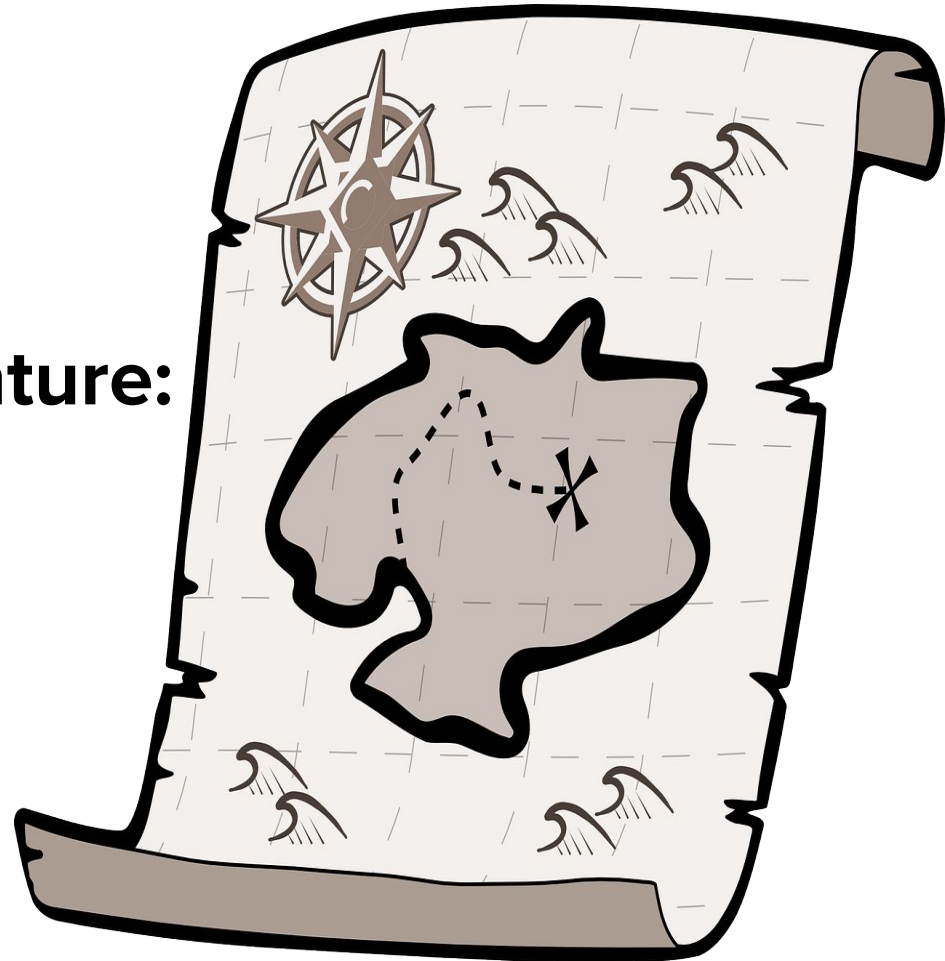


Choose Your Own Adventure: Single Title eBook Activation in Alma

December 4, 2019



Goal of this Training:

Demonstrate workflows to activate and provide access to single ebooks when one of the two following cases are true:

- A portfolio for the ebook does not exist in the CZ
- A portfolio for the ebook does exist in the CZ, but not from the desired vendor and/or interface

Pick Your Ending!

Create a local portfolio and do one of the following options with that portfolio:

- Link the portfolio to the CZ
- Link the portfolio to an existing electronic collection in the CZ
- Add a set of local portfolios to a local electronic collection

Why these workflows?

SUNY recommends using the CZ whenever possible because CZ records require the least long-term maintenance as these records are maintained by Ex Libris. Locally created records require local ongoing attention and maintenance.

Campuses are encouraged to submit Salesforce tickets to Alma Data Services when portfolios are missing from the CZ or in instances of missing or poor quality metadata are found.

