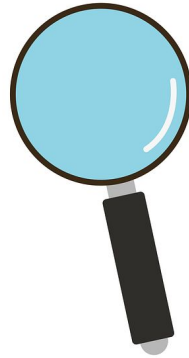


Searching for Electronic Resources in Alma



February 12, 2020 | Alana Nuth

Image from Pixabay.com | <https://images.app.goo.gl/HYof8SGwve37DcRCA>

Our Agenda:



Demonstrate searching in the Alma repository and explore the search limiters, facets, and features that are available



Demonstrate searching the Alma repository for electronic collections activated by other SUNY campuses



Review terminology related to search indexes in Alma for electronic resources

Roles in Alma

All Titles, Electronic Collection, and Electronic Portfolio: All users can search

Order Lines: Invoice Manager, Invoice Operator, Invoice Operator Extended, Purchasing Manager, Purchasing Operator

Vendors: Vendor Manager

Funds: Fund Manager, Fund-Ledger Viewer, Ledger Manager, Purchasing Manager, Purchasing Operator

Licenses: License Manager, Purchasing Operator, Purchasing Manager

Searching in Alma:

It's possible to search the Alma repository in many different ways and the intent behind your search will guide your search terms and limiters.

Electronic Collection & Electronic Portfolio

Search by **Electronic Collection** to retrieve electronic resources (what we would consider to be databases or packages of journal, ebook, and/or streaming video content) with a collection type of: selective package, aggregator package, or database.

Search by **Electronic Portfolio** to retrieve single journals, ebooks, or streaming videos that are available as standalone portfolios or as part of an electronic collection.

Most common limiters: Keyword, Title, Interface Name, MMS ID, OCLC Number

Electronic Collection & Electronic Portfolio: Simple Search

The simple search function is helpful when searching for a known item (search by title or MMS ID) or conducting a browse (search by keyword or interface name). When searching by interface name, be aware that some vendors use multiple interface names (such as Gale)

The screenshot displays a search interface for electronic collections. The search bar at the top shows the search criteria: 'Electronic collection' (selected), 'Interface Name', and 'galegroup'. The search results are displayed as 'Electronic Collections (1 - 20 of 46) | galegroup'. The interface includes a left sidebar with facets, a top navigation bar with search options, and a main content area showing the details of a specific collection.

Facets

- Type
 - Aggregator package (26)
 - Selective package (20)
- Interface
 - Galegroup (46)
- Electronic Collection Type
 - Book Package (4)
 - Journal Package (25)
 - Mixed Material Pac... (17)
- Availability (Electronic Collection)
 - Available (43)
- CDI Search Activation
 - Active for Search (2)

Search Results

Electronic Collections (1 - 20 of 46) | galegroup

Save Query

Institution Network Community

Sort by : Rank

1 Gale Cengage Informe Edit Collection Descriptive Record ...

Type: Aggregator package
Services: Full Text (Not Available)
Interface name: Galegroup
Linking Level: Article
Creation Date: 11/17/2019 13:30:04 EST
Modification Date: 12/04/2019 24:20:36 EST

Collection ID:
6153657430004833

In CDI: Yes
Active for Search in CDI: Yes
CDI Search Rights: Free
CDI Full Text Rights: Subscription (Linkresolver)
CDI Full Text Linking: Linkresolver

[Other details](#)

Electronic Collection & Electronic Portfolio: Simple Search

Narrow search results further by using the facets in the left menu.

For an electronic collection search by interface name, the following facets are available:

- Type (type of resource: database, aggregator package, selective package)

- Interface

- Electronic Collection Type (sort of like a material type facet)

- Availability (Electronic Collection) (resources that are available and activated)

- CDI Search Activation (resources activated in the CDI)

The facets are dynamic and depend on the search limiter. For a search for electronic portfolio using "Is Standalone", for example, the following facets are available:

- Interface

- Service

- Electronic Material Type

- Availability (Electronic Portfolio) (resources that are available and activated)

Electronic Collection: Simple Search

When searching by electronic collection, the following functions are available for each result:

Edit Collection (open the Electronic Collection Editor)

Descriptive Record (view the bib record and verify that the record is suppressed)

Portfolio List (for packages, not databases; view a list of portfolios with additional features available)

Order (create a new POL)

Edit Service (for packages, not databases; open the Electronic Service Editor)

Edit Collection

Descriptive Record

Delete

View

Order

Create E-Activation Task

Publishing information

Edit Service

View It

Report To Ex Libris

Add Reminder

Electronic Portfolio: Simple Search

The simple search for electronic portfolios works in much of the same way as the simple search for electronic collections.

