



ERM-103: Order and Activate Portfolios

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 One-Time Electronic Portfolio from CZ

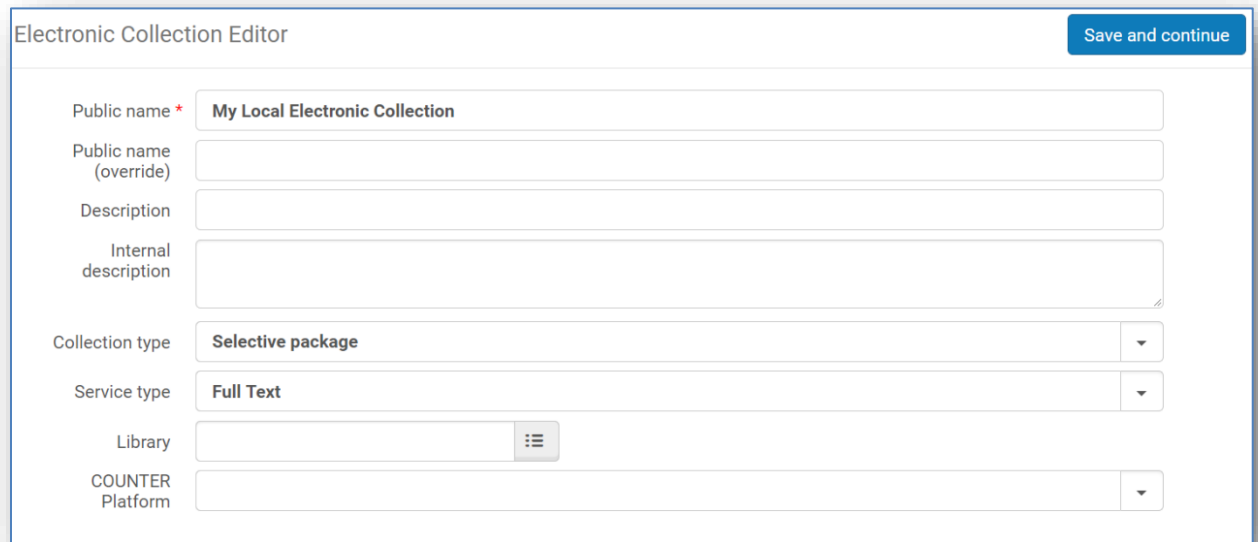
1. Ensure you have set your Alma Location to an acquisitions location.
2. Search CZ for an Electronic Title you don't currently have in your IZ, and specifically an e-book
3. In the search results, on the title you want, click **Portfolio List**.
4. Click Order from the row-action menu of the Portfolio you want (based on the Collection it is part of, or the vendor, or whatever you want).
5. On the **PO Line Owner and Type** screen:
 - a. Set **PO line type** to **Electronic Book - One-Time**
 - b. Set **PO line owner** to your acquisitions library
 - c. Click **Create PO line**
6. On the Purchase Order Line Details screen
 - a. Write down PO Line number
 - b. Optionally, select License
 - c. Select Material Supplier and (optionally) Access Provider
 - d. Add (optional) claiming and activation days
 - e. Enter a **Price**
 - f. Enter one or more **Funds**
 - g. Ensure **Acquisitions method** is **Purchase at Vendor System**
 - h. Add (optional) Reporting Codes
7. Select **Order Now**
8. Click **Confirm**
9. Search your IZ by title to find the resource.

Exercise #2: Activate Electronic Portfolio

1. Start at **Resources > Manage Electronic Resource Activation** and then switch to **Unassigned** tab.
 - a. Or select **Tasks > Electronic Resources > Activation - unassigned**
2. On the **Manage Electronic Resource Activation** page, find the title of the resource you ordered in the previous Example (above), or any resource on this list that hasn't been activated, and select row-action **Activate**. (If Activate is not one of the row-actions, then that resource has been activated!)
3. In the **Confirmation Message** popup, click **Confirm**.
4. In the **Activation Feedback** popup, click **Confirm**.
5. On the **Electronic Portfolio Editor** page:
 - a. On the **General** tab, make any desired changes to the service. (None of the fields is required.)
 - b. On the **Linking** tab, ensure all settings are correct, based on requirements of the access vendor. Be sure to enable and choose a **Proxy** if you want off-campus patrons to be able to access the resource through your proxy.
 - c. On the **Coverage** tab, leave the coverage statement as **Only global**, unless you need to make specific local date changes.
 - d. On the **Acquisition** tab, add any information desired.
6. At the top of the page, click **Save**.
7. Back on the **Manage Electronic Resource Activation** page:
 - a. Find the title you just activated and select row-action Test Access.
 - b. Alma will attempt to access the resource on the vendor site. You may need to select **Display in a new window** to get the resource to show up properly.
 - i. If the resource is displayed properly, skip to Step 9 below.
 - ii. If the resource does not display properly, continue to Step 8.
8. Go **Back** to the **Manage Electronic Resource Activation** page and on the task for the resource, select row-action **Edit Resource**.
 - a. Make changes as needed to try to get access to the resource, such as entering proper URL, Linking parameters, etc.
 - b. Repeat Step 7 above until you see the correct access to the resource.
9. Go to the **Manage Electronic Resource Activation** page and on the task for the resource, select row-action **Done**.

