

Acquisitions Workflows: Electronic Materials Ordering, Invoicing, Renewing & Basic Activation

Week 4 | Session 7
March 4, 2019

ordering electronic materials

ORDER → ACTIVATE → INVOICE

or

RENEW → INVOICE

access to sandbox:

Binghamton (Member 1):

[https://sandbox02-na.alma.exlibrisgroup.com/institution/01S
UNY_BIN](https://sandbox02-na.alma.exlibrisgroup.com/institution/01S
UNY_BIN)

Username: AlmaUser01

Password: Us3rnA!ma

required roles

For managing electronic resources:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended (required for delete operations)
- Repository Manager

For invoicing:

- Invoice Manager
- Invoice Operator
- Invoice Operator Extended

For renewals:

- Purchasing Operator
- Purchasing Manager

ORDERING

electronic material ordering: one-time

Electronic collection ▾ Keywords ▾ archives of sexuality and gender X 👤 ▾ 🔍 Advanced ▾

Electronic Collections (1 - 20 of 110) archives of sexuality and gender

🏠 Institution 🌐 Network 👤 Community

Sort by : Rank ▾

1 🏠 Archives of Sexuality and Gender : LGBTQ History and Culture Since 1940

➡ Type: Database

Creation Date: 2017-06-07 10:23:23

Modification Date: 2017-06-07 10:24:02

Activate Descriptive Record ...

➡ Order

Report To Ex Libris

Electronic collections: organize electronic resources for delivery and publication, and can include electronic journals, portfolios, databases, or ebooks, among others. They can be accessed through a service such as full-text, using bibliographic records and URLs, or by a combination of these.

Service: describes the access to the collection's portfolios
(full text, selected full text, none (portfolios cannot be added; the only option for databases))

Managing Electronic Resources, 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)

RESOURCE TYPE	ACTIVATION	
Database	The collection begins with a database record.	Automatically activated
Aggregator	The entire package of portfolios is added to collection and activated automatically.	Activation process adds a Service (full text or selected full text)
Selective Package	Only selected portfolios from a package are activated.	Activation process adds a Service (full text or selected full text)

[<](#) PO Line Owner and Type

Cancel

Create PO line

1 **Archives of Sexuality and Gender: LGBTQ History and Culture Since 1940****Type:** Database**Creation Date:** - **Modification Date:** -

Description * **Archives of Sexuality and Gender: LGBTQ History and Culture Since**
1940

PO line type * Recommended: Electronic Collection - One Time ▾

PO line
owner * Main Library ▾Load from
template ▾

Purchase Order Line Details

[Save and Request Evaluation](#)[Defer](#)[Order Now](#)[Save](#)[Back](#)[Save and Continue](#)

Archives of Sexuality and Gender: LGBTQ History and Culture Since 1940,

**PO line** POL-7798**PO** -**Status** In Review (2019-03-02)**PO line type** Electronic Collection - One Time**PO line owner** Main Library**Sent date** -[Summary](#)[Description](#)[Alerts](#)[Invoice Lines](#)[Associated PO Lines](#)[Communications](#)[Interested Users](#)[History](#)[Notes](#)[Attachments](#)

Ordered Items



License

[Select from a list](#)[View license](#)

Name	Type	Activation Status	Activation Date	Additional PO Line
Archives of Sexuality and 1 Gender: LGBTQ History and Culture Since 1940	Database	Active	-	...

Because the Type is Database, the Activation Status is Active. Further activation is not necessary.

electronic material ordering: one-time

- complete the POL and click “Order Now”
- Note: if you select “Save and Continue,” the POL will be bundled into a PO during an overnight job. This job, however, is not actively running for our sites so you would have to request Ex Libris to run this job manually for your site.

INVOICING

invoicing

three ways to create an invoice:

- manually or from a PO
- import an EDI from the vendor
- import an Excel spreadsheet

Create an Invoice from a File, Ex Libris:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/030Invoicing/020Creating_Invoices#Creating_an_Invoice_From_a_File](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/030Invoicing/020Creating_Invoices#Creating_an_Invoice_From_a_File)

Create an Invoice from EDI, Ex Libris

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/030Invoicing/020Creating_Invoices#Creating_an_Invoice_by_EDI](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/030Invoicing/020Creating_Invoices#Creating_an_Invoice_by_EDI)