When searching by electronic portfolio, the following functions are available for each result:

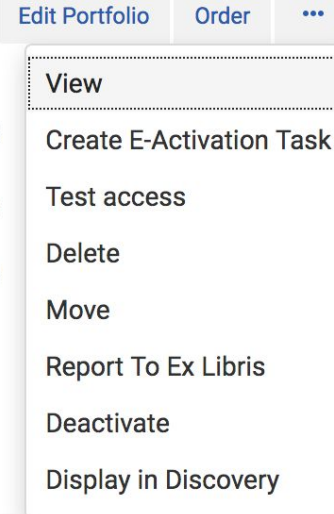
Edit Portfolio (open the Electronic Portfolio Editor)

Order (create a new POL for the portfolio)

Test Access (verify access is working properly)

Deactivate

Report to Ex Libris (submit a case to Ex Libris if linking is bad or missing)



Edit Portfolio Order ...

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

Electronic Collection: Advanced Search

The Advanced Search provides additional functionality to create robust searches that can be used for electronic resources management.

Most common limiters:

Activation Date (as well as Activate to and Activate from)

Availability

CDI fulltext linking

Contributed By

Electronic Collection Name

Electronic Collection PID

Electronic Collection Type

Free (limiters for Electronic Collection and Service)

In CDI

Interface Name

Is Local

Language

Linking Level

Proxy Enabled

Proxy name

Service Type

Electronic Portfolio: Advanced Search

The Advanced Search provides additional functionality to create robust searches that can be used for electronic resources management.

Most common limiters:

Activation Date (as well as Activate to and Activate from)

Availability

CDI fulltext linking

Contributed By

Interface Name

Is Local

Is Standalone

Language

Linking Level

Material Type

Proxy Enabled

Proxy name

Electronic Collection & Electronic Portfolio: Advanced Search

- Add multiple search strings using the boolean operators of AND or OR
- Search operators are relative to the limiters

Example Search:

Electronic Portfolio Is Standalone Equals Yes AND
Material Type (Electronic Portfolio) Equals Book

The screenshot shows an advanced search interface with the following elements:

- Zone:** A dropdown menu set to "Electronic portfolios".
- Location Selection:** Radio buttons for "Institution" (selected), "Network", and "Community".
- Search Criteria 1:** A row with three dropdowns: "Is Standalone", "Equals", and "Yes".
- Search Criteria 2:** A row with three dropdowns: "Material Type (Electronic Po", "Equals", and "Book".
- Boolean Operator:** A button labeled "AND" is selected, with an "OR" button next to it.
- Actions:** Each search criterion row has a "+" icon, a document icon, and an "X" icon for removal.
- Buttons:** "Clear form" and "Search" buttons are located at the bottom right.

Electronic Collection & Electronic Portfolio: Save Query

With any search in Alma, it's possible to save a search query to use later in a job or to update, add, or delete portfolios in a collection.

Electronic Collection & Electronic Portfolio: Save Query

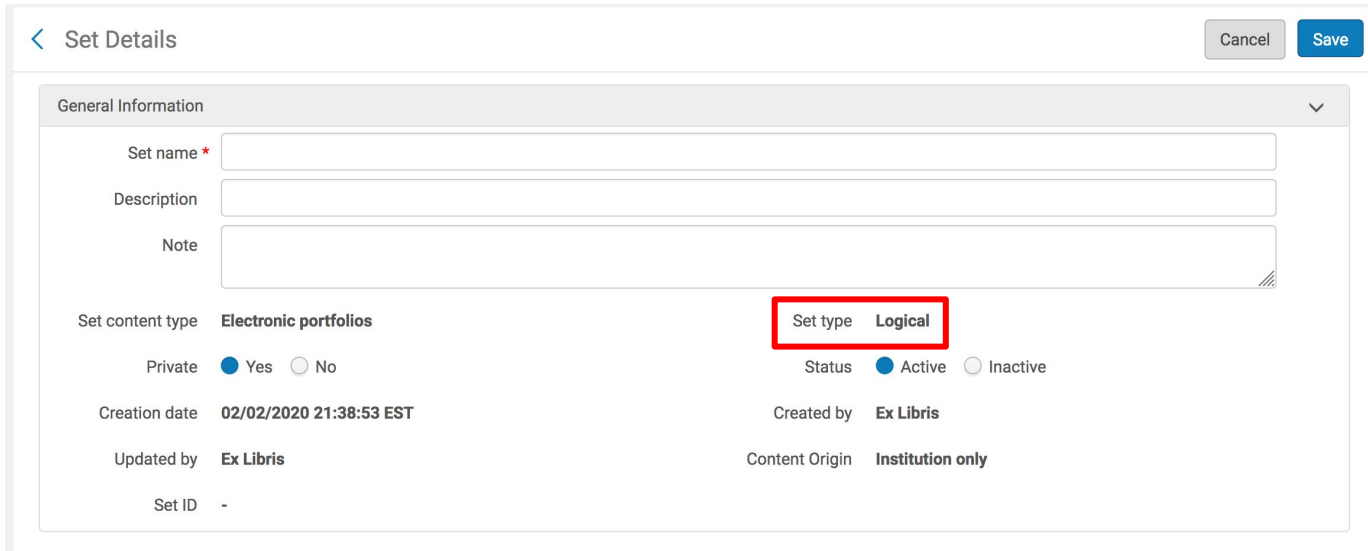
To save a query, perform a repository search and click the Save Query button