Other Support Options:

ProQuest Support

Messages and Alerts

[Link to Salesforce Documentation](#)

[Escalation Policy](#)

[Case Status Definitions](#)

[Contact Us](#)

Welcome, Alana Nuth

Case Edit

Case Edit

Submit

Add attachment & Submit

Cancel

Case Details

Account Name SUNY Geneseo

Asset SUNY Geneseo- Alma Data Services

Affected Environment Production Environment

Publish to all

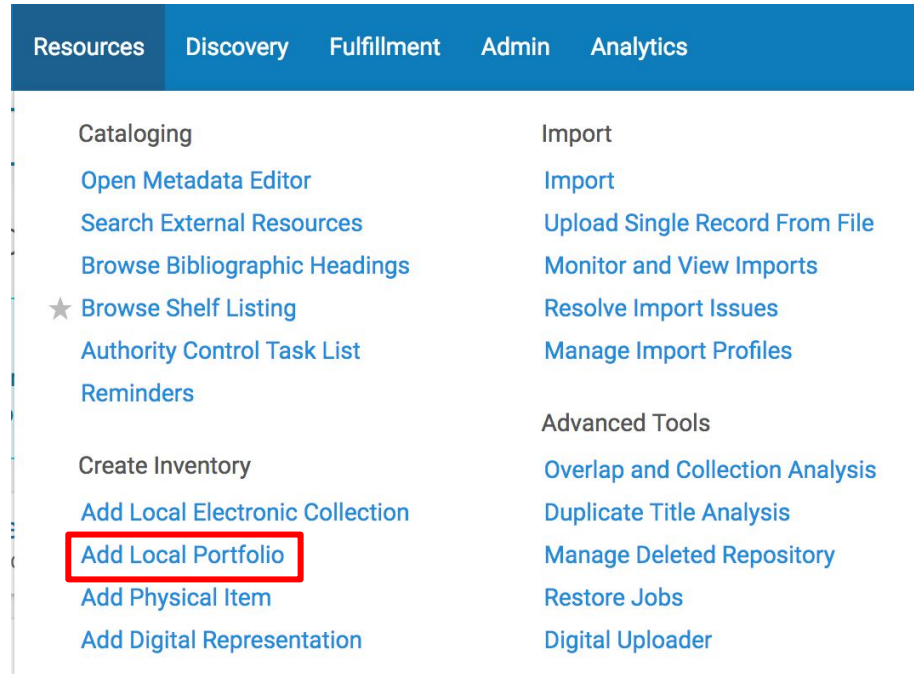
Priority Normal

Database Collection

Description Information

Create a Local Portfolio

Resources → Create Inventory → Add Local Portfolio



The image shows a navigation menu for a library management system. The menu is organized into two columns. The left column contains options under 'Cataloging' and 'Create Inventory'. The right column contains options under 'Import' and 'Advanced Tools'. The 'Add Local Portfolio' option is highlighted with a red rectangular box.

Resources	Discovery	Fulfillment	Admin	Analytics
Cataloging				Import
Open Metadata Editor				Import
Search External Resources				Upload Single Record From File
Browse Bibliographic Headings				Monitor and View Imports
★ Browse Shelf Listing				Resolve Import Issues
Authority Control Task List				Manage Import Profiles
Reminders				
Create Inventory				Advanced Tools
Add Local Electronic Collection				Overlap and Collection Analysis
Add Local Portfolio				Duplicate Title Analysis
Add Physical Item				Manage Deleted Repository
Add Digital Representation				Restore Jobs
				Digital Uploader

