



# Managing Electronic Collections in Alma

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# Objectives and Audience

By the end of this session, you will understand how to manage electronic resources in Alma:

- Acquire
- Order and activate
- Maintain

This session is for both new and experienced Alma users who are new to managing electronic resources.





# Agenda

**1**

**Introduction**

**2**

**Acquiring E-Resources**

**3**

**Activating E-Resources**

**4**

**Other Options and Maintenance**

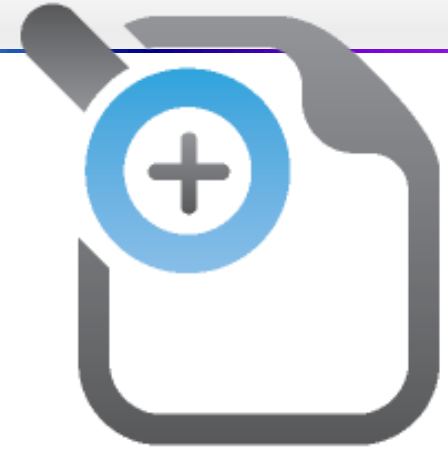
**5**

**Summary, Resources, and Survey**

Necessary user roles to acquire electronic resources...

- A **Purchasing Operator** creates PO Line to order the e-resource
- Upon notification of availability, e-resources are activated by a **Electronic Inventory Operator** or **Repository Manager**
- For electronic resource trials, a **Trial Manager** or **Operator** manages the trial itself
- An **Invoice Operator** finalizes payment details by creating an invoice





**Electronic Collection** includes...

- Aggregator Packages
- Selective Packages
- Databases

**Portfolios:** Serial or monograph titles

- Can be standalone entity or *within* a package

**Service:** Services a package offers in its portfolios (for example, full-text or selected full-text ) and connection/linking information

## Electronic Collection Levels

**Electronic  
Collection**

**ProQuest Biological  
Science Journals**

**Service**

**Full Text**

**Portfolio List**

**1,471 e-journals**

**Portfolio Title**

***Biomedical Journal***

**ISSN 2320-2890**

**Date Coverage: 2013-**



# Navigating the Levels in Alma

The screenshot displays the 'Electronic Collections' page in Alma. At the top, there is a search bar with 'Electronic Collection' selected in the dropdown, 'Keywords' in the 'where' dropdown, and 'gale cengage' in the search input. A 'Go' button and links for 'Advanced search' and 'Saved queries' are also present. Below the search bar, there are tabs for 'Institution' and 'Community'. On the left, a 'Limit results to:' section includes filters for 'Type' (with links for 'Aggregator package (6)' and 'Selective package (3)'), 'Interface' (with a link for 'Galegroup (10)'), and 'Electronic Collection Type' (with links for 'Book Package (1)' and 'Journal Package (8)'). The main results area shows a single result for 'Gale Cengage Health & Wellness Resource Center & Alternative Health Module'. The result details include 'Type: Aggregator package', 'Services: Full Text (Available from: 2014/12/15)', 'Interface Name: Galegroup', 'Creation Date: 2014-12-15 11:43:35', and 'Modification Date: 2014-12-15 14:25:29'. Below the result, there is a row of action links: 'Edit Collection', 'Delete', 'View', 'Portfolio List (51)', 'Additional order', 'Create E-Activation Task', 'Publishing information', and 'Edit Service'. Three orange boxes highlight 'Edit Collection', 'Portfolio List (51)', and 'Edit Service'. Three purple callout boxes with red outlines point to these links from below the screenshot.

Electronic Collections

Find  where  contains   [Advanced search](#) [Saved queries](#)

Limit results to:

Type

[Aggregator package \(6\)](#)  
[Selective package \(3\)](#)

Interface


[Galegroup \(10\)](#)

Electronic Collection Type

[Book Package \(1\)](#)  
[Journal Package \(8\)](#)

Sort by

1 - 1

1  **Gale Cengage Health & Wellness Resource Center & Alternative Health Module**  
Type: Aggregator package Services: Full Text (Available from: 2014/12/15)  
Interface Name: Galegroup  
Creation Date: 2014-12-15 11:43:35 Modification Date: 2014-12-15 14:25:29

[Edit Collection](#) [Delete](#) [View](#) [Portfolio List \(51\)](#) [Additional order](#) [Create E-Activation Task](#) [Publishing information](#) [Edit Service](#)