Pur

Purchase Order Lines

Order Without Inventory

★ Review

Claim

Renew

Review Deferred

Manage Trials

Manage EDI Tasks

Purchase Order

Package

Review

★ Approve

Delete PO

Purchase Requests

★ Create Purchase Request

★ Manage Purchase Requests

Check Availability and Pricing

Receiving and Invoicing

★ Receive

★ Create Invoice

★ Review

★ Approve

Waiting for Payment

Post-Receiving Processing

★ Receiving Department Items

★ Scan In Items

Import

★ Manage Import Profiles

★ Import

★ Monitor and View Imports

★ Resolve Import Issues

Acquisitions Infrastructure

★ Vendors

★ Funds and Ledgers

Transfer Funds

Move Funds In Hierarchy

Licenses

License Template

Advanced Tools

Exchange Rates Report

Patron Driven Acquisition (PDA)

Change Vendor In Order

< Select Invoice Creation Process

1 ?

Cancel

Next

Invoice
Creation

☐ Manually

☒ From PO

☐ From File

Handle
Receiving

☐

search by PO to retrieve the Invoice Details page

[<](#) Invoice Details

SaveCancelSave and Continue

PO-10214

Unique invoice identifier151270870004802

Owner Status- Pending

VendorGALE

Total amount500.00 USD

Approved by- (-)
Total invoice lines - amount

SummaryAlertsInvoice LinesHistoryNotesAttachments

1 - 5 of 5

+ Add Invoice Line

Status: AllType: All

Line #	Type	Price	Total Price	VAT Note	Status	Description	Funds	Note	PO Line #
1 999994	Insurance	0.00 USD	0.00 USD	-	In-Review	-	-	-	-
2 999993	Overhead	0.00 USD	0.00 USD	-	In-Review	-	-	-	-
3 999992	Discount	0.00 USD	0.00 USD	-	In-Review	-	-	-	-
4 999991	Shipment	0.00 USD	0.00 USD	-	In-Review	-	-	-	-
5 1	Regular	00.00 USD	500.00 USD	-	Ready	Archives of Sexuality and Gender: LGBTQ History and Culture Since 1940	ABOOK ABOOK (100.0%) (2015/2016)	-	POL-7798 (Sent)/

Click the Save and Continue button to save the invoice and move it to Waiting for Payment status

add or remove additional invoice lines (optional)

Invoice Details

SaveCancelSave and Continue

SummaryAlertsInvoice LinesHistoryNotesAttachments

1 - 5 of 5

+ Add Invoice Line

Status : AllType : All

Line #	Type	Price	Total Price	VAT Note	Stat	Description	Funds	Note	PO Line #	Reporting code	
1 1	Regular	27.00 USD	27.00 USD	Approxim... 0.00 included in line Total Price.	Ready	Dogs	Books STATE - BOOKS (100.0%) (FY-2019)	-	POL-114 (Waiting for Invoice)/	-	...
2 9999...	Shipm...	5.99 USD	5.99 USD	Approxim... 0.00 included in line Total Price.	Ready	Dogs	Books STATE - BOOKS (100.0%) (FY-2019)	-	POL-114 (Waiting for Invoice)/	-	...
3 9999...	Discou...	0.00 USD	0.00 USD	Approxim... 0.00 included in line Total Price.	In- Revi...	-	-	-	-	-	...
4 9999...	OVER...	0.00 USD	0.00 USD	Approxim... 0.00 included in line Total	In- Revi...	-	-	-	-	-	...

EditDeleteView hidden

Delete unused invoice lines by clicking the ellipses and selecting Delete

add or remove additional invoice lines (optional)

Add an invoice line by clicking Edit in the ellipses next to the appropriate invoice line. Add the following information:

- Type and POL
- Price and Quantity
- Fund

PO-201

Line number

999991

Vendor

AMAZON

Invoice Line Details

Type

Shipment

Line number

999991

PO line

POL-114

X

⋮

More Information

Invoice Lines of Current PO Line

Invoice Line Charges

Price

5.99

USD

Price note

Total price

5.99 USD

Quantity

1

VAT note

Approximately 0.00 included in line Total Price.

Reporting code

Secondary reporting code

Note

Tertiary reporting code

Invoice amount

32.99 USD

Total invoice lines amount

-

Funding

+ Add Fund

Redistribute Lines



#	Fund Name	Fund Code	Percent	Amount	
1	- Books (FY-2019) (526.91 USD)	STATE - BOOKS	100.0%	5.99	USD
2	Total -	-	100.0%	5.99 USD	

add or remove additional invoice lines (optional)

Update the Summary tab so the Total amount and Total invoice lines amount are the same. When complete, click Save and Continue.