The screenshot shows a search interface with the following elements:

- A search bar containing the text "Electronic portfolios" (with a dropdown arrow), "Interface Name" (with a dropdown arrow), and "ebscohost". To the right of the search bar are icons for "X", "up arrow", and a magnifying glass.
- A search button labeled "Advanced" with a dropdown arrow.
- A search results header: "Electronic Portfolios (1 - 20 of 130,194)" followed by "ebscohost".
- A "Save Query" button, which is highlighted with a red rectangular box.
- A navigation bar at the bottom with three tabs: "Institution" (with a house icon), "Network" (with a network icon), and "Community" (with a group of people icon).

Electronic Collection & Electronic Portfolio: Save Query

You will then be prompted to save the query as a set. Note that the set type is Logical. Members of the set will change if records are updated or changed.



The screenshot shows a web interface for 'Set Details'. At the top left is a back arrow and the text 'Set Details'. At the top right are 'Cancel' and 'Save' buttons. Below is a 'General Information' section with a dropdown arrow. It contains several fields: 'Set name *' (empty), 'Description' (empty), and 'Note' (empty). Below these are two rows of metadata. The first row shows 'Set content type' as 'Electronic portfolios', 'Set type' as 'Logical' (highlighted with a red box), 'Private' with 'Yes' selected, and 'Status' with 'Active' selected. The second row shows 'Creation date' as '02/02/2020 21:38:53 EST', 'Created by' as 'Ex Libris', 'Updated by' as 'Ex Libris', and 'Content Origin' as 'Institution only'. The 'Set ID' is shown as '-'.

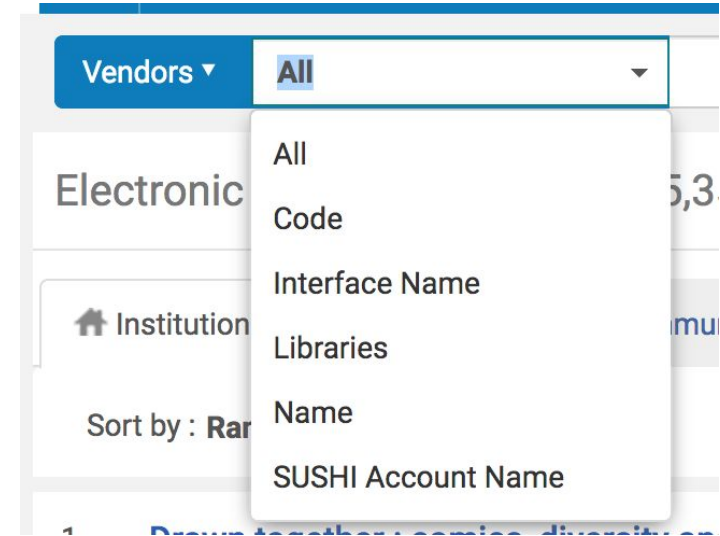
Set name *	<input type="text"/>		
Description	<input type="text"/>		
Note	<input type="text"/>		
Set content type	Electronic portfolios	Set type	Logical
Private	<input checked="" type="radio"/> Yes <input type="radio"/> No	Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Creation date	02/02/2020 21:38:53 EST	Created by	Ex Libris
Updated by	Ex Libris	Content Origin	Institution only
Set ID	-		

Vendor

Search by **Vendor** to locate a known vendor or verify if a vendor record exists for a given vendor.

An Advanced Search option does not exist for Vendor.