[Report to Ex Libris](#) [More info](#)

Gale Cengage Nursing and Allied Health Collection

Electronic Collection level

Portfolio level

Service level





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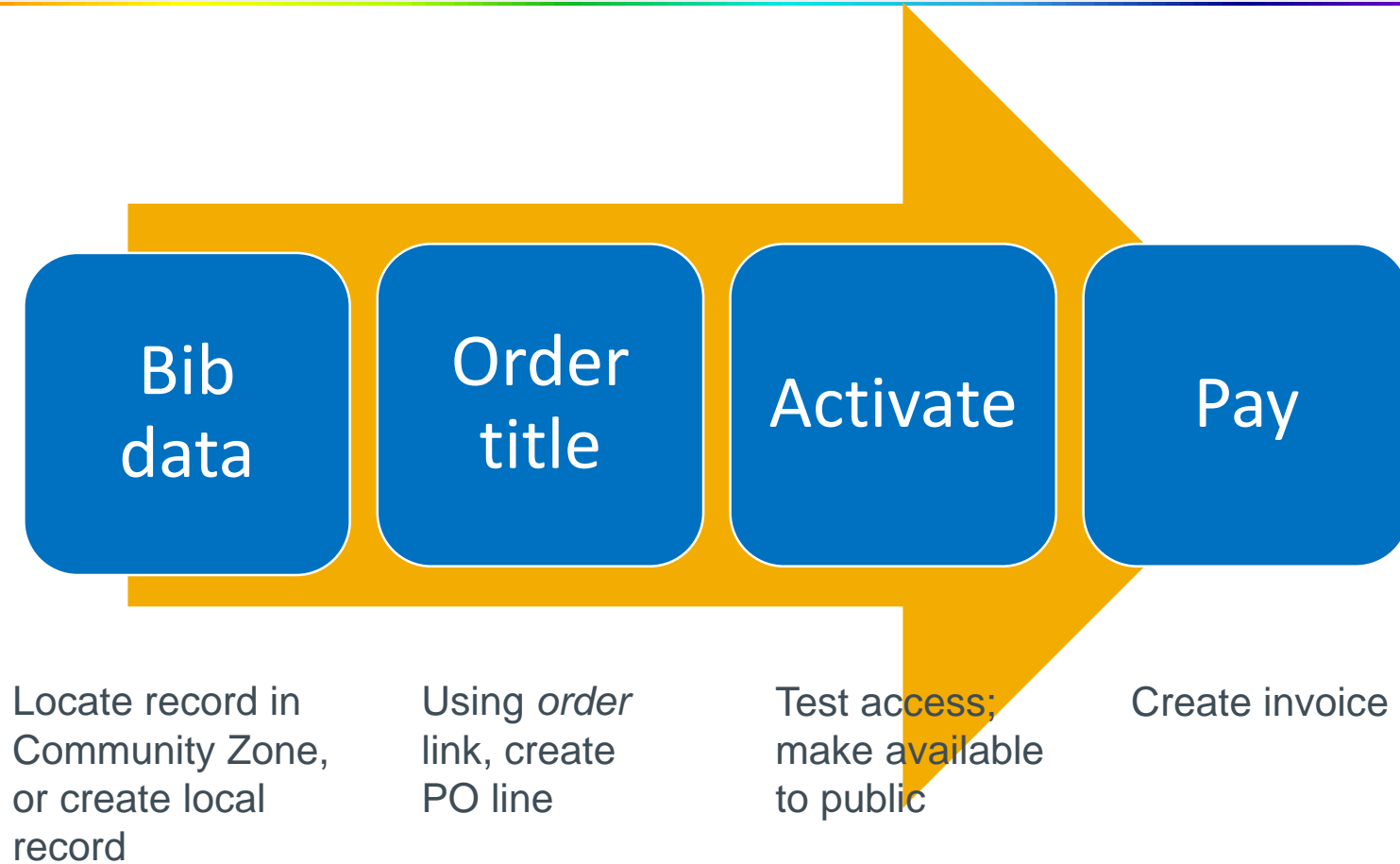
4

**Other Options and Maintenance**

5

**Summary, Resources, and Survey**

# General Workflow



# I. Link to CZ Record and Order Title

- Locate record in Community Zone and link to it for Institution Zone
- Why link to Community Zone record:
  - If Community Zone record is updated, updates can be applied automatically to Institution record
- How to link to CZ record and order title:
  - Repository Search for [Electronic Collection title](#) or [Electronic Portfolio title](#) > click [Community](#) tab to see results in CZ
  - Click [Order](#) link from CZ record to create PO line in Institution