Summary

Alerts

Invoice Lines

History

Notes

Attachments

Invoice Details

Invoice number *

PO-201

Vendor *

AMAZON

Total amount *

32.99

USD

Vendor contact person

empty (not listed)

Invoice reference #

Owner

Milne Library

Invoice date *

03/02/2019

Vendor account

Amazon Business

Total invoice lines amount

32.99 USD

Payment method

Accounting Department

Creation from

From PO

< Invoice Details

[Save](#)[Back](#)[Save and Continue](#)Vendor **GALE**Vendor account **Gale Cengage**Total amount **500.00 USD**Total invoice lines
amount **500.00 USD**Vendor contact
person **-**Payment method **Accounting Department**Invoice reference # **-**Creation from **From PO**Owner **Main Library**

Additional Charges

Use pro rata **No**

VAT

Report tax ☐VAT % **0.0**VAT type **Inclusive**Amount **0.0**Expended from fund **Yes**Vendor tax (local
currency) **-**

Payment Information

Prepaid **No**Payment status **Paid**Payment identifier **1343434**Payment date **03/02/2019**Payment amount **500.00**

USD

search Invoices and see that the invoice status is Closed

Invoices ▾

Vendor Name ▾

gale

×

Q

Find Invoices (1 - 2 of 2) gale

↕ Invoice #

!

Status

↕ Vendor

Owner

↕ Creator from

↕ Creation Date

↕ Last Updated Date

↕ # of Lines

↕ Total Price

1 PO-10214	0	Closed	Gale Cengage	Main Library	From PO	03/02/2019	03/02/2019	4	500.00 USD	...
2 PO-3115	0	Waiting for Payment	Thomson Gale	Bing... Univ...	From PO	06/06/2013	06/16/2013	5	42.00 USD	...

Binghamton University

**Acquisitions**

Resources

Discovery

Fulfillment

User Management

General

Analytics

Purchase Orders[Reporting Codes](#)[Secondary Reporting Codes](#)[Tertiary Reporting Codes](#)[Purchasing Review Rules](#)[Shipping Method](#)[PO Line Cancellation Reasons](#)[PO Line Types](#)[PO Line Deferral Reasons](#)[Acquisition Method](#)[Searchable Columns](#)**Invoices**[Invoice Review Rules](#)[Invoice Approval Rules](#)[Disapproval Reasons](#)[VAT Codes](#)[Payment Method](#)**Licenses**[Sections Order](#)[Manage License Terms](#)[License Storage Location](#)[License Review Status](#)[Discovery Interface Labels Customized](#)[License Term Controlled Vocabulary](#)**General****Other Settings**[Currency Subset](#)[Fund and Ledger Fiscal Period](#)[Receiving Department Validations](#)[Fund Types](#)[Acquisition Jobs Configuration](#)[Subscribers](#)[Purchase Request Reject Reasons](#)[Legal Deposit Reports](#)

invoicing configuration

Automatic processing: invoice_skip_erp = true

< Mapping Table

Cancel Save

You are configuring: Binghamton University [Change Organization Unit](#)

Customer Parameters



Table Description Customer Parameters
Customization mode: Specific rows can be customized



19	invoice_skip_erp	acquisition	true	Dont send invoices to E		exl_impl	01/08/2019	...
----	------------------	-------------	------	-------------------------	--	----------	------------	-----

Remember to click **Save**

invoice review and invoice approval rules

Configuring Invoice Approval Rules, Ex Libris

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/110Configuring_Acquisitions/110Configuring_Invoice_Approval_Rules](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/110Configuring_Acquisitions/110Configuring_Invoice_Approval_Rules)

Configuring Invoice Renewal Rules, Ex Libris

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/110Configuring_Acquisitions/100Configuring_Invoice_Review_Rules](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/110Configuring_Acquisitions/100Configuring_Invoice_Review_Rules)

invoicing configuration to remove unwanted invoice lines

Invoice Line Details

Type

🔍 Look-up or select ▼

PO line

Regular

Shipment

Discount

Invoice Lines of Current

Binghamton University ▼

 Look-up or select 

Acquisitions

Resources

Discovery

Fulfillment

User Management

General

Analytics

Secondary Reporting Codes

Tertiary Reporting Codes

Purchasing Review Rules

Shipping Method

PO Line Cancellation Reasons

PO Line Types

PO Line Deferral Reasons

Acquisition Method

Searchable Columns

Invoices

Invoice Review Rules

Invoice Approval Rules

Disapproval Reasons

VAT Codes

Payment Method

Invoice Line Types

Manage License Terms

License Storage Location

License Review Status

Discovery Interface Labels Customized

[License Term Controlled Vocabulary](#)**General**

Other Settings

Currency Subset

Fund and Ledger Fiscal Period

Receiving Department Validations

Fund Types

Acquisition Jobs Configuration

Subscribers

Purchase Request Reject Reasons

Legal Deposit Reports

Survey Question Multiple Choice

If Invoice Line Types does not appear, check this Ex Libris documentation for additional configuration information:

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/110Configuring_Acquisitions/150Configuring_Invoice_Line_Types](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/110Configuring_Acquisitions/150Configuring_Invoice_Line_Types)

select “Customize” from the ellipses for each line type that you would like to disable

< Code Table

Cancel

Customize

Invoice Line Types



Customize All



	Enabled	Code	Description	Managed in Network	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	ALL	All		-	-	...
2	<input checked="" type="checkbox"/>	REGULAR	Regular		-	-	Customize
3	<input checked="" type="checkbox"/>	OTHER	Other		-	-	...

click the “enable” button to disable the invoice line and click “Customize” at the top of the screen to save changes

< Code Table

Cancel Customize

Invoice Line Types

Customize All

	Enabled	Code	Description	Managed in Network	Updated By	Last Updated	
1	<input type="checkbox"/>	ALL	All		-	-	...
2	<input checked="" type="checkbox"/>	REGULAR	Regular		-	-	...

RENEWAL

electronic material ordering: continuing

The POL creation process is similar, but Purchase Type must be Subscription.

< PO Line Owner and Type

CancelCreate PO line

1 MEDLINE

Type: Database

Creation Date: - Modification Date: -

Description * MEDLINE

PO line type * Recommended: Electronic Collection - Subscription

PO line owner *

Load from template

Renewal

Manual renewal ☒

Subscription from date

Subscription to date

Renewal date *

Renewal reminder period (days) *

0

Additional

The POL looks the same as a one-time electronic order, expect the Renewal section

manual renewal versus automatic renewal

Manual Renewal

When the Renewal Reminder Period is reached, the renewal will appear in the Task List and require manual intervention. A user will have to update the POL with the next renewal cycle information (subscription from date and subscription to date, renewal date, renewal reminder period) and create an invoice.

Automatic Renewal

The Renewal Date is automatically updated according to the Renewal Cycle and the renewal does not appear in the Task List.

Renewal Workflow, Ex Libris

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/040Renewals/010Renewal_Workflow](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/040Renewals/010Renewal_Workflow)

manual renewal

Renewal

Manual renewal ☒

Subscription from date

01/01/2019

X

📅

Subscription to date

12/31/2019

X

📅

Renewal date *

03/31/2019

X

📅

Renewal reminder period (days) *

30

Manual renewal: leave checked for manual renewal

Subscription from date and **Subscription to date** are optional

Renewal date is mandatory and must occur before the Subscription to date

Renewal reminder period (days): the number of days before the Renewal date that the renewal appears in the Task List

Renewal will appear in Task List, once the Renewal Reminder Period is reached

Main Library - Main Library Acquisitions/Receiving ▾

- Items - in department (85)
- Items - in department - requested by patron (1)
- Order Lines - review - assigned to you (17)
- Order Lines - review - unassigned (10)
- Orders - review (36)
- Orders - approval (53)
- Order Lines with claims (25)
- Order Lines - waiting for renewal (46)**
- Order Lines in evaluation - analysis (6)
- Requests - Digitization - need approval (9)
- Reading List - Unassigned - complete (1)
- Reading List - Assigned - processing (11)

Manual Renewal:

- Update the POL and click “Renew” to put the POL in a status of “Waiting for Renewal” for the next subscription period
- Create an invoice using the POL

Note: the POL will remain open for continuing resources although the invoice for the renewal will close. In this way, the resource will have a single (open) POL and invoices (closed) to reflect each renewal period. The POL will close upon cancellation or if the publication ceases.