Descriptive Information

Creation Type Create new title Use existing title

Record Type One Time Continuing

Placement of new record Network Institution

Choose Title

Title * **Ocean Circulation**

Author **Angela Colling**

Alternative Title 1

Alternative Title 2

ISSN

e-ISSN

ISBN

9786611034955

e-ISSN

Language **English**

General Information

Portfolio type Standalone Part of an electronic collection

Electronic Collection

Service

Interface Name

Elsevier ScienceDirect

Library

Milne Library

COUNTER Platform

Coverage Information



DATE INFORMATION

From Year

Until Year

From Month

Until Month

From Day

Until Day

From Volume

Until Volume

From Issue

Until Issue

EMBARGO/ROLLING YEAR

Operator

Number of Years

Number of Months

Leave Coverage Information blank for ebooks

Inventory and Linking Information ▼

URL

Proxy enabled No Yes

Proxy selected

Availability status Inactive Active

Electronic material type

In the Inventory and Linking Information section:

- Enter the URL provided by the access provider
- Enable the proxy
- Make the portfolio available
- Select “Book” as the Electronic material type

Click Save and Done when complete.



1 **Ocean Circulation**

Elsevier ScienceDirect Books: getFullTxt
Creation Date: 10/27/2019 24:12:47 EDT
Modification Date: 10/27/2019 24:12:48 EDT

Edit Portfolio View ...

Portfolio ID:
5345579960004833
Service ID:
6245579990004833
Collection ID:
6145580000004833

- Create E-Activation Task
- Test access**
- Move
- Report To Ex Libris
- Deactivate
- Display in Discovery

[Other details](#)

2 **Ocean Circulation**

Elsevier ScienceDirect: getFullTxt

[Link to comm](#)

Portfolio ID:

Use the ellipses to select Test Access

Link a Local Portfolio to the
Community Zone

Search for the desired Local Portfolio in the IZ and click “Link to Community”

Electronic portfolios ▾ Title ▾ ocean circulation X ↑ ▾ 🔍 Advanced ▾

Electronic Portfolios (1 - 4 of 4) | ocean circulation Save Query

🏠 Institution 🌐 Network 👤 Community

🔗 ⚙️

2 🏠 [Ocean Circulation](#) Link to community Edit Portfolio ⋮

Elsevier ScienceDirect: getFullTxt
Creation Date: 10/27/2019 13:46:15 EDT
Modification Date: 10/27/2019 13:46:15 EDT

Portfolio ID:
5345579920004833

[Other details](#)

Select the desired Portfolio to link and click Next

< Link Standalone Portfolio to Community Zone Collection

1 ?

Cancel **Next**

Select Portfolio from Community Zone

1 - 20 of 25

25

Ocean circulation [electronic resource].
Elsevier ScienceDirect Books: getFullTxt
Creation Date: 02/03/2010 07:07:42 EST
Modification Date: 06/29/2014 08:55:14 EDT

Portfolio ID:
531000000000933504
Service ID:
62100000000002466
Collection ID:
61100000000001811

Verify that the selected portfolio is correct and click Next

< Link Standalone Portfolio to Community Zone Collection

Cancel | Back | **Next**

1 — 2 — ?

Select local Electronic Collection

1 - 1 of 1

1 ●



Elsevier ScienceDirect Books

Type: Selective package

Services: Full Text (Available)

Interface name: Elsevier ScienceDirect

Linking Level: Book

Creation Date: 10/27/2019 24:12:42 EDT

Modification Date: 10/27/2019 24:12:43 EDT

[Other details](#)

Collection ID:
6145580000004833

For the linked portfolio to inherit updates from the CZ, select “Use descriptive metadata from the community” and click Next

< Link Standalone Portfolio to Community Zone Collection

Cancel Back Next

1 2 3 4

Select source of descriptive information

Use descriptive metadata from the community

Keep local descriptive metadata. Note that the descriptive metadata will not be synchronized with updates from the community zone.

Review information and confirm linking by clicking “Link to Community”

< Link Standalone Portfolio to Community Zone Collection

Cancel Back **Link to community**

1 2 3 4

Review and confirm

The selected portfolio will be linked to electronic collectionElsevier ScienceDirect Books.

This portfolio will be linked to the community zone descriptive metadata.

