



ERM-102: Order and Activate Collections

Exercises for Attendees

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

Exercise #1: Order an electronic collection from the Community Zone

1. Ensure you have set your Alma Location to an acquisitions location.
2. In the persistent search box, search **Electronic Collection** in the CZ for a collection not yet activated in your institution.
3. Click the row action menu [...] to the right and then click **Order**.
4. In the **PO Line Owner and Type** screen:
 - a. **PO Line Type:** Electronic Collection - Subscription
 - b. **PO Line Owner:** choose library handling the ordering process
 - c. **Load from Template:** choose a template if one is created for your purposes.

The screenshot shows the "PO Line Owner and Type" screen in Alma. At the top, there is a back arrow and the title "PO Line Owner and Type". Below this, the collection details are listed: "1 EBSCOhost Ebook Ebsco Eclassics Collection", "Type: Aggregator package", "Service: Full Text", "Creation Date: 01/02/2019", and "Modification Date: 08/27/2023". The "Description" field is populated with "EBSCOhost Ebook Ebsco Eclassics Collection". The "PO line type" field is a search box with the placeholder text "Look-up or select". The "PO line owner" field is a dropdown menu currently showing "Recommended". The "Load from template" section is a table with three rows: "Electronic Collection - One Time", "Electronic Collection - Subscription", and "Other" with a right-pointing arrow.

PO line type *
Look-up or select

PO line owner *
Recommended

Load from template
Electronic Collection - One Time
Electronic Collection - Subscription
Other >

5. On the **Purchase Order** screen:

- a. **PO Line Information:** Select **Acquisition Method**; (**Purchase at Vendor System** if you are purchasing the item through the vendor's interface, or if you're just practicing this in your sandbox)

PO Line Information

CKB ID: 61490000000000301

Sent date: -

Source type: **Manual Entry**

Acquisition method: **Purchase at Vendor System**

Additional PO line reference field: Enter Text Here

Invoice status: **No invoice**

Associated PO lines: Select a value

Material type: **Journal Package**

☐ Manual packaging

☐ Cancellation restriction

b. **Vendor Information:**

- Enter **Material Supplier**, or the vendor that you are paying for the resource.
- Enter **Access Provider**, or the platform on which the content will be accessed, if different from Material Supplier.
- Enter values in **Expected activation days after ordering** or **Expected Activation Date** if your library intends to send a claim to your vendor after the date has passed.

Vendor Information

Material supplier*: Select a value

Access provider: Select a value

Claiming grace period (days): 0

Expected activation: ☒ Days after ordering ☐ Date

Vendor reference number: Enter number

Reclaim interval (days): 0

Enter days

Vendor reference number type: Select a value

Activation due after ordering (days): 30

Vendor invoice number: -

☒ Note to vendor: Enter Text Here

c. **Pricing and Funding:**

- Enter the list price
- Choose the fund(s) being used from the dropdown or search for available funds

d. **License:** attach if relevant

Activation Information

☐ Rush

License: Select a value

e. **Renewal**

- i. Select **Renewal Date** to choose the date by which the material must be renewed with the vendor.
- ii. Select **Renewal Reminder Period** to decide how many days in advance you'd like to be notified of the renewal period.

Renewal Information

Renewal type
Manual renewal

Renewal reminder period (days)
0

Subscription from date
MM/dd/yyyy

Renewal date*
MM/dd/yyyy

Subscription to date
MM/dd/yyyy

Renewal note
Enter Text Here

f. **Reporting Codes:** Select reporting codes from the drop-down menus

Reporting Codes

1st reporting code

2nd reporting code

3rd reporting code

4th reporting code

5th reporting code

6. Click **Order Now** to send the order immediately and create a PO Line. Copy the POL number from the popup message.

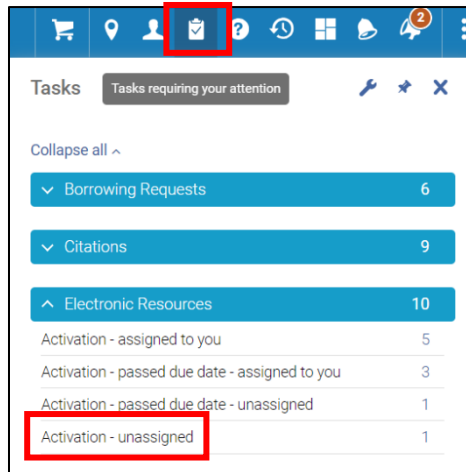
to Me Assign to Cancel Line **Order Now** Save and Start a Trial S