Identify and order an *electronic collection* from Community Zone:

1. From **Repository Search** select **Electronic Collection** in Find drop-down menu and search for a **Electronic Collection Name** = (ex: Proquest)
2. Click **Community** tab.
3. Locate an Electronic Collection with a small number of Portfolios. (<100)



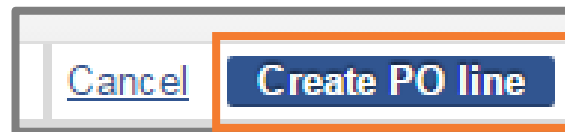
Hands On -Activity

4. Click **Order** link to create PO line

Purchase Type: *Electronic Collection – One time*

PO Line Owner: *Main Library*

Click: *Create PO Line*



Cancel Create PO line

--

Material Supplier: *Your choice*

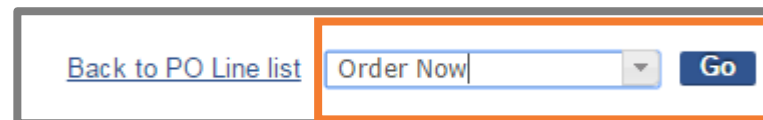
List Price: *\$100.00*

Select and Add Fund: *Your choice*

Acquisition Method: *Purchase at Vendor System*

Reporting Code: *Your choice*

At Go: *Order Now*



Back to PO Line list Order Now Go



Hands On -Activity

5. In your Institution zone, search the Repository for the Collection you just ordered, notice the icon:



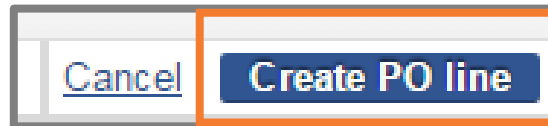
Identify and order a *portfolio* from Community Zone:

1. From **Repository Search** select **Electronic Portfolio** in Find drop-down menu and search for a **Title** contains (ex: Biology)
2. Click **Community** tab to find the Portfolio.
3. Click Order to Create a PO Line

Purchase Type: *Electronic Title – One time*

PO Line Owner: *Main Library*

Click: *Create PO Line*



Hands On -Activity

4. When the PO Line Form Opens- complete as follows:

Material Supplier: *Your choice*

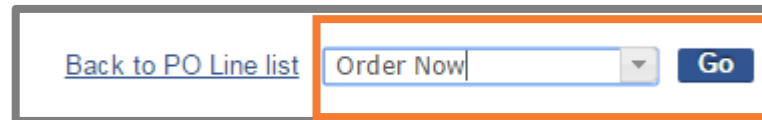
List Price: *\$30.00*

Select and Add Fund: *Your choice*

Acquisition Method: *Purchase at Vendor System*

Reporting Code: *Your choice*

At Go: *Order Now*

A screenshot of a web form interface. On the left, there is a link labeled "Back to PO Line list". To its right is a dropdown menu with "Order Now" selected. Further right is a blue button labeled "Go". The entire form area is enclosed in a thin grey border, and the dropdown menu is highlighted with a thick orange border.

5. Go back to Repository Search; search for electronic portfolio in Institution – notice icon.



Hands On -Activity



## II. Create Local Collection and Order Title

*Local* electronic collections can be:

- Selective packages
- Aggregator packages
- Databases



Why create a local collection:

- Electronic resource doesn't exist in Community Zone

How to create and order a local collection:

- Resource Management > Create Inventory > [Add Local Electronic Collection](#)
- Once record is created, click [Order](#) link

# Add Bib Record or URL to Electronic Collection

In addition to portfolios, electronic collection can also include:

- Bibliographic record describing electronic collection
- URL to native interface of the electronic collection

Electronic Collection name SpringerLink Books Biomedical and Life Sciences

Electronic Collection Description General Information **Additional Information** Notes History

Electronic Collection Information

Source Source ID

Creator

Alternative Title

Electronic Collection Level URL

Electronic Collection is ☒ Not Free ☐ Free free?