Update the POL to Renew


Click on “Order Lines - Waiting for Renewal” in the Task List

Find the POL and click Edit

★ » Acquisitions Resources Discovery Fulfillment Admin Analytics Main Library - Main Library Acquisitions/Receiving ▾

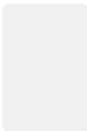
PO Lines to Renew (1 - 20 of 22)

PO line: POL-7713 / (Waiting for Manual Renewal)

4  **Art.**

MMS ID: 9926341204802
Assigned to: -
Type: Access Service - Subscription
PO line owner: Main Library
Standard number: -
PO: PO-8222
PO line: POL-7711 / (Waiting for Manual Renewal)

Total price: 1.00 USD
Funds: -
Vendor/Account: AAAS / AAAS AAA
Vendor reference ID: -

5  **Bacon Ebsco Couperin Vente-Gestion-Frh,**

Assigned to: -
Type: Electronic Collection - Subscription
PO line owner: Main Library
Standard number: -
PO: PO-9905
PO line: POL-7486 / (Waiting for Manual Renewal)

⌵ Electronic Continuous (1)

Electronic resources - activation - passed due date - u
Invoices - review - assigned to you (3)
Invoices - review - without assignment (19)
Items - in department (85)
Items - in department - requested by patron (1)
Order Lines - review - assigned to you (17)
Order Lines - review - unassigned (10)
Orders - review (36)
Orders - approval (53)
Order Lines with claims (25)
Order Lines - waiting for renewal (46)

Edit Close ...

License status: -
Activation status: Activated E-Resource
Renewal date: -
Sent date: 01/09/2019
At least one of the reporting codes is missing

Edit the POL

Edit the POL with the new subscription period information (and any other information, as necessary):

Renewal

Manual renewal

☒

Subscription from date

03/01/2019

X

Subscription to date

02/29/2020

X

Renewal date

02/28/2020

X

Renewal reminder period (days)

90

Additional

Click the “Renew” button to put the renewal back into a status of “Waiting for Renewal” and repeat the process for the next subscription renewal.

invoice for continuing resources

- create an invoice using the POL for the resource following the same process as a one-time electronic order. Close the invoice.

regarding renewals

The FPC Factor or Fiscal Period Closure Factor assigns a percent increase to encumbrances for POL roll-overs for multiyear contracts.

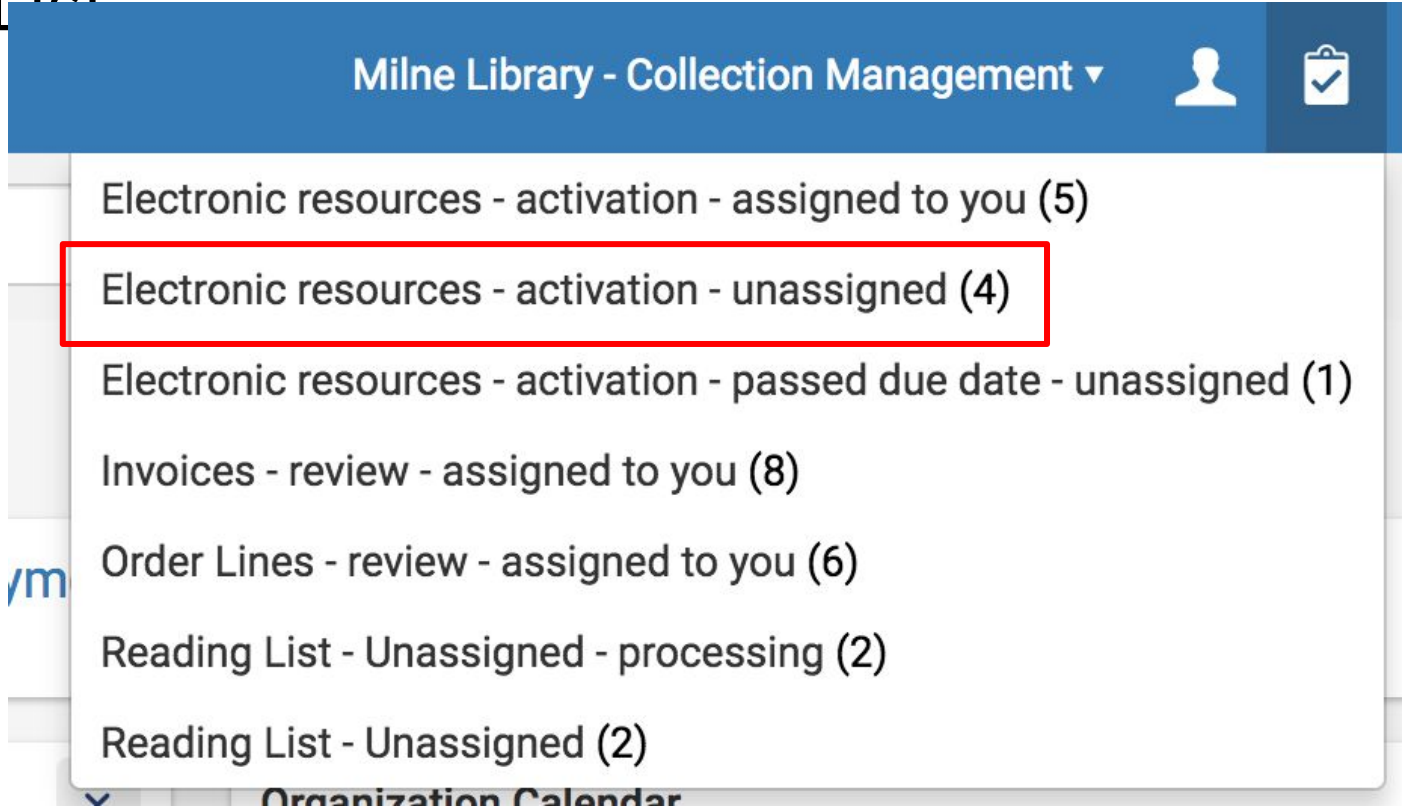
The FPC factor is not something that is handled in renewals, but instead for rolling over to the next fiscal year.