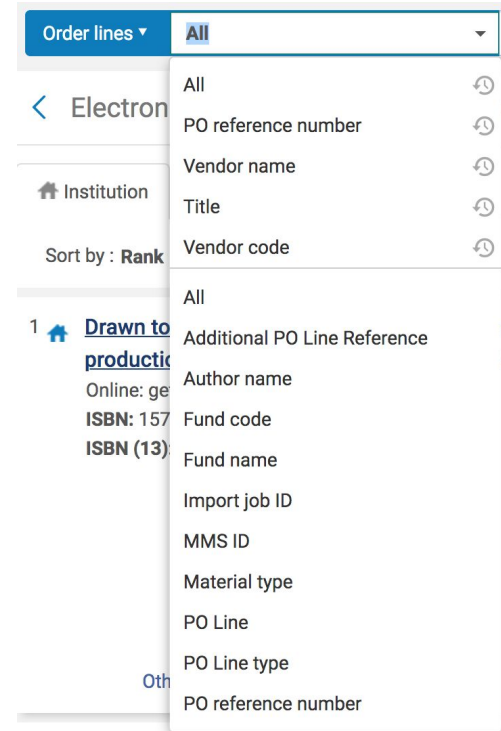
Search limiters include (vendor) code, interface name, libraries, (vendor) name, and SUSHI Account Name



Order Line: Simple Search

Search by **Purchase Order Line** to find a given order.

Common limiters include: Vendor Name, Vendor Code, Title, Fund Name, Fund Code, Material Type, PO Line Type, PO Line, and MMS ID



Order Line: Advanced Search

Advanced Search offers robust options to refine a search.

In addition to the limiters available from the Simple Search, Advanced Search Limiters include: Interested Users, Reporting Code, Access Provider, and Acquisition Method

Example Advanced Search:

Material Type Equals Book AND Interested Users Equals Yes

Retrieve a list of all POLs with a material type of book with interested users

Order lines ▾ ✕

Material type ▾	Equals ▾	Book ▾	+ 📄 ✕	
AND	Interested Users ▾	Equals ▾	Yes ▾	+ 📄 ✕

[Clear form](#) [Search](#)

Purchase Order Lines [Material type Equals Book AND Interested Users Equals Yes](#)

[Back](#)

[Save Query](#)

1 - 20 of 194

[Expand ▾](#)



1



A better planet : 40 big ideas for a sustainable future / edited by Daniel C. Esty ; with a foreword by Ingrid C. Burke., New Haven :, Yale University Press,, 2019, 9780300246247, ISBN

MMS ID: 995398051504833

Assigned to: -

Type: Physical - One Time

PO line owner: Milne Library

Copies: Milne Library - Upper Level-MCIRC (1)

Total price: 27.00 USD

Funds: Books 2019/2020 (100.0%) (FY-2020)

Vendor/Account: YANKEE BOOK PEDDLER

Receiving note: -

Sent date: 10/29/2019

Items already exist in the repository

[Edit](#)

[Change Bib Reference](#)



Invoice

Search for a given **Invoice** or to verify if an invoice exists.

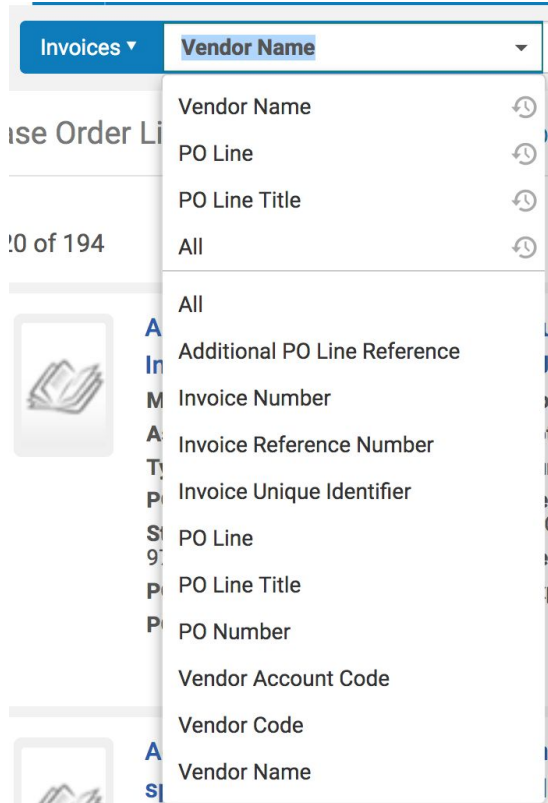
An Advanced Search option does not exist for Invoice.

Limiters for a Simple Search include: PO Line, PO Line Title, PO Number, Vendor Name, Vendor Code, Invoice Number, and Invoice Reference Number. If using the Invoice Number or Invoice Reference Number for the vendor's invoice number, it will be easy to search and find an invoice in Alma using the invoice number from the vendor.

Facets are stable.