Electronic Collection Proxy ☒ No ☐ Yes Enable

Language

Electronic Collection Proxy Selected

Category

Additional descriptive information

Number of portfolios 10284

Character set iso-8859-1



# Create a Local Electronic Collection Record (demo)

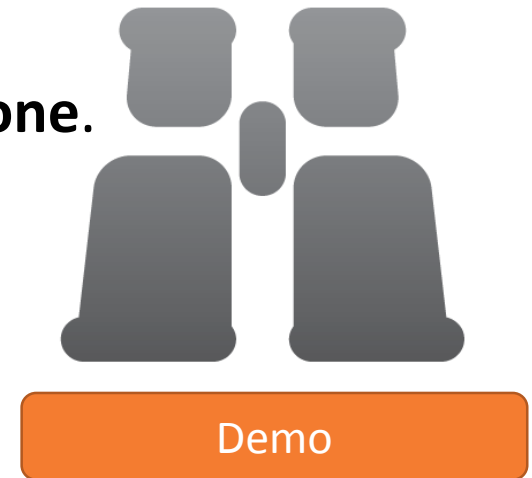
1. Resource Management > Create Inventory > Add Local Electronic Collection.
2. Complete the mandatory fields in the Electronic Collection Editor form: Public Name / Collection Type / Service Type
3. On **Activation Information** tab, update fields or leave default values:
  - Service Activation status
  - Activate new portfolios associated with service automatically
  - Active to and from dates



Demo

## Create a Local Electronic Collection Record (demo; cont.)

4. Additional Information tab > Service Type > Full Text
5. On the **Linking Information** tab:
  - Parser Parameters:
  - Linking or Access information for the service
6. On the **Portfolios** tab: Click *Add a Local Portfolio*
7. Fill out fields as needed, then **Save and Done**.



# Create a Local Electronic Collection for a Database (demo)

Create a local electronic collection for a *database* and order title:

1. Go to **Resource Management > Create Inventory > Add Local Electronic Collection**.
2. Select collection type of *Database*. Fill in details and click **Save and Continue**.
3. Enter details and in **Additional Information** tab:
  - Electronic Collection Level *URL*
  - Find/link to bib record in Additional Descriptive Information field
4. Click **Save**; Click **Order** link.



Demo

### III. Create Local Portfolio and Order Title

- Local portfolio records can be created for standalone portfolio titles
- Why create a local portfolio:
  - Electronic resource doesn't exist in Community Zone
- How to create and order a local portfolio:
  - Resource Management > Create Inventory > [Add Local Portfolio](#)
  - Once local portfolio record is created, click [Order](#) link



# Link Standalone Portfolio to Electronic Collection

Optionally can link locally created standalone portfolio to an electronic collection:

ExLibris Alma Sandbox

Tasks Analytics Currently at: Main Library - Main Library...

Electronic Portfolio Editor **Attach to an electronic collection**

Resource description [Cuban Missile Crisis Hillstrom, Laurie Collier. Omnigraphics Detroit : 2015. \[0-7808-1348-0\]](#)

Interface name -

Service ID 5278329750000711

Portfolio ID 5378329740000711

General Information Linking Information Coverage Information Acquisition Information Notes History

Portfolio availability ☐ Not Available ☒ Available

Activation date 2017/05/04

Interface name

Electronic material type

Expected activation date -

Library Main Library



# Create Local Standalone Portfolio Record and Order Title (demo)

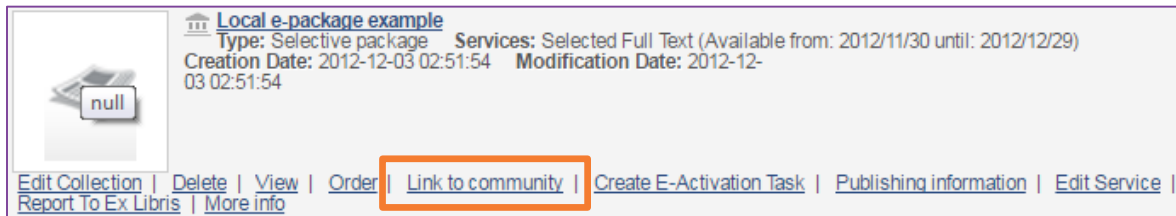
1. Go to **Resource Management > Create Inventory > Add Local Portfolio**.
2. Enter details and then click **Save**:
  - Creation type: choose either create new title or use existing title
  - Portfolios type: Standalone
  - Enter coverage information & URL
  - Availability status: Inactive
3. Click [Order](#) link to create PO line.