Fiscal Period Closure, Ex Libris

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/020Acquisitions/100Advanced_Tools/020Fiscal_Period_Closure](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/100Advanced_Tools/020Fiscal_Period_Closure)

ACTIVATION

find the resource to activate in the Task List



The screenshot shows the 'Milne Library - Collection Management' header with a user profile icon and a clipboard icon. A dropdown menu is open, listing several task categories. The category 'Electronic resources - activation - unassigned (4)' is highlighted with a red rectangular border.

- Milne Library - Collection Management ▾
- Electronic resources - activation - assigned to you (5)
- Electronic resources - activation - unassigned (4)**
- Electronic resources - activation - passed due date - unassigned (1)
- Invoices - review - assigned to you (8)
- Order Lines - review - assigned to you (6)
- Reading List - Unassigned - processing (2)
- Reading List - Unassigned (2)
- Organization Calendar

in the Electronic Resources Activation Task List, click the ellipses next to the resource

Electronic Resource Activation Task List

Assigned to Me Unassigned Assigned to Others

1 - 4 of 4 Title [] [] Change Status [] [] []

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

	MMS ID	Title	Status Date	Type	Status	Due Date	Expect Activat Date	PO Line Owner	Order Line	Intereste Users	No
1	995340550304833	Baking Muffins	02/06/20...	Portfolio	Chec...	03/08/2019	02/0...	Milne Library	POL-13	✓	...
2	995339250104833	Cats /	01/21/20...	Portfolio	Chec...	02/20/2019	01/2...	Milne Library	POL-10		
3	995339250204833	Cats /	02/23/20...	Portfolio	Chec...	03/25/2019	02/2...	Milne Library	POL-10		
4	995340749704833	Mathematics teacher	02/25/20...	Portfolio	Chec...	03/28/2019	02/2...	Milne Library			

View
Edit
Edit Resource
Test Access
Activate
Assign to
Done
Delete
View hidden

Click **Activate** to start the Activation Wizard

Assign To: assign the task of activating the resource to another Alma user, with or without a notification email.

Activation Wizard: Electronic Collection and Services Setup

Public Name: this name overrides the resource name and will display to the public

Library: optionally select your library

Mark Bib as suppressed & Electronic Collection Proxy Enabled: unsuppressing the bib record will display a collection-level bib record in Primo. If this box is unchecked and the bib is unsuppressed, it's also necessary to enable the Electronic Collection Proxy Enabled and select the Electronic Collection Proxy Selected

[<](#) Activation Wizard: Electronic Collection and Services Setup

1

?