Invoice

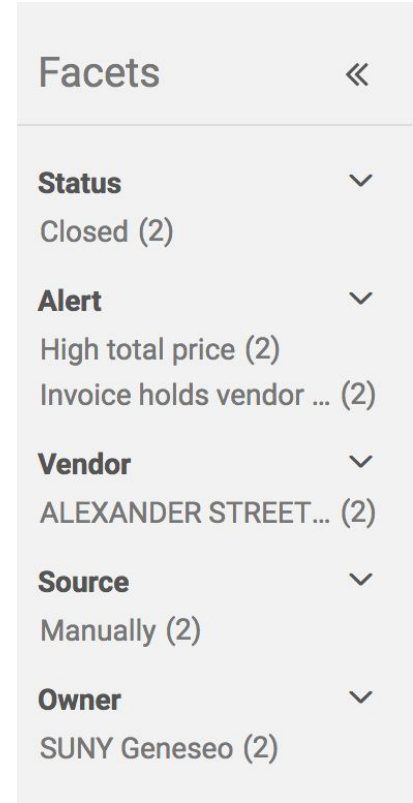
Search Limiters



The screenshot shows a search interface for 'Invoices'. A dropdown menu is open, displaying a list of search limiters. The selected limiter is 'Vendor Name'. The list includes various fields such as 'Vendor Name', 'PO Line', 'PO Line Title', 'All', 'Additional PO Line Reference', 'Invoice Number', 'Invoice Reference Number', 'Invoice Unique Identifier', 'PO Line', 'PO Line Title', 'PO Number', 'Vendor Account Code', 'Vendor Code', and 'Vendor Name'. Each item has a circular refresh icon to its right.

- Vendor Name
- PO Line
- PO Line Title
- All
- All
- Additional PO Line Reference
- Invoice Number
- Invoice Reference Number
- Invoice Unique Identifier
- PO Line
- PO Line Title
- PO Number
- Vendor Account Code
- Vendor Code
- Vendor Name

Facets



The screenshot shows a facets sidebar with a 'Facets' header and a double-left arrow icon. The sidebar lists several facets, each with a dropdown arrow and a count in parentheses:

- Status** (2)
 - Closed (2)
- Alert** (2)
 - High total price (2)
 - Invoice holds vendor ... (2)
- Vendor** (2)
 - ALEXANDER STREET... (2)
- Source** (2)
 - Manually (2)
- Owner** (2)
 - SUNY Geneseo (2)

Fund

Search for a given **Fund** or to verify if a fund exists.

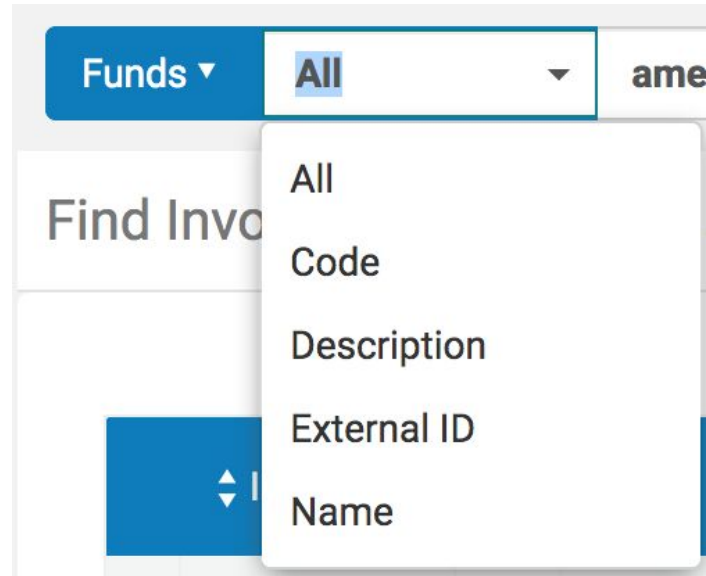
An Advanced Search option does not exist for Fund

Limiters for a Simple Search include: (Fund) Code, Description, and Name

Facets are stable.

Fund

Search Limiters

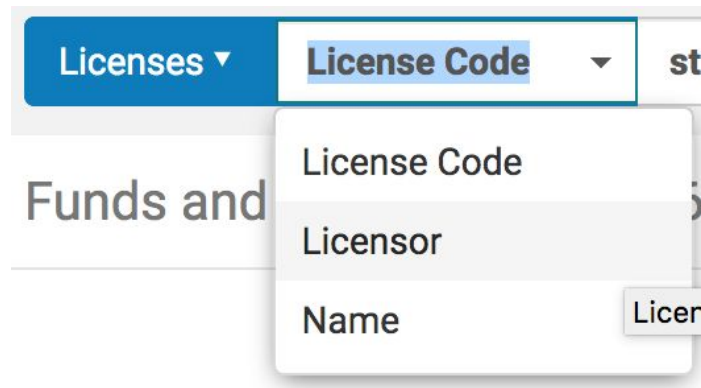


Facets

Facets	«
Status	▼
Active (6)	
Type	▼
Allocated fund (5)	
Summary fund (1)	
Fiscal Period	▼
FY-2020 (6)	
Ledger	▼
Milne Collections 20... (6)	
Owner	▼
SUNY Geneseo (6)	
Available For	▼
SUNY Geneseo (5)	

