Level URL  
-

Additional descriptive information  
Earth, Atmospheric & Aquatic Science Collection

# Activating an electronic collection

**Some** vendors require linking parameters—fill in as required

Full Text Service - Linking Parameters

Parameter Name	Value
1 CLIENTID	<input type="text"/>

Enable and select the proxy here, at the service level, if needed

Full Text Service - Proxy setup

Proxy enabled ☒ No ☐ Yes

Proxy selected

# Activating an electronic collection

Activate this electronic collection service in Alma

Make the service available in discovery

Automatically activate new portfolios is checked because this is an aggregator package

## Full Text Service

- Activate this electronic collection service ☒
- Make service available ☒
- Automatically activate new portfolios ☒

## Earth, Atmospheric & Aquatic Science Collection

Type

Aggregator package

Number of portfolios  
1237

Electronic Collection Level URL  
-

Additional descriptive information  
Earth, Atmospheric & Aquatic Science Collection

# Activating an electronic collection

Choose Activate all as the activation type since this is an aggregator package

- Activation Type
- ☒ Activate all - Activation of the complete electronic collection with no selection of portfolios
  - ☐ Activate electronic collection and selected portfolios via Excel file upload
  - ☐ Manual activation - activate electronic collection and manually select portfolios

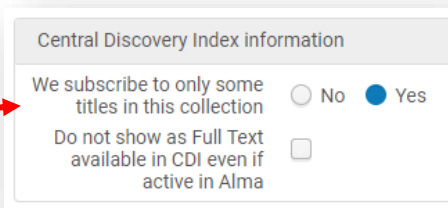
Review the Activation Summary and click **Activate** to kick off the job

Activation Summary	
Services	Full Text
Number of portfolios to be activated	1237
Additional activation count (electronic collection + service)	2

# Activating an electronic collection

When activating an electronic collection that is a **Selective Package** some decisions you make in the Activation Wizard will be different

When activating a selective package set, We subscribe to only some titles in this collection to **Yes**

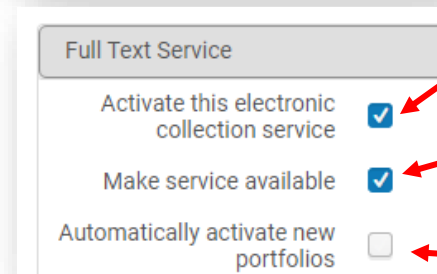


Central Discovery Index information

We subscribe to only some titles in this collection ☐ No ☒ Yes

Do not show as Full Text available in CDI even if active in Alma ☐

Activate this electronic collection service in Alma



Full Text Service

Activate this electronic collection service ☒

Make service available ☒

Automatically activate new portfolios ☐

Make service available in discovery

Do not Automatically activate new portfolios

# Activating an electronic collection

## Activation type options for **Selective Packages**

- Activate electronic collection and selected portfolios via Excel file upload
- Manual activation

Activation Type

☐ Activate all - Activation of the complete electronic collection with no selection of portfolios

☒ Activate electronic collection and selected portfolios via Excel file upload

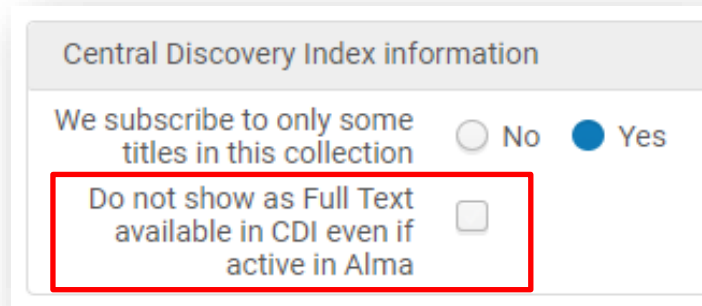
☐ Manual activation - activate electronic collection and manually select portfolios

How many portfolios need to be activated?

Do you have a list of ISBNs/ISSNs that can be put in Excel?