Link a Local Portfolio to an
Existing Electronic Collection
in the Community Zone

If the portfolio has already been created ...

Search for the portfolio in the IZ and click the button to Edit Portfolio

The screenshot shows a search interface for 'Electronic Portfolios'. The search criteria are 'Electronic portfolios' (selected) and 'Title' with the value 'ocean circulation'. The search results show 4 items, with the first two visible. The first item is 'Ocean Circulation' by Elsevier ScienceDirect Books, with creation and modification dates of 10/27/2019 24:12:47 EDT and 10/27/2019 24:12:48 EDT respectively. The second item is also 'Ocean Circulation' by Elsevier ScienceDirect, with creation and modification dates of 10/27/2019 13:46:15 EDT. The 'Edit Portfolio' button for the first item is highlighted with a red box.

Electronic portfolios ▾ Title ▾ ocean circulation X ⬆ 🔍 Advanced ▾

Electronic Portfolios (1 - 4 of 4) ocean circulation Save Query

🏠 Institution 🌐 Network 👤 Community

🔄 ⚙️

1 👤 **Ocean Circulation** [Edit Portfolio](#) View ⋮

Elsevier ScienceDirect Books: getFullTxt
Creation Date: 10/27/2019 24:12:47 EDT
Modification Date: 10/27/2019 24:12:48 EDT

Portfolio ID: 5345579960004833
Service ID: 6245579990004833
Collection ID: 614558000004833

[Other details](#)

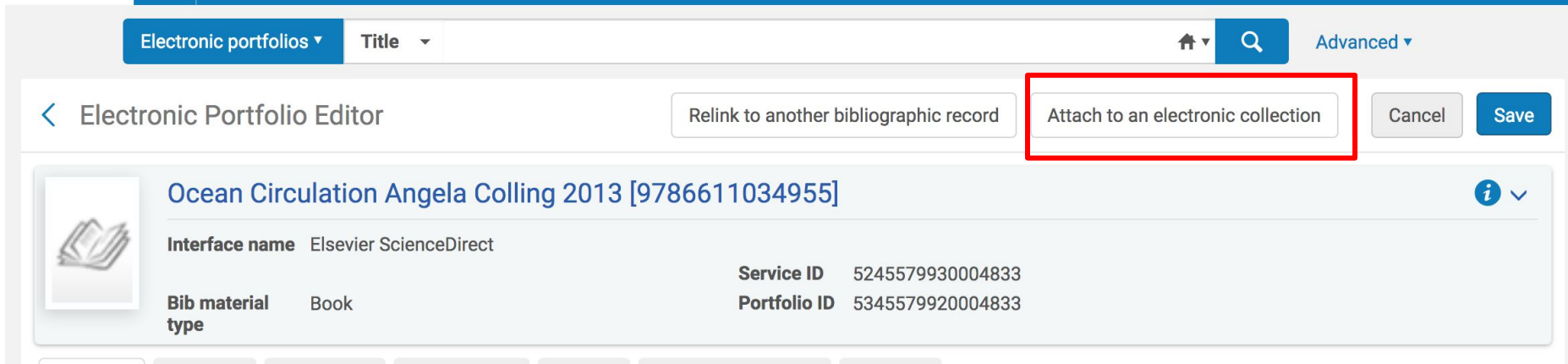
2 🏠 **Ocean Circulation** [Link to community](#) [Edit Portfolio](#) ⋮

Elsevier ScienceDirect: getFullTxt
Creation Date: 10/27/2019 13:46:15 EDT
Modification Date: 10/27/2019 13:46:15 EDT

Portfolio ID: 5345579920004833 [Edit Portfolio](#)

[Other details](#)

In the Electronic Portfolio Editor, click the button to Attach to an Electronic Collection



