

Bulk Electronic Portfolio Management

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EX LIBRIS
Knowledge Days

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Part of Clarivate

Welcome and Introduction

Kevin Lane-Cummings

- Senior Customer Education Trainer, Global Education
- Seattle, USA
- SerSol / PQ / ExL / CLVT for 14 years

Beth Campbell

- Alma Tech Support Analyst
- Chicago, USA
- ExL / CLVT for 2 years; 13 years as a cataloger



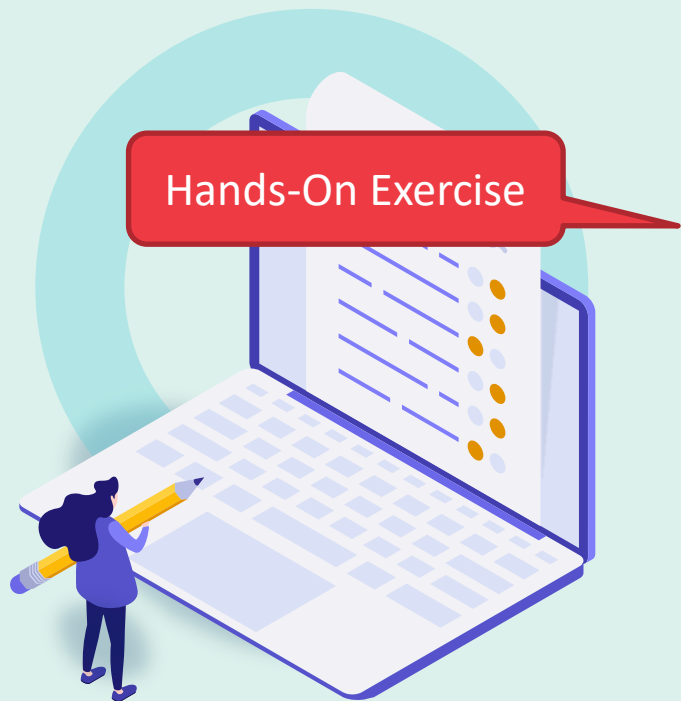
User Roles for E-Resource Management



- Electronic Inventory Operator
- Electronic Inventory Operator - Extended
- Repository Manager
- CDI Inventory Operator

User Roles				
1 - 7 of 7				
	<input type="checkbox"/>	Active	Role Name	Role Area
1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CDI Inventory Operator	Inventory
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Electronic Inventory Operator	Inventory
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Electronic Inventory Operator Extended	Inventory
4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	License Manager	Acquisitions
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Purchasing Manager	Acquisitions
6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Purchasing Operator	Acquisitions
7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Repository Manager	Inventory

Agenda



- Update Selective Packages
- Manage Portfolios on Electronic Services Editor
- Update with “Change Electronic Portfolio Information” Job
- Import Profile
- Manage Split Coverage in Portfolios

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The Electronic Service Editor “Portfolios” tab

- Activate or deactivate all or selected portfolios in an electronic collection
- Delete all or selected portfolios in an electronic collection
- Add portfolios to an electronic collection from CZ or from a set of standalone portfolios
- Move a set of portfolios from one electronic collection to another electronic collection
- Load portfolios from a file



Portfolio Loader

- Excel (xls or xlsx) or KBART file
- Must have:
 - Correct headers
 - and
 - Data on portfolios in each row
- Get sample file from:
 - Ex Libris Knowledge Center
 - or
 - Collection's list of portfolios (if it already has some)



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Changes to All Portfolios in a Set

- Remove local coverage
- Set a proxy
- Update URLs (e.g., remove the proxy prefix)
- Associate portfolios with a license
- Activate/deactivate portfolios
- Delete portfolios
- Apply a library to manage the portfolios



Note: Will not update bibliographic records

Hands-On Exercise

Change the Interface Name on a small set of portfolios.