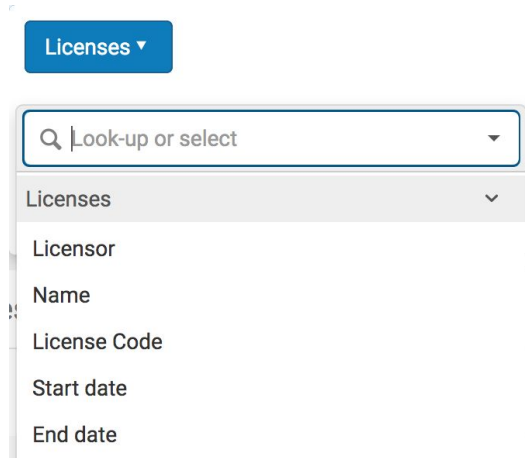
License: Simple Search

Search for a given **License**. Limiters include: License Code, Licensor, and Name.

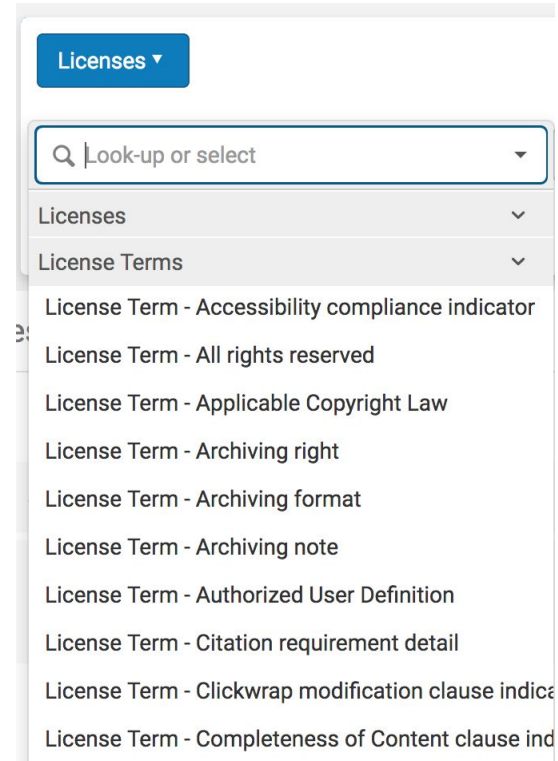


License: Advanced Search

Use the Advanced Search to search for a given License Term within the License, or to narrow a search further by searching Review Status, Signed On Date, Start Date and End Date.



A screenshot of a software interface showing a dropdown menu for 'Licenses'. At the top is a blue button labeled 'Licenses' with a downward arrow. Below it is a search box with a magnifying glass icon and the placeholder text 'Look-up or select'. The dropdown menu is open, showing a list of options: 'Licenses', 'Licensor', 'Name', 'License Code', 'Start date', and 'End date'. Each option has a small downward arrow to its right.



A screenshot of a software interface showing a dropdown menu for 'Licenses'. At the top is a blue button labeled 'Licenses' with a downward arrow. Below it is a search box with a magnifying glass icon and the placeholder text 'Look-up or select'. The dropdown menu is open, showing a list of license terms: 'Licenses', 'License Terms', 'License Term - Accessibility compliance indicator', 'License Term - All rights reserved', 'License Term - Applicable Copyright Law', 'License Term - Archiving right', 'License Term - Archiving format', 'License Term - Archiving note', 'License Term - Authorized User Definition', 'License Term - Citation requirement detail', 'License Term - Clickwrap modification clause indic', and 'License Term - Completeness of Content clause ind'. Each option has a small downward arrow to its right.

All Titles: Simple Search

Use an **All Titles** to search the metadata that is shared across record formats. Results will include physical and electronic resources. Use this search if the format does not matter or if you are unsure of the resource's format. This search does not retrieve inventory.

Common Limiters include: Title, Keyword, MMS ID, ISBN, ISSN, Local Notes, and OCLC Control Number

Facets include: Material Type, Resource Type, Language, and Publication Year

All Titles: Simple Search

Limiters

The screenshot shows a search interface with a blue header bar containing 'All titles' and a dropdown menu. The dropdown menu is open, displaying a list of search criteria. The 'Keywords' option is highlighted. The background shows a search results page with a 'Status : All' filter.

- All titles ▾
- Title
- Keywords
- MMS ID
- Keywords
- Copyright Note
- Creator
- DOI - Digital Object Identifier
- Description
- Dewey Decimal Class Number
- Edition
- Government Document Number
- ISBN
- ISSN
- LC Call Number
- Local Notes
- MMS ID

Facets

The screenshot shows a search interface with a 'Facets' sidebar on the right. The sidebar is titled 'Facets' and has a double arrow icon. It lists several categories with their respective counts and a '+ More' link for each.