The screenshot displays the 'Electronic Portfolio Editor' interface. At the top, there is a navigation bar with 'Electronic portfolios' and 'Title' dropdown menus, a home icon, a search icon, and an 'Advanced' dropdown. Below this, the main header shows a back arrow, the title 'Electronic Portfolio Editor', and three buttons: 'Relink to another bibliographic record', 'Attach to an electronic collection' (highlighted with a red box), 'Cancel', and 'Save'. The main content area features a card for a record titled 'Ocean Circulation Angela Colling 2013 [9786611034955]'. The card includes a book icon, the interface name 'Elsevier ScienceDirect', the bib material type 'Book', and the service and portfolio IDs: 'Service ID 5245579930004833' and 'Portfolio ID 5345579920004833'. An information icon is visible in the top right corner of the card.

Electronic portfolios ▾ Title ▾


⌂ 🔍 Advanced ▾

< Electronic Portfolio Editor

Relink to another bibliographic record

Attach to an electronic collection

Cancel Save

 Ocean Circulation Angela Colling 2013 [9786611034955] ⓘ ▾

Interface name Elsevier ScienceDirect

Bib material type Book

Service ID 5245579930004833

Portfolio ID 5345579920004833

Search for and select the desired electronic collection
Select "Full Text" as the Service
Click Confirm

» Acquisitions Resources Discovery Fulfillment Admin Analytics

Select a collection and service

Electronic Collection ✕ ☰ 🔄

Service * ▼

Cancel Confirm

< Electronic Portfolio Editor

Relink to another bibliographic record

Cancel

Save



Ocean Circulation Angela Colling 2013 [9786611034955]

Collection name

EBSCOhost Education Source

Collection ID 6143849940004833

[View all the collection's...](#)

Service ID

6243849930004833

[View all the collection's...](#)

Service type

Full Text

Provider package code (DB id)

-W8

Portfolio ID

5345579920004833

Bib material type Book



The portfolio successfully attached to EBSCOhost Education Source



General

Linking

Coverage

Acquisition

Notes

Related Portfolios

History

If the portfolio has not yet been created ...

Create an electronic portfolio and do the following:

Select “Part of an electronic collection” as the portfolio type

Select the desired electronic collection

Select “Full Text” as the Service

Select the Library

General Information ▼

Portfolio type Standalone Part of an electronic collection

Electronic Collection * X ☰ ↺

Service * ▼ Interface Name ☰

Library X ☰ ↺

COUNTER Platform

In the Inventory and Linking Information section, the linking information will already be populated.

Enable the proxy, set the Availability status to "Active" and select "Book" as the Electronic material type

Inventory and Linking Information

Parser **ELSEVIER::SCIENCE_DIRECT**

Service parser parameters **host=https://www.sciencedirect.com/science/ & prefsite = sd & shib=\$\$SHIBBOLETH & u_shib=\$\$U_SHIBBOLETH**

Parser Parameters

Or

URL

Proxy enabled No Yes

Proxy selected

Availability status Inactive Active

Electronic material type

Notes

Click Save and Done when complete.

Use the ellipses to Test Access

🏠 Institution 👤 Network 👥 Community

📄 ⚙️

1 👤 **Ocean Circulation** Edit Portfolio View ⋮

Elsevier ScienceDirect Books: getFullTxt
Creation Date: 10/27/2019 24:12:47 EDT
Modification Date: 10/27/2019 24:12:48 EDT

Portfolio ID: 5345579960004833
Service ID: 6245579990004833
Collection ID: 6145580000004833

Other details

2 🏠 **Ocean Circulation** Link to comm

Elsevier ScienceDirect: getFullTxt **Portfolio ID:**

- Create E-Activation Task
- Test access
- Move
- Report To Ex Libris
- Deactivate
- Display in Discovery

Add a Set of Local Portfolios
to a Local
Electronic Collection

Different Paths to the Same Ending

Does a local electronic collection already exist?

