



# Bulk Electronic Portfolio Management

Exercises for Attendees

Ex Libris Knowledge Days, May 2023

NOTE: Try these exercises in your Alma sandbox before doing them in your Alma production environment, so that any mistakes you make won't affect your patrons using your discovery service.



## Exercise #1: Bulk Changes to Portfolios

1. Ensure you have set your Alma Location to an acquisitions location.
2. Ensure you have a set of portfolios that will be modified (Admin > Manage Sets)
3. Go to Admin menu > **Run a Job**
4. On page Run a Job – Select Job to Run, choose Content type = **Portfolio**
5. Select Job: **Change Electronic portfolio information** and click **Next**
6. On page Run a Job – Select Set, choose Content Type = **Electronic Portfolios**
7. Choose the Set of portfolios you want to modify, and click **Next**
8. On page Run a Job – Enter Task Parameters, choose the parameters you want to change:
  - a. Check the box at the beginning of each row of parameters that will change
  - b. Select any changes you may want.
9. Click **Next**
10. On page Run a Job – Review and Confirm, review the changes you selected.
11. If you don't really want to make the changes, click **Cancel**.
12. If you do want to make the changes, click **Submit**
  - a. Track the progress of the job on the Admin menu > **Monitor Jobs**.

## Exercise #2: Edit Single Portfolio

1. Search your Institution Zone (IZ) for Electronic portfolio > Title = **[a title you know you have]**
2. On the row-action menu of your chosen portfolio, select **Edit Portfolio**
3. On page Electronic Portfolio Editor, select the various tabs (**General, Linking, etc.**) and make any desired changes to any fields.
4. If you want more information about the fields, use the Help menu > **Help for This Page**.
5. If you don't want to make the changes to the portfolio, click **Cancel**.
6. If you do want to make the changes to the portfolio, click **Save**.

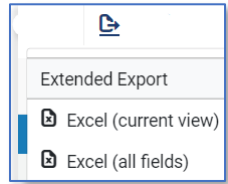
## Exercise #3: Update Selective Package

1. Search your IZ: Electronic Collection > Electronic Collection Name > **[a selective package for which you don't currently subscribe to all portfolios]**
  - a. You can also do an Advanced Search for an Electronic Collection in your IZ where Electronic Collection Type = Selective Package
  - b. Once you get a selective package, do the search for that by name (Step 1 above) so that the next step works.
2. Switch to **Community** tab
3. Click **Portfolio List (xxx)**
4. On page Portfolios List, find a portfolio (title) you will add, and then Select row-action **Activate**.
5. Switch to **Institution** tab
6. On page Electronic Collections, find the collection where you just activated the portfolio, and click **Portfolio List (xxx)** to see the portfolios that are now activated in the selective package.

## Exercise #4: Load Portfolios from a File

1. Before you start this exercise, you need a file that contains portfolios that will be added to a selective package.
  - a. In the Ex Libris Knowledge Center, open the [Managing Electronic Resources](#) page, and scroll down to the Portfolio Loader section.
  - b. You can download the blank Excel spreadsheet there; you can also find information about uploading KBART files
  - c. At a minimum, the file will need titles for the new portfolios; but IDs (like ISSNs/ISBNs) will make for much more accurate mapping.
2. Search your IZ for Electronic Collection > Electronic Collection Name > **[the collection where you'd like to add the portfolios]**
3. On the collection, select row-action menu > **Edit Service**
4. Switch to tab **Portfolios**

5. If you want to download the current portfolios into an Excel file:
  - a. Select Export > **Extended Export**



- b. Open the downloaded Excel File
  - c. Make any changes desired and Save the Excel file, then close it.
6. Select **Load Portfolios**
7. On page Activation Wizard: File Upload, Select the **Excel file you made/modified**.
8. Select Format > **Portfolio Loader Format**
9. Select Loading Policy Type > **Complete**
10. Select Record Format > **[as needed]**
11. Select all three **Actions**
12. For Handling bibliographic records without inventory, select **Delete bibliographic record(s)**
13. Select **Validate online**
  - a. Unless your Excel file is more than 2MB in size, in which case select Validate offline
14. Select **Next** in the upper-right corner
15. If any errors were found during online validation, click Download Excel file to view information and warnings, fix your file, return to the previous page, and proceed with Step 7 above.
16. On page Activation Wizard: Activation Summary, confirm the Summary, and click **Load**.
17. If you're loading just a few portfolios, it will be done in seconds. Switch to **Notes** tab (just to reset the page) and then switch back to **Portfolios** tab to see the new portfolios in this collection.
18. If it is a lot of portfolios, it may take a few minutes; you can monitor the job on the Admin menu > **Monitor Jobs** page. When it's done, you'll be able to see the new portfolios in the collection.

## Exercise #5: Configure Import Profile

1. In Alma, select Acquisitions menu > Import > **Manage Import Profiles**
  - a. If your Alma roles don't allow you to see that tool, try *Resources* menu > **Manage Import Profiles**
2. On page Import Profiles, switch to **Community** tab
3. Select Profile Type > **New Order**
4. Pick an Import Profile you'd like to use, then select row-action **View**
5. On page Import Profile Details, look at the various tabs of information to see if it is a useful import profile. (If not, click **Back** and find another Import Profile.)
6. Click **Copy to Institution**.
7. On page Import Profile Details, go through the various tabs of information (Profile Details, Normalization & Validation, etc.) and make any necessary changes to the Profile.

8. If you want more information about the fields, use the Help menu > **Help for This Page**.
9. Back on tab Profile Details, change Status to **Active**, so this profile can be used in import jobs.
10. Click **Save** in the upper-right corner.
11. On page Import Profiles, find the import profile you worked on, and then row-action **Run**.
12. On page Start New Import, here is where you would load a file to be imported. You don't need to do this step unless you actually have a file of resources that you want to import into Alma.