- Facets ‹‹
- Material Type** ▾
 - Book (223)
 - Journal (27)
 - Visual material (3)
- Resource Type** ▾
 - Book - Electronic (45)
 - Book - Physical (178)
 - Journal (Ceased pub... (4)
 - [+ More \(8\)](#)
- Language** ▾
 - English (252)
 - Japanese (1)
- Publication Year** ▾
 - 1904 - 1968 (57)
 - 1969 - 1976 (58)
 - 1977 - 2002 (61)
 - [+ More \(2\)](#)

All Titles: Advanced Search

Use an Advanced Search to take advantage of the multitude of limiters available.

Example Advanced Search:

Open Access Equals Yes AND Material Type Equals Book

All titles ▾ Zone: Institution Network Community ✕

Open Access ▾ Equals ▾ Yes ▾ + 📄 ✕

AND OR Material Type ▾ Equals ▾ Book ▾ + 📄 ✕

Clear form Search

Viewing Inventory

When conducting an **All Titles** search, the inventory for electronic resources lists the interface name, collection name, service type, active or inactive, and portfolio(s)

All Titles: Viewing Inventory

Conduct an All Titles search in the IZ and use the facets to limit results to electronic resources. Click on the Electronic tab to view the electronic inventory.

The screenshot displays the 'All Titles' search interface. At the top, a search bar contains 'All titles', 'Title', and 'psychology'. Below the search bar, the results are filtered by 'All Titles (1 - 20 of 312)'. The 'Resource Type' facet is expanded to show 'Journal - Electronic'. The 'Availability' facet is expanded to show 'Electronic (1)'. A table below the facets lists the electronic resources.

Interface Name	Collection Name	Service Type	Availability	Portfolio
EBSCOhost	EBSCOhost Academic Search Complete	Full Text	Active	View

1 👤 **Clinical psychology.**

Journal {Journal - Electronic} text; computer; or resource By American Psychological Association of Clinical Psychology. (Oxford, U.K. : Oxford University Press on behalf of the American Psychological Association D12.)

Subject: Clinical psychology--Periodicals. Psychology, Pathological--Periodicals. Psychotherapy--Periodicals. and others

Creation Date: 02/25/2012 17:26:51 EST

Modification Date: 06/20/2019 24:50:28 EDT

☰ Physical **● Electronic (1)** Digital Other details

Interface Name	Collection Name	Service Type	Availability	Portfolio
EBSCOhost	EBSCOhost Academic Search Complete	Full Text	● Active	View

Portfolio List



Collection Name: Open the Electronic Collection Editor

Service Type: Open the Electronic Service Editor

Availability: The green button and Active text indicates the portfolio is available in Primo

Portfolio: Open the Electronic Portfolio Editor

Portfolio List: Open a list of portfolios in the collection

Icons by Zone

Alma provides information using icons in search results

Icons in the Institution Zone

 [The making of British bioethics \[electronic resource\] / Duncan Wilson.](#)

An activated resource that is linked to the Community Zone

 [Chemistry \[electronic resource\] / overview by Keith B. Hutton.](#)

An deactivated resource that is linked to the Community Zone

 [Fluorous Chemistry \[electronic resource\] / edited by István T. Horváth.](#)

Activated and unliked resource

 [Educational psychology.](#)

Deactivated and unlinked resource

 [Video Conference Kit.](#)

Suppressed record

Icons in the Community Zone

EBSCOhost Ebooks

CZ record that is linked to the Institution Zone

Peer Reviewed

Peer Reviewed

Open Access

An Open Access resource

Find electronic resources activated by other SUNY campuses

Search the NZ to identify other electronic collections and portfolios activated by other campuses in SUNY. This information can be helpful when searching for a collection or portfolio to activate.

Find Electronic Resources Activated by Other SUNY Libraries

Conduct an **All Titles** search in the **NZ** using the **Advanced Search** function. The first search string should be as follows: **Is Linked Equals Yes**. Add additional search strings and use the facets to refine your search further.

The screenshot shows an advanced search interface with the following elements:

- Search Type:** A blue button labeled "All titles" with a downward arrow.
- Zone Selection:** Radio buttons for "Institution", "Network" (selected), and "Community".
- Search Criteria 1:** A row of three dropdown menus: "Is linked", "Equals", and "Yes".
- Search Criteria 2:** A row starting with "AND" and "OR" buttons, followed by dropdown menus for "Keywords" and "Contains Keywords", and a text input field containing "alexander street press".
- Actions:** Plus (+), copy, and close (X) icons are present to the right of each search criterion row.
- Buttons:** "Clear form" and "Search" buttons are located at the bottom right.