Demo


# Link Local Record to CZ Record

- Optionally can link locally-created collections to Community Zone records
- Linking to Community Zone collection automatically applies any updates to your Institution collection



 **Local e-package example**  
Type: Selective package    Services: Selected Full Text (Available from: 2012/11/30 until: 2012/12/29)  
Creation Date: 2012-12-03 02:51:54    Modification Date: 2012-12-03 02:51:54

[Edit Collection](#) | [Delete](#) | [View](#) | [Order](#) | **[Link to community](#)** | [Create E-Activation Task](#) | [Publishing information](#) | [Edit Service](#) | [Report To Ex Libris](#) | [More info](#)

 **Link Electronic Resources To Community**

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**Local Information**

Electronic collection name Local e-package example  
Type Selective package    Interface name -

Service type\* Selected Full Text

Total number of portfolios 0  
Number of local portfolios 0

---

**Community Information**

Electronic collection name\*  
Type -  
Interface name -  
Service type -

---

**Bibliographic Records Configuration**

Match routine By ISBN/ISSN Identifier  
Use the community ☒ Yes ☐ No  
bibliographic records



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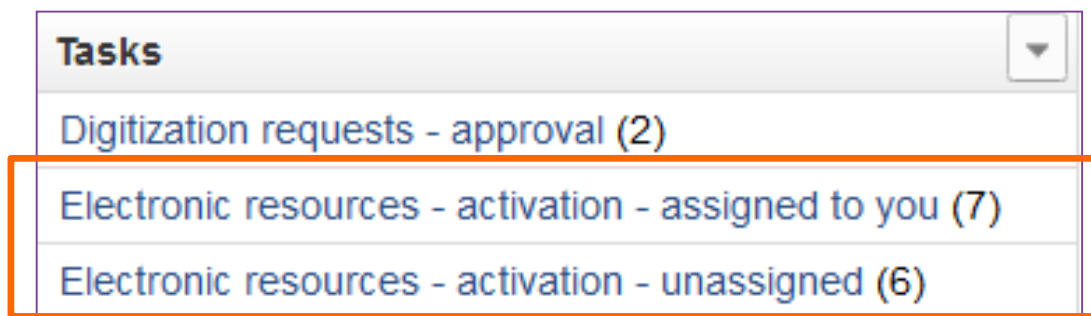
**Other Options and Maintenance**

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**Summary, Resources, and Survey**

# Electronic Resource Activation

Accessed from Task List or Resource Management menu:



## RESOURCE MANAGEMENT

### Manage Inventory

Community Zone Updates Task List

Manage Electronic Resource Activation

**Activate** appears in Actions menu if electronic collection is *not* active

- For locally-created collection:
  - Activates linked services and portfolios (if exist)
  - Make edits in collection editor as needed
- For CZ-linked collection: Opens activation wizard

View
Edit
Edit Resource
Test Access
Activate
Suppress
Assign to
Release assignment
Done
Delete

Test access appears in Actions menu if electronic collection or portfolio has either of the following:

- Bibliographic record and URL associated with it
- Services associated with it

View
Edit
Edit Resource
Test Access
Activate
Suppress
Assign to
Release assignment
Done
Delete

# Suppress/Unsuppress Bib Record

**Suppress/Unsuppress** action appears if electronic collection has an unsuppressed or suppressed bibliographic record linked to it and a URL.

Clicking it will change the value to its opposite, suppressing or un-suppressing the bibliographic record from being published to Primo

View
Edit
Edit Resource
Test Access
Activate
Suppress
Assign to
Release assignment
Done
Delete



# Activation and Testing Completed

- Select **Done** when completed with testing and resource is activated
  - Electronic Resource removed from activation task list
- Before selecting **Done**:
  - If electronic collection has a bibliographic record linked to it, confirm that it is not suppressed
  - If electronic collection has services, confirm they are active

View
Edit
Edit Resource
Test Access
Activate
Suppress
Assign to
Release assignment
Done
Delete

### Activate electronic collection:

1. Go to **Manage Electronic Resource Activation** task list (unassigned) and find an electronic collection you ordered previously. (from Exercise #1)
2. Click Actions > **Activate** and go through wizard, entering details as applicable.

Select check boxes:

- ☐ Activate this electronic collection service
- ☐ Make service available.



Hands On -Activity

3. Go back to Activation task list (assigned to me) and click **Test Access**.
4. Go back to Activation task list (assigned to me) and click **Done**; electronic resource removed from activation list.
5. Search for electronic collection in Repository; notice icon is now in color.