Cancel

Next

EBSCOhost MasterFILE Complete

Type

Aggregator package

Number of portfolios

6705

Electronic Collection Level URL

-

Additional descriptive information

MasterFILE Complete

Local Electronic Collection Information

Public name

Level URL

Mark Bib as suppressed

☒

Electronic Collection Proxy Enabled

☒ No ☐ Yes

Library

Milne Library

X

⋮

↺

Additional descriptive information

MasterFILE Complete

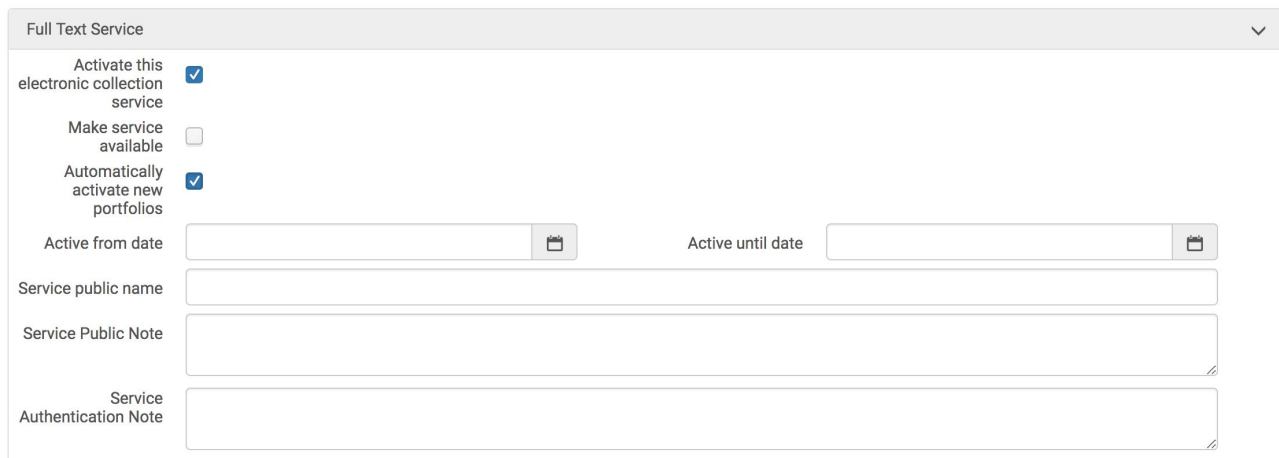
X

⋮

Electronic Collection Proxy Selected

▼

Activation Wizard: Electronic Collection and Services Setup



The screenshot shows a web form titled "Full Text Service" with a dropdown arrow in the top right corner. The form contains several configuration options for an electronic collection service:

- Activate this electronic collection service:** A checkbox that is checked with a blue checkmark.
- Make service available:** An unchecked checkbox.
- Automatically activate new portfolios:** A checkbox that is checked with a blue checkmark.
- Active from date:** A text input field followed by a calendar icon.
- Active until date:** A text input field followed by a calendar icon.
- Service public name:** A single-line text input field.
- Service Public Note:** A multi-line text area with a small icon in the bottom right corner.
- Service Authentication Note:** A multi-line text area with a small icon in the bottom right corner.

Activate this electronic collection service: check this box to activate

Make service available: make the access available to the public - do not check this box just yet

Automatically activate new portfolios: check for aggregators; do not check for selective packages

Active from date and Active until date: leave these fields blank, unless setting up a trial

Service public name, Service Public Note, and Service Authentication Note: all these fields display to the public.

Click **Next**.

Activation Wizard: Linking Information

< Activation Wizard: Linking Information

1 2 3 ? Cancel Back Next

EBSCOhost MasterFILE Complete

Type Aggregator package

Number of portfolios 6705

Electronic Collection Level -

URL

Additional descriptive information MasterFILE Complete

Full Text Service - Linking Parameters

	Parameter Name	Value
1	SHIBBOLETH	<input type="text"/>
2	CUSTOMER_ID	<input type="text"/>
3	ATHENS_ID	<input type="text"/>
4	API_USER_ID	<input type="text"/>
5	U_SHIBBOLETH	<input type="text"/>
6	SSO	<input type="text"/>

The Linking Parameters fields are specific to the vendor, and the inputted information is specific to the library. EBSCO, for example, prompts for the EBSCO Customer ID.

Library-Specific Parameters, Managing Electronic Resources, 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)

SFX Target and Alma e-Collection Configuration Guide, Ex Libris (EBSCO starts on page 58)

https://files.mtstatic.com/site_11811/26602/23?Expires=1551618745&Signature=XgvcboQ8gwiiT6X0owGJYooo0eye9Fd dWZZZdgZR9TnsAthPMLcNJM5zrSfQ9hAqfUsbE~~Q3hEhz87cVPPA25km0b8Ky1yohNsn4KO2mQUw7jXemfO1Qxogw CVsesmi9phFyZjQloE5~lp~uWv8WmLnLlytRTsiLrNjns1t~c8_&Key-Pair-Id=APKAJ5Y6AV4GI7A555NA

enable the proxy; Ex Libris recommends using the “default” proxy

Full Text Service - Proxy setup

Proxy enabled

☐ No ☒ Yes

Proxy selected

Default (currently: EZPROXY)

click Next

Activation Wizard: Select Activation Method

Activation Wizard: Select Activation Method

Cancel Back Next

1 2 3 ?