Find Electronic Resources Activated by Other SUNY Libraries

It's helpful to use the Facets to limit the results to electronic resources. In particular, you can use the Resource Type facet to limit to electronic book, electronic journal, or collection.




The image shows a facet menu with two main sections: 'Material Type' and 'Resource Type'. The 'Material Type' section includes 'Book (8363)', 'Computer file (1)', 'Journal (2)', and '+ More (2)'. The 'Resource Type' section includes 'Audio musical - Elect... (5)', 'Book - Electronic (8041)', 'Collection (322)', 'Journal - Electronic (1)', 'Other material - Elect... (1)', 'Other Serial - Electro... (1)', 'Projected medium... (274)', and 'Undefined (1)'. Three red arrows point to 'Book - Electronic (8041)', 'Collection (322)', and 'Journal - Electronic (1)'.

Facets <<

Material Type ▾


- Book (8363)
- Computer file (1)
- Journal (2)
- [+ More \(2\)](#)

Resource Type ▾

- Audio musical - Elect... (5)
-  Book - Electronic (8041)
-  Collection (322)
-  Journal - Electronic (1)
- Other material - Elect... (1)
- Other Serial - Electro... (1)
- Projected medium... (274)
- Undefined (1)
- [- Less](#)

Find Electronic Resources Activated by Other SUNY Libraries

The Held By tab will list the other SUNY campuses that have activated the collection or portfolio.

5  **Alexander Street Press Latino Literature** Edit Record Order ...

Book {Collection}

Creation Date: 06/08/2019 02:37:27 EDT

Modification Date: 01/26/2020 13:01:09 EST

Language: Multiple languages

MMS ID: 991058529838404801

Electronic Digital **Held by (5)** Other details

SUNY Fredonia SUNY Potsdam	SUNY Old Westbury SUNY Purchase	SUNY Oneonta
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Search for Electronic Collections and Portfolios in the Community Zone

When placing an order or activating a resource, it's important to select the correct record in the CZ for the desired resource.

Search for Electronic Resources in the CZ

Use the **Advanced Search**. Search by Material Type, Type of Electronic Collection (Database, Aggregator Package, or Selective Package), or Interface Name.

Electronic collection ▾ Zone: Institution Network Community ✕

Electronic Collection: **Electronic Collectio** ▾ Equals ▾ Selective package ▾ + 📄

Clear form Search

Electronic portfolios ▾ Zone: Institution Network Community ✕

Electronic Portfolio: **Material Type (Electr** ▾ Equals ▾ Journal ▾ + 📄

Clear form Search

Search for Electronic Resources in the CZ

Electronic collection ▾ Zone: Institution Network Community ✕

Electronic Collection Type ▾	Equals ▾	Selective package ▾	+ ☰ ✕	
AND OR	Material Type (Electronic Po ▾	Equals ▾	Journal ▾	+ ☰ ✕
AND OR	Interface Name ▾	Contains Keywords ▾	Wiley	+ ☰ ✕

[Clear form](#) [Search](#)

Search for Electronic Resources in the CZ

Narrow results further using the facets in the left menu.

Facets



Type



Selective package (163)

Interface



Wiley Online Library (162)

Wiley Online Library ... (1)

Electronic Collection Type

Journal Package (162) 

Mixed Material Pack... (1)

Search for Electronic Resources in the CZ

What to look for in selecting a record from the CZ:

- **Interface** and **Vendor** match the interface and vendor from which access is available
- **Service:** Full Text
- **Electronic Collection Type:** Selective Package, Aggregator Package, or Database
- For selective packages, the **portfolio list** matches or closely matches your access. Portfolios may have to be activated or deactivated to align directly with your license package.
- For portfolios with a material type of journal, check for the "**getFullTxt**" and **Available** to and from dates

Electronic Collection

3 **Wiley Online Library Hematology Backfiles**

Portfolio List (10)

Activate



Type: Selective package

Service: Full Text

Interface name: Wiley Online Library Hematology Backfiles

Linking Level: Journal

Creation Date: 11/12/2019 08:59:28 EST

Modification Date: 11/23/2019 19:31:02 EST

Collection ID:

61491000000001610

Electronic Portfolio with Material Type of Journal

7

[Vox sanguinis.](#)

Wiley Online Library Hematology Backfiles: getFullTxt

ISSN: 0042-9007

Available from 1956 until 1996

Electronic Material Type: Journal

Creation Date: 11/23/2019
20:54:58 EST

Modification Date: 11/23/2019
20:55:13 EST

Portfolio ID:
534910000000851570

Service ID:
62491000000001347

Collection ID:
61491000000001610

Activate

Order