# Activating an electronic collection

## Why use this option?



Central Discovery Index information

We subscribe to only some titles in this collection ☐ No ☒ Yes

**Do not show as Full Text available in CDI even if active in Alma** ☐

- Prevent content from certain collections appearing in Primo results, for example for Open Access collections – where you would like to have the full text active for the link resolver, but you do not want the same full text visible in the filtered search in discovery because it could clutter the result lists for your users.



# Do you see duplicate ebook results in blended search?

- Prevent duplicate ebook results where bibliographic records are published to local Primo local and in the CDI by excluding CDI ebooks.

*Discovery > Search Configuration > Search Profiles*

The screenshot displays the 'Search Profiles' configuration interface. On the left, a table lists search profiles, with the 'MyInst\_and\_CI' profile highlighted. On the right, the 'Search Profile Details' for 'MyInst\_and\_CI' are shown, including the 'Exclude CDI eBooks' checkbox, which is checked and highlighted with a red box.

Code	Display Name	Search type	Description
1. AFN	AFN	Other Index	-
2. CentralIndex	Articles and more	Central Index	All records within your Central Index
3. CourseReserves	Course Reserves	Local Data	All records linked to an active course
4. MyInst_and_CI	Search everything	Blended	Blended - All records belonging to your Central Index profile

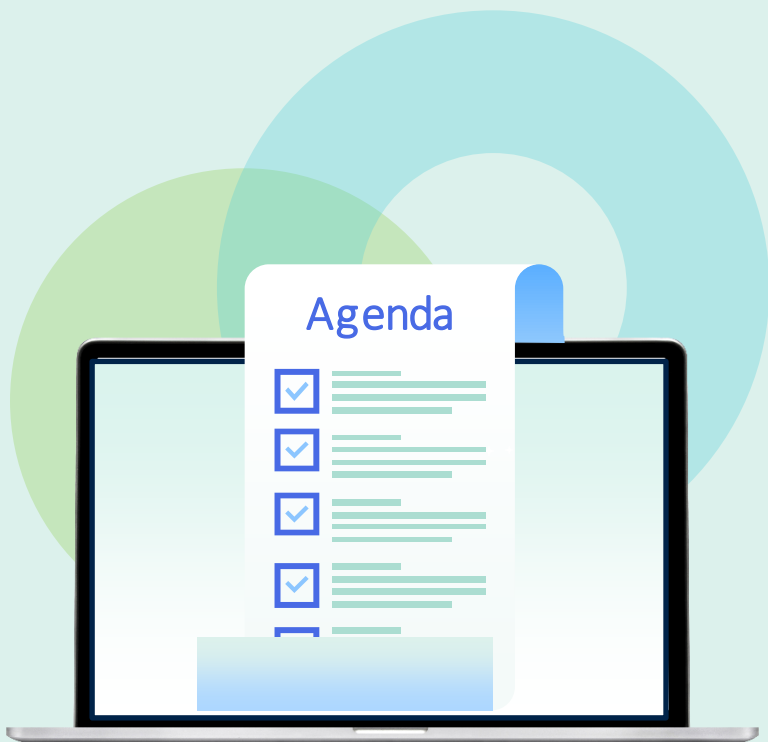
**Search Profile Details**

Code: **MyInst\_and\_CI** Display Name: **Search everything**

Description: **Blended - All records belonging to your institution**

List of Scopes Included in the Search Profile

Code	Name	Description	Filter by Availability	Exclude CDI eBooks	All CDI resource types	All CDI disciplines
CentralIndex	Central Index	All records within your Central Index profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MyInstitution	My Institution	All records belonging to your institution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



- Workflow and Operator Roles
- E-Resource Activation Tasks
- Activating Electronic Resources
  - Portfolio
  - Collection
- **Claims**

# Populating Claim Data

- Delivery and Claim Information fields in the **Vendor Account** record populate the Vendor Information fields on a **PO line**
- Values can be edited on the PO line