Exercise #3: Create a Local Electronic Collection

1. Start at **Resources > Add Local Electronic Collection**
2. Opens the **Electronic Collection Editor**:
 - a. Enter a **Public Name** exposed to your users in Primo VE
 - b. Enter descriptions when necessary
 - c. Select the **Collection Type**: if the collection has portfolios and a service, will it be a selective or aggregator package? If there will be no portfolios and no service, like an abstracting & indexing database, choose type "Database".



The screenshot shows the 'Electronic Collection Editor' interface. At the top right is a blue button labeled 'Save and continue'. The form contains several fields: 'Public name' with a red asterisk and the value 'My Local Electronic Collection'; 'Public name (override)' which is empty; 'Description' which is empty; 'Internal description' which is empty; 'Collection type' with a dropdown menu showing 'Selective package'; 'Service type' with a dropdown menu showing 'Full Text'; 'Library' with a text input field and a menu icon; and 'COUNTER Platform' with a dropdown menu.

- d. Choose the **Service Type** if you're creating a collection that requires portfolios.
 - e. Choose a **Library** if ownership will be different than the institution level.
 - f. Click **Save and Continue**.
3. **Electronic Service Editor**:
 - a. **Activation tab**: Select the service activation status (available/not available) and any active from/until dates.
 - b. **Service Description tab**: confirm the **Service Type** and enter any descriptions to display internally or externally.

- c. **Linking tab:** determine how the service will give full text access to the portfolios. You will either create parser parameters or the enter the format for a dynamic URL; see the Knowledge Center for more on creating these:

General Linking Information

URL type ☐ Dynamic URL ☒ Parser Parameters

Parser

Parser parameters

URL type (override) ☐ Dynamic URL ☒ Parser Parameters

Parser (override)

Parser parameters (override)

Linking level

Service is free? ☐ Not Free ☐ Free

- d. **Proxy:** determine if proxy will be enabled for the service and choose the proxy where relevant.
- e. **Portfolios tab:** determine how portfolios will be added to the collection: moving them to the collection, loading them with the portfolio loader, adding them.
- f. **Notes tab:** Add any relevant notes.
- g. Click **Save**, and order on this collection, link to community, add portfolios, etc. for whatever needs to be accomplished for your workflow.

Exercise #4: Create a Local Electronic Portfolio

1. Start at **Resources > Add Local Electronic Portfolio**
 - a. Alternatively, you can start from Step 3e above, when creating a new Local Collection. From the Portfolio tab there, select **Add > Add Local Portfolio**.
2. Opens the **New Portfolio** page:
 - a. Choose whether to **Create new title** (with your own bibliographic information) or **Use existing title** (and then in the next field **Choose Title** from a search of your IZ or the CZ).
 - b. Fill out the rest of the descriptive information, as needed
 - c. If this portfolio is not already part of a Local Collection, choose whether it will be **Portfolio type: Standalone**, or **Portfolio type: Part of an electronic collection** (and, if so, choose the **Electronic Collection** to be part of).
 - d. Optionally, select the **Interface Name**, the **Library** responsible for this portfolio, and the **COUNTER Platform**.
 - e. Optionally, enter the **Coverage Information** as needed (specifically for serials).
 - f. Add any **Inventory and Linking Information**, such as the access **URL**, **Proxy** and **Electronic material type**.
 - g. Set the **Availability status** to either **Inactive** (if you don't want it to be discoverable yet in your discovery service) or **Active** (if you want it to be discoverable now).
 - h. Add any **Notes** as desired. **Authentication note** and **Public note** are visible to patrons in your discovery service when the find search results from this resource.
3. Choose what action to do as you save the portfolio:
 - a. **Save and Done** - Returns you to the previous page (Alma home page, or Local Collection list of portfolios, etc.)
 - b. **Save and Test Access** - Opens the Online Services page and tries to access the resource on its URL. If Alma cannot access the resource, then go back and edit the portfolio.
 - c. **Save and Create New** - Opens the New Portfolio page again so you can create another local portfolio.
 - d. **Save and Create Duplicate** - Opens the New Portfolio page again, but with all fields copied from the previous portfolio, except those that are specific to the previous title.

Congratulations, you have completed the exercises for this session!