Yes: Skip to Slide 34 to add portfolios to that collection

No: Proceed to Slide 28 to create a local electronic collection and add portfolios

Create a Local Electronic Collection

Resources → Inventory → Add a Local Electronic Collection

The image shows a navigation menu for a library system. The menu is organized into a grid with two columns. The top row contains the main navigation categories: Resources, Discovery, Fulfillment, Admin, and Analytics. The 'Resources' category is currently selected, and a sub-menu is displayed below it. The sub-menu items are arranged in two columns. The item 'Add Local Electronic Collection' is highlighted with a red rectangular border.

Resources	Discovery	Fulfillment	Admin	Analytics
Resources				
Cataloging				Import
Open Metadata Editor				Import
Search Resources				Upload Single Record From File
Browse Bibliographic Headings				Monitor and View Imports
Browse Shelf Listing				Resolve Import Issues
Authority Control Task List				Manage Import Profiles
Reminders				
Create Inventory				Advanced Tools
Add Local Electronic Collection				Overlap and Collection Analysis
Add Local Portfolio				Duplicate Title Analysis
				PC to CDI Activation Report

Electronic Collection Editor

Save and continue

Public name * **Ocean Circulation Test**

Public name
(override)

Description

Internal description

Collection type

Selective package

Service type

Full Text


Library

Milne Library

COUNTER Platform



Enter a Public Name for the collection
Select "Selective Package" as the Collection Type
Select "Full Text" as the Service Type
Select the Library
Click Save and Continue when complete.

Collection name Ocean Circulation Test **Collection ID** 6145579830004833
Service type Full Text **Service ID** 6245579820004833 [View all services](#) 

- Activation
- Service Description
- Linking
- Portfolios
- Notes
- History

Service activation status Not Available Available

Active from date 

Active until date 

Service temporarily unavailable message No Yes

Service unavailable message as of date 

Service unavailability reason

In the Electronic Service Editor, set the Service Activation Status to "Available"

Collection name Ocean Circulation Test

Collection ID 6145579830004833



Service type Full Text

Service ID 6245579820004833

[View all services](#)

Activation

Service Description

Linking

Portfolios

Notes

History

Service type

Full Text



Public description

Internal description

Public description
(override)

Verify that the Service Type is "Full Text" in the Service Description tab.

General Linking Information ∨

Parser

Parser (override)

Parser parameters

Parser parameters (override)

URL type Dynamic URL Parser Parameters

Linking level

Service is free? Not Free Free

Crossref supported Yes No

Crossref enabled No Yes INHERIT

Proxy enabled No Yes

Proxy selected

In the Linking tab, verify that the proxy is enabled.

Be sure to click Save!

Cancel

Save

Collection name Ocean Circulation Test

Collection ID 6145579830004833

Service type Full Text

Service ID 6245579820004833

[View all services](#)

Activation

Service Description

Linking

Portfolios

Notes

History

ISBN



[Move Set of Portfolios](#)

[Activate/Deactivate](#)

[Load Portfolios](#)

[+ Add](#)

Status : All CZ Linking : All COUNTER Platform : -



No records were found.

Use the Portfolios tab to add portfolios to this electronic collection:

A single portfolio could be created and then added to this electronic collection by clicking Add, selecting Add Local Portfolio, and completing the steps to create a local portfolio.

Multiple portfolios could be added using the portfolio loader or by adding a set of portfolios. We are going to add portfolios as a set.

Search the IZ for the desired local portfolios and Save Query to create the set

Electronic portfolios ▾ Title ▾ ocean circulation ✕ ⬆ 🔍

Advanced ▾

Electronic Portfolios (1 - 2 of 2) | ocean circulation

Save Query

🏠 Institution 👥 Network 👥 Community

🔗 ⚙️

1 👤 **Ocean circulation [electronic resource].**

Edit Portfolio Additional order ...

