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.

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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)

   b. **Vendor Information:**
      i. Enter **Material Supplier,** or the vendor that you are paying for the resource.
      ii. Enter **Access Provider**, or the platform on which the content will be accessed, if different from Material Supplier.
      iii. 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.

   c. **Pricing and Funding:**
      i. Enter the list price
      ii. Choose the fund(s) being used from the dropdown or search for available funds
   d. **License:** attach if relevant

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.

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

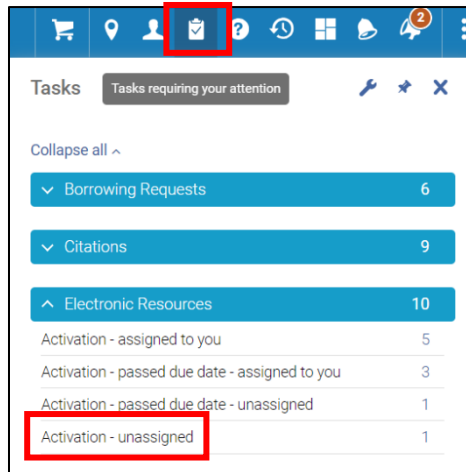6. Click **Order Now** to send the order immediately and create a PO Line. Copy the POL number from the popup message.

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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.**
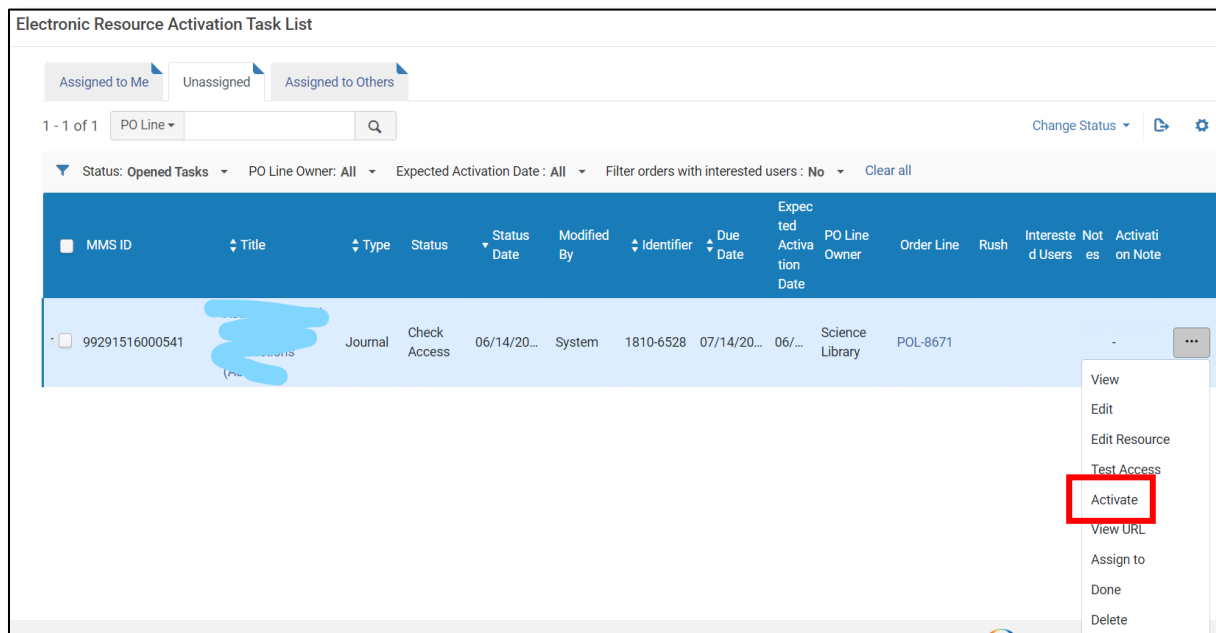
3. In the **Activation Wizard**:
   a. Select if you'd like to **Mark Bib as suppressed** to suppress collection-level bib discovery and decide if this bib should be proxied if displayed.
   b. **Central Discovery Index Information:** select if you subscribe to some or all the titles in this collection.
   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.

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

Congratulations, you have completed the exercises for this session!