Delivery and Claim Information

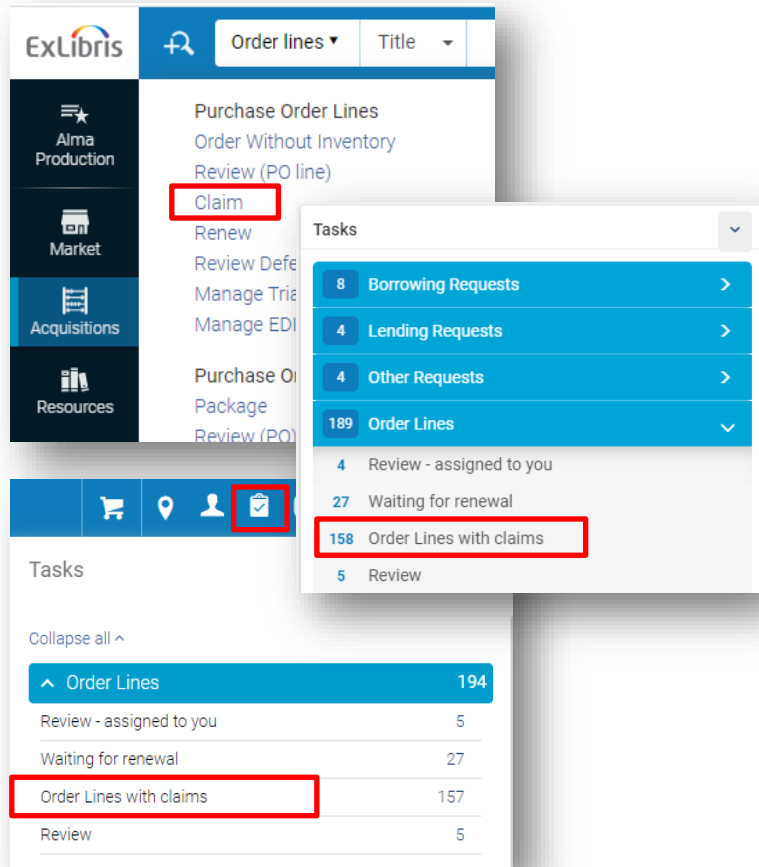
Expected receipt after ordering (days)	60	Claiming grace period (days)	10
Expected invoice interval (days)		Expected activation after ordering (days)	
Renewal evaluation interval (days)		Subscription grace period (days)	7
Reclaim Interval (days)	30		

Vendor Information

Material supplier \* **Book Sense/BKSN/B** [View vendor](#)

Expected receipt after ordering (days)	60	Claiming grace period (days)	10
Reclaim Interval (days)	30	Or expected receipt date	

# Claims

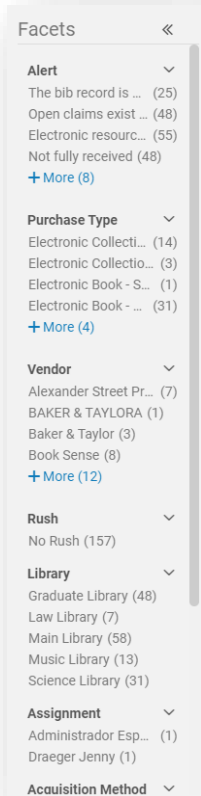


- Claims are created for PO lines when an ordered resource is not received (physical) or activated (electronic) by the expected date
- Overdue PO lines are viewable on the Claim Page *Acquisitions > Purchase Order Lines > Claim*, through the task widget, or the task menu
- Processing claims requires the **Purchasing Manager OR Purchasing Operator** role

# Claims

## Note available facets

- Claims for Print and Electronic PO lines appear in the list
- Electronic purchase types
  - Electronic purchase types with tasks also appear on the **Electronic Activation Task List**
  - When the activation task is marked done the claim will be removed from both lists



# PO Line Claiming Job

- Claims appear on the task lists after the **PO Line – Claiming** job runs (ExL must enable this job in your environment)

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/050Administration/070Managing\\_Jobs/030Scheduled\\_Jobs#PO\\_Line\\_Claiming](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/030Scheduled_Jobs#PO_Line_Claiming)