Sandbox or Production is fine (we'll be restoring portfolios to their original settings afterward)



Exercise Step 1: Create a Set of Portfolios

- Create **Itemized Set**
- Name it something obvious, like **your name**
- Set content type = **Electronic Portfolios**
- To add members: **Advanced Search** in IZ
 - **Electronic Portfolios Is Standalone = Yes**
 - **Interface Name is Empty**
- Pick two or three portfolios, then **Add Selected**
- **Done**



Exercise Step 2: Run the Job

- Admin > **Run a Job**
- Job = **Change Electronic portfolio information**
- Set = **[the set you just created]**
- Set interface name = **[pick one]**
- Condition = **If field empty**
- **Submit**
- **Refresh** until job is done
- Check your work



Exercise Step 3: Re-run the Job to Restore

- Admin > **Run a Job**
- Job = **Change Electronic portfolio information**
- Set = **[the set you just created]**
- Set interface name = **[blank]**
- **Submit**
- **Refresh** until job is done
- Check your work



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Purposes of Import Profiles

Upload into Alma the following records:

- In an EOD file from a vendor, with bib records and ordering information
- Exported from another library system
- And much more!



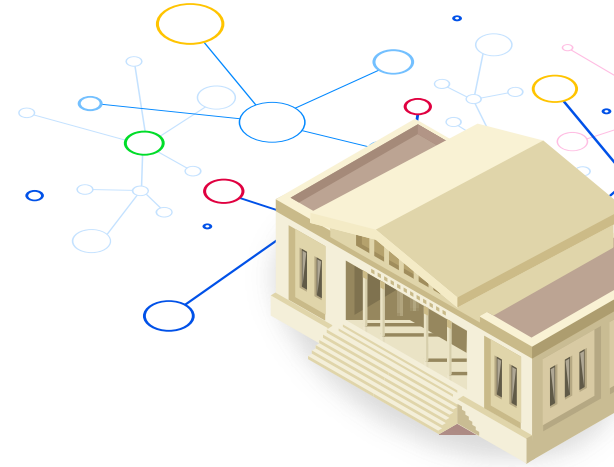
Agenda

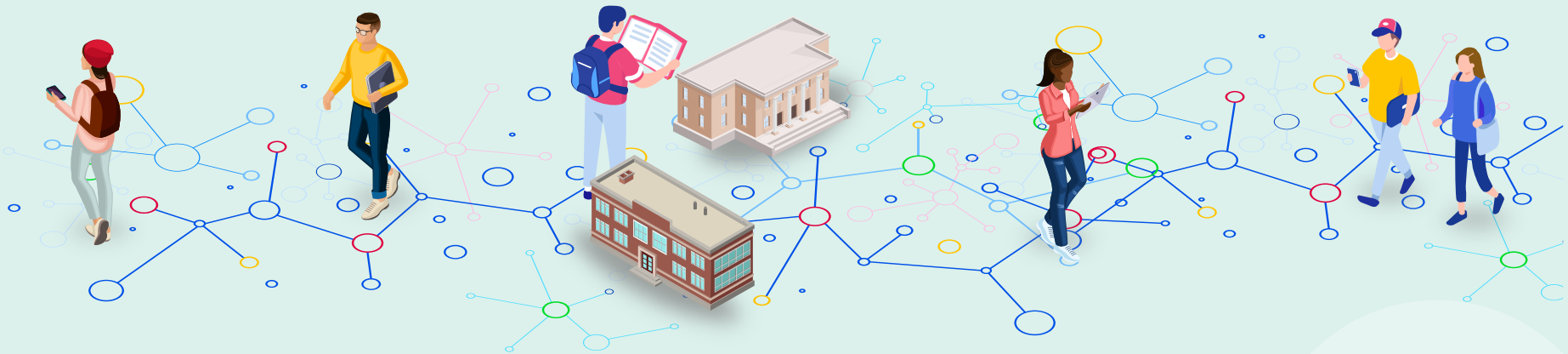


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- **Manage Split Coverage in Portfolios**

Export and Import Portfolios with Split Coverage

- Export via “Extended Report” in electronic service editor
- Export via job “Export Electronic Portfolios”
- Import KBART file via Portfolio Loader in electronic service editor





Question Time

Learn More ...

- [Managing Electronic Resources](#) (documentation)
- [eResource Management Learning Path](#) (training)
- [Managing Electronic Resources](#) (training)
- [Electronic Resources Management Workflow Videos](#)

Exercises

ExL Knowledge Center > 2023 Knowledge Days

“Bulk Electronic Portfolio Management”

1. Bulk Changes to Portfolios
2. Edit Single Portfolio
3. Update Selective Package
4. Load Portfolios from a File
5. Configure Import Profile



**In your Alma
Sandbox
Environment!**

Thank you!



<https://forms.office.com/r/T1AK6Feqmf>

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