Hands On -Activity



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# Deactivate/Delete Portfolios

- Manually deactivate full text service and/or delete bib record for electronic collection or portfolio records
- Bulk-delete portfolio records via Repository or Update Inventory Import Profile
  - d in position 5 of the leader of bib record
  - if portfolio has PO line connected, will deactivate portfolio instead of deleting it

Import Profile Details

Profile Type: Repository Profile name: 1.1 Repository import (mixed inventory)

Profile Details Normalization & Validation Match Profile Set Management Tags Inventory Information

Inventory Operations

☐ Electronic ☐ Physical ☐ Mixed ☐ None

Resource type \* 980 subfield \* c

E-Book Mapping

Delete/deactivate portfolios when bibliographic record marked for delete ☐

Portfolio type ☒ Standalone ☐ Part of an electronic collection

Material type Book

Enable proxy False

☐ Single portfolio ☐ Multiple portfolios

```
<marc:record>
<marc:leader>02789cam a2200361 i 4500</marc:leader>
<marc:controlfield tag="001">67664</marc:controlfield>
<marc:controlfield tag="005">20140106110946.0</marc:controlfield>
<marc:controlfield tag="008">130509s2013 nyua
<marc:datafield tag="035" ind1=" " ind2=" " >
<marc:subfield code="a">17731021</marc:subfield>
```

# Ongoing Maintenance: Community Zone Updates

- Community Zone updates happen on a weekly basis
- [Release notes](#) in Ex Libris Documentation Center under Alma > Weekly CKB Updates

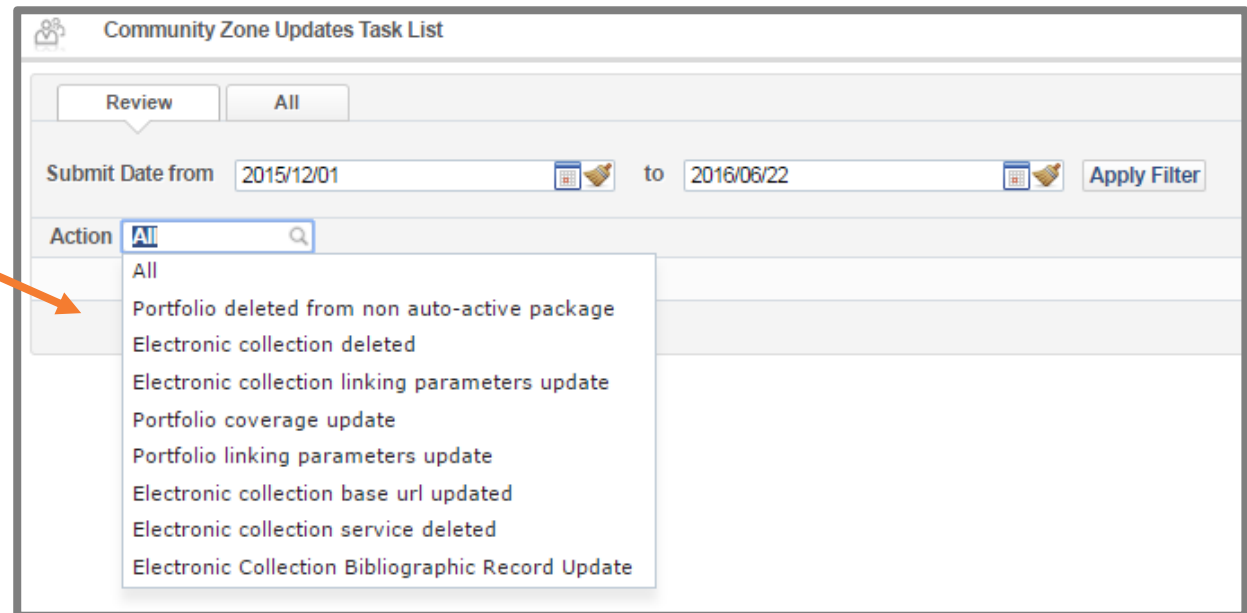
## RESOURCE MANAGEMENT

### Manage Inventory

[Community Zone Updates Task List](#)

[Manage Electronic Resource Activation](#)

Community Zone  
Updates Task List  
includes:



The screenshot shows the 'Community Zone Updates Task List' interface. At the top, there are tabs for 'Review' and 'All'. Below the tabs, there is a date range filter: 'Submit Date from 2015/12/01 to 2016/06/22' with an 'Apply Filter' button. The 'Action' dropdown menu is open, showing a list of tasks: 'All', 'Portfolio deleted from non auto-active package', 'Electronic collection deleted', 'Electronic collection linking parameters update', 'Portfolio coverage update', 'Portfolio linking parameters update', 'Electronic collection base url updated', 'Electronic collection service deleted', and 'Electronic Collection Bibliographic Record Update'.