EBSCOhost MasterFILE Complete

Type

Number of portfolios

Electronic Collection Level

URL

Additional descriptive information

Aggregator package

6705

-

MasterFILE Complete

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

Activate all: select this option for aggregator packages

Activate electronic collection and selected portfolios via Excel file download: select this option for selective packages, but know that you'll need a formatted Excel file to select portfolios to activate

Manual activation - activate electronic collection and manually select portfolios: select this option for selective packages; but may not be time-effective for collections with a large number of portfolios

Activate!

< Activation Wizard: Activation Summary



Cancel

Back

Activate

EBSCOhost MasterFILE Complete

Type	Aggregator package
Number of portfolios	6705
Electronic Collection Level	-
URL	
Additional descriptive information	MasterFILE Complete

Activation Summary

Services	Full Text
Number of portfolios to be activated	6705
Additional activation count (electronic collection + service)	2

Monitor Jobs

Back

- Scheduled
- Running
- History

1 - 1 of 1

Job details

Q

Refresh



Job Category : All

	Name	Job Category	Creator	Submit Date	Start Date	Progress	Status	
1	Electronic activation job - EBSCOhost MasterFILE Complete	Repository	NUTH	03/03/2019 07:32:46 EST	03/03/2019 07:33:01 EST	N/A	Running	...

when the job is complete, go back to the Electronic Resource Activation Task List to Test Access

Electronic Resource Activation Task List

Assigned to Me Unassigned Assigned to Others

1 - 4 of 4 Title [Search] Change Status [Icons]

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

	MMS ID	Title	Status Date	Type	Status	Due Date	Expect Activat Date	PO Line Owner	Order Line	Intereste Users	No	
1	<input type="checkbox"/>	995340550304833	Baking Muffins	02/06/20...	Portfolio	Chec...	03/08/2019	02/0...	Milne Library	POL-135	✓	...
2	<input type="checkbox"/>	995339250104833	Cats /	01/21/20...	Portfolio	Chec...	02/20/2019	01/2...	Milne Library	POL-103		
3	<input type="checkbox"/>	995339250204833	Cats /	02/23/20...	Portfolio	Chec...	03/25/2019	02/2...	Milne Library	POL-100		
4	<input type="checkbox"/>	995340749704833	Mathematics teacher	02/25/20...	Portfolio	Chec...	03/28/2019	02/2...	Milne Library	POL-155		

- View
- Edit
- Edit Resource
- Test Access
- Activate
- Assign to
- Done
- Delete
- View hidden

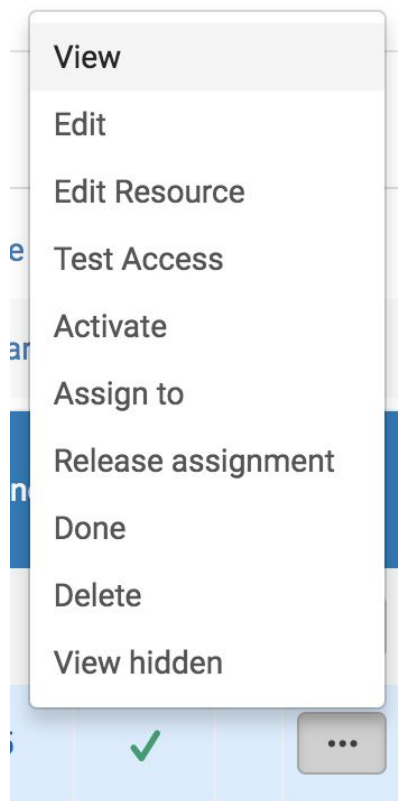
< Online Services

[Display in a new window](#)

Source: Baking Muffins [1-304-01755-9] Martin, J

Full text available at: [EBSCO INDUSTRIES, INC.](#)

Depending on the resource type, a list of portfolios may appear which could be tested individually



Return to the Electronic Resource Activation Task List

Click **Activate**

Click **Done**

It's not necessary to edit the resource when prompted, you can simply click Cancel.

Likewise, you will be prompted about the suppressed bib record if you did not unsuppress it.