Book Ebsco Eclassics Collection

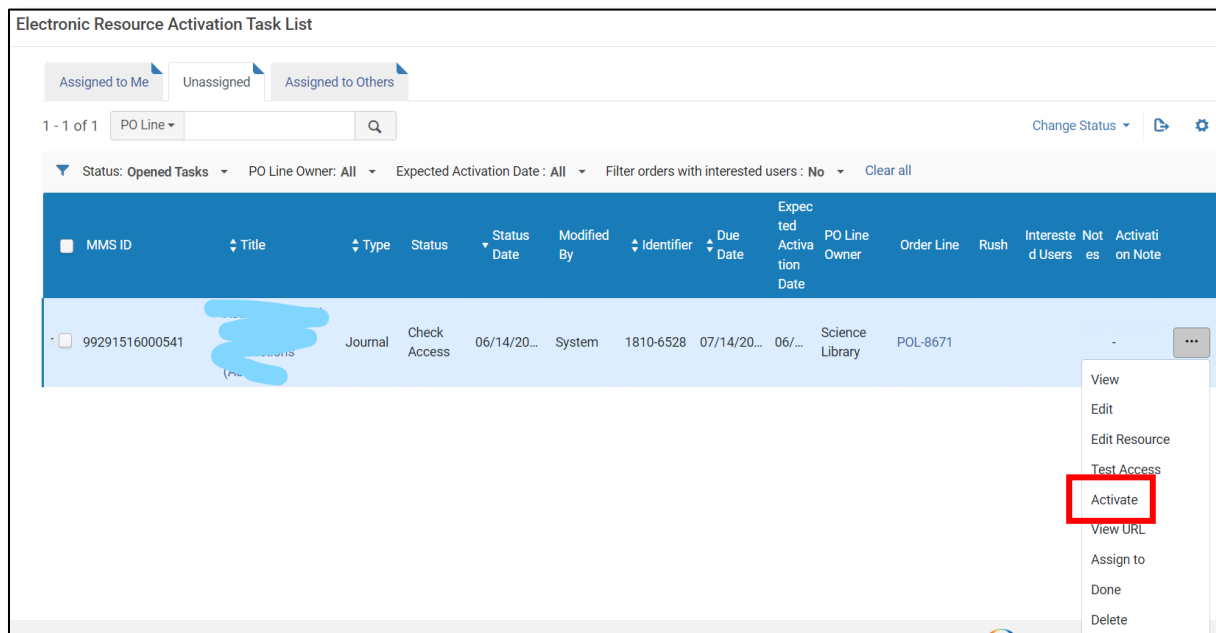
n Library

Exercise #2: Activate an electronic collection from the Community Zone

1. On the **Tasks** menu, click **Activation - unassigned**:



2. In the **Electronic Resource Activation Task List**, click on the ellipses beside your collection and note your options: here you can edit the resource, test access, assign the task, edit the task, or activate. Once access is confirmed, selected **Activate**.



3. In the **Activation Wizard**:
 - a. Select if you'd like to **Mark Bib as suppressed** to suppress collection-level bib discovery and decide if this bib should be proxied if displayed.
 - b. **Central Discovery Index Information**: select if you subscribe to some or all the titles in this collection.
 - c. **Full Text Service**: select to activate the collection service, make it available to users in Primo VE, and to automatically activate new portfolios when appropriate.

- d. Click **Next**.
4. **Linking Information:**
 - e. Where appropriate enter **Linking parameters**; remember that Gale, ProQuest, EBSCO, etc. collections have different parameters to be entered.
 - f. Determine if the portfolios will be proxied and select the appropriate proxy.

Activation Wizard: Linking Information

ProQuest Historical Newspapers: Pennsylvania Collection

Type: Aggregator package
 Number of portfolios: 12
 Electronic Collection Level: -
 URL: ProQuest Historical Newspapers: Pennsylvania Collection
 Additional descriptive information: ProQuest Historical Newspapers: Pennsylvania Collection

Full Text Service - Linking Parameters

Parameter Name	Value
1 CLIENTID	

Full Text Service - Proxy setup

Proxy enabled: ☒ No ☐ Yes

Proxy selected:

Next

5. **Activation Method:** Choose the appropriate activation type for the collection and click **Next**

Activation Wizard: Select Activation Method

ProQuest Historical Newspapers: Pennsylvania Collection

Type: Aggregator package
 Number of portfolios: 12
 Electronic Collection Level: -
 URL: ProQuest Historical Newspapers: Pennsylvania Collection
 Additional descriptive information: ProQuest Historical Newspapers: Pennsylvania Collection

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

Next

6. Review the summary and click **Activate**.
7. Check under **Admin > Manage Jobs and Sets > Monitor Jobs** to view the progress of your activation task.

8. When activation is reviewed confirmed, go back to your task list, and click **Done** under the ellipses to complete your activation task.

Electronic Resource Activation Task List

Assigned to Me | Unassigned | Assigned to Others

1 - 1 of 1 | PO Line: POL-8203 | Search

Status: Opened Tasks | PO Line Owner: All | Expected Activation Date: All | Filter orders with interested users: No | Clear all

MMS ID	Title	Type	Status	Status Date	Modified By	Identifier	Due Date	Expected Activation Date	PO Line Owner	Order Line	Run
1	ProQuest Historical Newspapers: Pennsylvania Collection	Aggre... packa...	Check Access	10/16/2...	System	-	11/15/2...	10/...	Music Library	POL-8203	...

Context menu options: View, Edit, Edit Resource, Test Access, Unsuppress, Assign to, Release assignment, **Done**, Delete, View hidden

Congratulations, you have completed the exercises for this session!