# Community Zone Updates Task List

- **Review tab:** Records which you may need to review and make updates
- **All tab:** All changes and updates to Community Zone records
  - Note: Use filter to see if portfolios were *automatically* added or deleted from auto-active packages

Community Zone Updates Task List

Cancel

Dismiss Selected

Execute

Back

Review

All

Submit Date from 08/01/2014 to 10/01/2014 

Apply Filter

Filter : All

Find : in : Title 

Go

1

2

3

Go

1 - 20 of 9,422 Records 

Tools

		Report type	Electronic Collection Name	Title	Identifier	Submit Date	Before Change	After Change	Local Information	
1	<input type="checkbox"/>	Portfolio coverage update	Business Source Premier(Business Source Premier)	<a href="#">Corn Products International SWOT Analysis</a>	-	09/29/2014	Available from 2013 until 2013.	null	-	<div>Actions</div>
2	<input type="checkbox"/>	Portfolio coverage update	Elsevier ScienceDirect Free Access Journals	<a href="#">Angiologia e Cirurgia Vascular</a>	1646-706X	09/29/2014	null	Available from 2013 volume: 9 issue: 2.	-	<div>Actions</div>
3	<input type="checkbox"/>	Portfolio coverage update	Business Source Premier(Business Source Premier)	<a href="#">Primus, Inc. SWOT Analysis</a>	-	09/29/2014	Available from 2005 until 2005.	null	-	<div>Actions</div>



# Overlap Analysis Reports

## RESOURCE MANAGEMENT

### Search

Repository Search  
Manage Exports  
Manage Collections

### Cataloging

Search External Resources  
Browse Bibliographic Headings  
Browse Shelf Listing  
Open Metadata Editor  
Authority Control Task List  
Reminders

### Create Inventory

Add Local Electronic Collection  
Add Local Portfolio  
Add Physical Item  
Add Digital Representation

### Manage Inventory

Community Zone Updates Task List  
Manage Electronic Resource Activation  
Shelf Report

### Import

Import  
Upload Single Record From File  
Monitor and View Imports  
Resolve Import Issues

### Advanced Utilities (Internal)

Manage deleted repository

### Advanced Tools

Overlap and Collection Analysis  
Duplicate Title Analysis  
Digital Uploader

- Compare sets of electronic collections to identify overlapping titles between collections
- Download an Excel file of specific portfolio titles (ISSN, LCCN, IBSN, or Titles) to determine if they exist more than once in the repository
- Can be used for collection development purposes



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# Summary

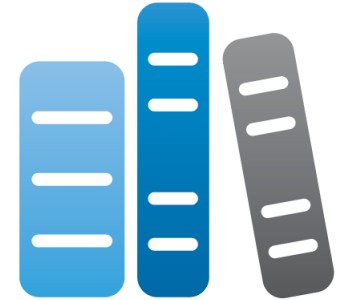
During this session, you learned how to:

- Conduct workflows for acquiring and activating electronic resources
- Configure/set-up other electronic resource options
- Conduct ongoing maintenance using Community Zone Updates Task List



# Resources

- Helpful Documentation:
  - [Managing Electronic Resources](#)
  - [Electronic Resources – Scenarios and Workflows](#)
  - [Adding a Local Collection](#)
  - [Working with Electronic Collection Bibliographic Records and URLs Added to the Community Zone](#)
- Additional support resources within the ExLibris Ecosystem:
  - [Idea Exchange](#)
  - System Status Pages: [Single Tenant ENV](#) / [Multi-Tenant ENV](#)
  - [Developer Network](#)
- [Technical Seminar Presentations](#)  
(located in the Cross-Product section of the CKC)



Please enter the following link into your browser:

<https://www.surveymonkey.com/r/techsem2017>



Thank You

Carolyn Sprague | Training Consultant  
Kevin Lane-Cummings | Senior Training and Consulting Partner