- Note associated parameters: auto\_claim, auto\_claim\_co, auto\_claim\_electronic

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/020Acquisitions/110Configuring\\_Acquisitions/200Configuring\\_Other\\_Settings#auto\\_claim\\_co](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/110Configuring_Acquisitions/200Configuring_Other_Settings#auto_claim_co)

# Claims

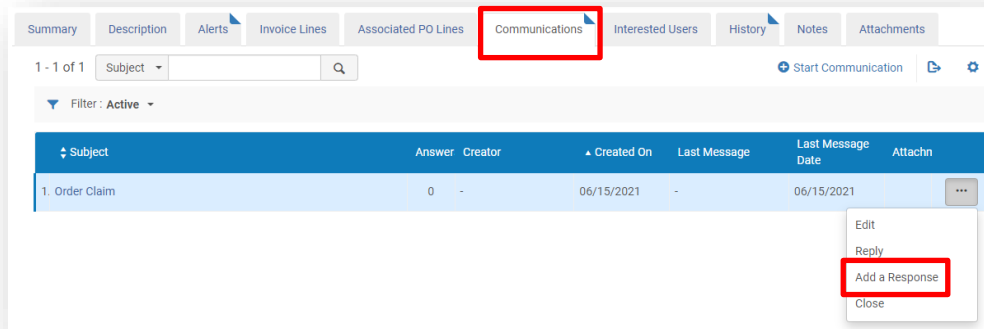
- Alma supports automatic claims processing by default; however, claims can also be generated manually
- Claims can be sent via email or EDI (session 6 of the series will review integration options)
- Processing Claims documentation—*see details on how claims are generated for different PO line types*

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/020Acquisitions/020Purchasing/100Processing\\_Claims](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/100Processing_Claims)

# Processing claims

## Actions that you can take

- **Change Expected Date** in the row actions menu of the claim task
    - Task is removed from the claim task list
  - Add a response that you receive from the vendor
1. Click **Edit** (the PO line) on the claim task
  2. Click on the **Communications** tab
  3. Choose **Add a Response** from the row action menu of the communication to add text







## Resources

# Resources

- Activating Electronic Resources and the Activation Task List

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma Online Help \(English\)/Electronic Resource Management/030 Working with Local Electronic Resources/015Managing Electronic Resources/Activating Electronic Resources and the Activation Task List](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/015Managing_Electronic_Resources/Activating_Electronic_Resources_and_the_Activation_Task_List)

- Managing Electronic Resources Webinar

[https://knowledge.exlibrisgroup.com/Alma/Training/Webinars/Managing Electronic Resources](https://knowledge.exlibrisgroup.com/Alma/Training/Webinars/Managing_Electronic_Resources)

# Resources

<https://knowledge.exlibrisgroup.com>

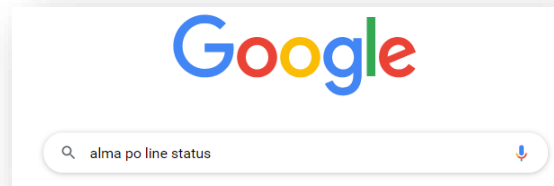
**Knowledge Center**, also called the Customer Knowledge Center or the **CKC**

*Alma > Product Documentation > Alma Online Help > Acquisitions*

<https://exlibris.libguides.com/alma/acquisitions>

Acquisitions LibGuides

All documentation is also indexed in  
Google



# Premium Services - a more individualized approach



Premium Services are one-on-one services to customers that are interested in workflow optimization, individualized training, hands-on configuration, or other individualized assistance with Ex Libris products

[Premium.Services@clarivate.com](mailto:Premium.Services@clarivate.com)

# Next Week: Receiving Physical Resources

- Receiving Physical Resources
  - One-Time Orders
  - Continuous Orders (including prediction patterns)
  - Standing Orders
- Post-receiving Processing





# Thank you!

---

Please fill out the survey that  
will appear when you close the  
WebEx meeting