Elsevier ScienceDirect Books 1995-2006: getFullTxt
Creation Date: 09/25/2019 10:37:25 EDT
Modification Date: 10/22/2019 17:02:01 EDT

🛒 **Orders:** 1
Portfolio ID:
5346247530004833
Service ID:
6246247560004833
Collection ID:
6146247570004833

Other details

Create a set name and click Save

< Set Details

Cancel

Save

General Information

Set name *

Ocean Circulation Test

Description

Note

Set content type **Electronic portfolios**

Set type **Logical**

Private Yes No

Status Active Inactive

Creation date **11/24/2019 24:01:17 EST**

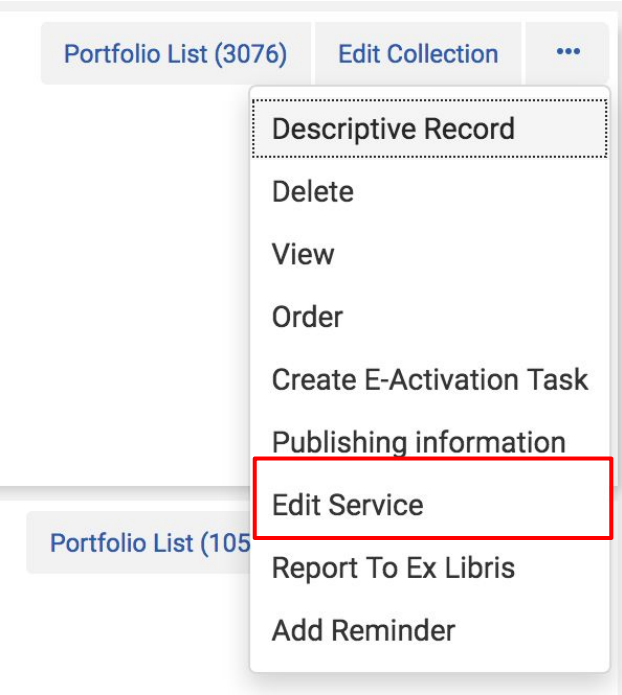
Created by **Ex Libris**

Updated by **Ex Libris**

Content Origin **Institution only**

Set ID -

Search for the electronic collection in the IZ, and use the ellipses to Edit Service. Navigate to the Portfolios tab.



Click Add and Add from Set


Activation Service Description Linking Portfolios Notes History

ISBN

Move Set of Portfolios Activate/Deactivate Load Portfolios **+ Add** **- Delete Selected**

▼ Status : All CZ Linking : All COUNTER Platform : All

Add Local Portfolio
Add from Set


No records were found

Search for and select the desired set of portfolios

Select Set

1 - 1 of 1

Name ▾



Content Type : **Electronic portfolios** ▾

▲ Name	Type	↕ Content Type	Creation Date
1 Ocean Circulation Test	Logical	Electronic portfolios	11/12/2019 23:30:22 EST

Click Confirm on the Confirmation Message

Confirmation Message

Activating this process will add all standalone portfolios derived from this set to the current electronic collection service. Do you want to proceed?

Cancel

Confirm

An activation job will begin and Alma will send a confirmation email when the job is complete.


Electronic Service Editor Cancel Save

Collection name TEST3 Collection ID 6145609960004833
Service type Full Text Service ID 6245609950004833 [View all services](#)

Activation Service Description Linking Portfolios Notes History

ISBN [Move Set of Portfolios](#) [Activate/Deactivate](#) [Load Portfolios](#) [+ Add](#)

Status: All CZ Linking: All COUNTER Platform: -

 No records were found.

i Add set of portfolios job submitted - job id 570580340004833, an email will be sent upon completion. ×

Relevant Documentation:

Local and Standalone Portfolios (presented by Svetlana)

<https://3.basecamp.com/3765443/buckets/8186639/messages/2045202609>

Electronic Portfolios, Linking to Collections, and the Community Zone
(presented by Svetlana)

<https://slcny.libguides.com/c.php?g=935071&p=6749554>

Managing Local Portfolios, Ex Libris

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/040Resource_Management/050Inventory/020Managing_Electronic_Resources](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources)