

ERM Training for Alma

Session 3:

Order and Activate One-time and Continuing
Electronic Resources

Electronic Collections

March 28, 2019

required roles:

- Electronic Inventory Operator
- Electronic Inventory Operator Extended
 - required for delete operations
- Repository Manager
- Purchasing Operator or Purchasing Manager
 - required to create and edit POs & POLs

today's session:

order & activate electronic collections

Database: collection does not have portfolios; service type is none; no activation required (example: ERIC, AGRICOLA, PsycTests, PsycINFO)

Aggregator Package: library has access to all portfolios in the package; activation required and includes all portfolios (example: CINAHL, Business Source, ProQuest Newsstand, ProQuest Central)

Selective Package: library has access to some, but not all, the portfolios; activation required and selection of portfolios to activate (example: Wiley Full Collection, SpringerLink Books, SAGE Journals)

Order & Activate an Electronic Collection
with the Resource Type of Database

the ordering process for all electronic collections will be the same:

- search the CZ by Electronic Collection for the resource
- select and order the desired resource
- create a POL

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

Electronic Collections (1 - 20 of 129) | archives of sexuality and gender

🏠 Institution 🌐 Network 👤 Community

Sort by : Rank ▾ [📄](#) [⚙️](#)

1 🏠 Archives of Sexuality and Gender : LGBTQ History and Culture Since 1940 [Activate](#) [Descriptive Record](#) [⋮](#)

Type: Database

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

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

Pay attention, though, to the resource type. The activation process is different across resource types in Alma.

Databases do not have a service or portfolios and are therefore the simplest resource types to activate.

activating a database:

Electronic Resource Activation Task List

Assigned to Me | Unassigned | Assigned to Others

1 - 20 of 22 | Title | Search | Change

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

<input type="checkbox"/>	MMS ID	Title	Status Date	Type	Status	Due Date	Expect Activat Date	PO Line Owner	Order Lin
<input type="checkbox"/>	995340750004833	Archives of Sexuality and Gender: LGBTQ History and Culture Since 1940	03/16/20...	Database	Chec...	04/15/2019	03/1...	Milne Library	POL-169

- View
- Edit
- Edit Resource**
- Test Access
- Activate
- Unsuppress
- Assign to
- Release assignment
- Done
- Delete
- View hidden

start in the Electronic Resources Activation Task List and use the ellipses to Edit Resource

in the Electronic Collection Editor, enable the proxy on the Additional Tab and then click Save

The screenshot shows the 'Electronic Collection Editor' interface. At the top right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted in red. Below the title bar, there are tabs for 'Electronic Collection Description', 'General', 'Additional', 'Notes', and 'History', with the 'Additional' tab highlighted in red. The main content area is titled 'Electronic Collection Information' and contains several input fields: 'Source', 'Source ID', 'Creator', 'Alternative title', 'Level URL' (with the value 'http://gdc.galegroup.com/gdc/artemis?p=AHSI&u='), and 'Level URL (override)'. Below these fields, there are radio buttons for 'Is free?' with 'Not Free' selected. The 'Proxy enabled' section has 'Yes' selected, and the 'Proxy selected' dropdown menu is set to 'Default (currently: EZPROXY)', both of which are highlighted in red. Other visible fields include 'Language', 'Category', and 'Additional'.

Electronic Collection Editor

Cancel Save

Electronic Collection Description General Additional Notes History

Electronic Collection Information

Source

Source ID

Creator

Alternative title

Level URL `http://gdc.galegroup.com/gdc/artemis?p=AHSI&u=`

Level URL (override)

Is free? Not Free Free

Proxy enabled No Yes

Proxy selected **Default (currently: EZPROXY)**

Language

Category

Additional

Back in the Electronic Resources Activation Task List, use the ellipses to Test Access

Electronic Resource Activation Task List

<input type="checkbox"/>	MMS ID	Title	Status Date	Type	Status	Due Date	Expect Activat Date	PO Line Owner	Order Line	Intereste Users	No	
1 <input type="checkbox"/>	995340750004833	Archives of Sexuality and Gender: LGBTQ History and Culture Since 1940	03/16/20...	Database	Chec...	04/15/2019	03/1...	Milne Library	POL-169			...
2 <input type="checkbox"/>	995340550304833	Baking Muffins	02/06/20...	Portfolio	Chec...	03/08/2019	02/0...	Milne Library	POL-135			
3 <input type="checkbox"/>	995339250104833	Cats /	01/21/20...	Portfolio	Chec...	02/20/2019	01/2...	Milne Library	POL-103			
4 <input type="checkbox"/>	995339250204833	Cats /	02/23/20...	Portfolio	Chec...	03/25/2019	02/2...	Milne Library	POL-102			
5 <input type="checkbox"/>	995340749604833	Chemistry /	02/25/20...	Portfolio	Chec...	03/28/2019	02/2...	Milne Library	POL-156			
6 <input type="checkbox"/>	995340749504833	Chemistry & biodiversity.	02/25/20...	Journal	Chec...	03/28/2019	02/2...	Milne Library	POL-157			
7 <input type="checkbox"/>	995341150304833	EBSCOhost American Antiquarian Society Historical Periodicals	03/04/20...	Aggregator package	Chec...	04/03/2019	-	-	-			

- View
- Edit
- Edit Resource
- Test Access**
- Activate
- Unsuppress
- Assign to
- Release assignment
- Done
- Delete
- View hidden

click on the link to test access

[< Online Services](#)

[Display in a new window](#)

Source: Archives of sexuality & gender.

Resource available at: [Archives of Sexuality and Gender: LGBTQ History and Culture Since 1940](#)





Sign In



English



Tools

[Explore Collections](#) [Term Frequency](#) [About](#)

[Gale Primary Sources](#) ▾



Archives of Sexuality & Gender

Search primary sources



[Advanced Search](#) ▸



Visualize Results

View search results on a graph to see trends over time for one or more terms.

[Go to Term Frequency](#)



Save Documents

Create a user account to save documents and tags.

[Sign Up](#) | [Sign In](#)



See What's Inside

Learn more about the Archives of Sexuality & Gender database.

[Read Overview](#)

Return to the Electronic Resources Activation Task List and use the ellipses to select Activate and then, Done.

Electronic Resource Activation Task List

<input type="checkbox"/>	MMS ID	▲ Title	↕ Status Date	↕ Type	Status	↕ Due Date	Expect Actival Date	PO Line Owner	Order Line	Intereste Users	No	
1 <input type="checkbox"/>	995340750004833	Archives of Sexuality and Gender: LGBTQ History and Culture Since 1940	03/16/20...	Database	Chec...	04/15/2019	03/1...	Milne Library	POL-169			...
2 <input type="checkbox"/>	995340550304833	Baking Muffins	02/06/20...	Portfolio	Chec...	03/08/2019	02/0...	Milne Library	POL-135			
3 <input type="checkbox"/>	995339250104833	Cats /	01/21/20...	Portfolio	Chec...	02/20/2019	01/2...	Milne Library	POL-103			
4 <input type="checkbox"/>	995339250204833	Cats /	02/23/20...	Portfolio	Chec...	03/25/2019	02/2...	Milne Library	POL-102			
5 <input type="checkbox"/>	995340749604833	Chemistry /	02/25/20...	Portfolio	Chec...	03/28/2019	02/2...	Milne Library	POL-156			
6 <input type="checkbox"/>	995340749504833	Chemistry & biodiversity.	02/25/20...	Journal	Chec...	03/28/2019	02/2...	Milne Library	POL-157			
7 <input type="checkbox"/>	995341150304833	EBSCOhost American Antiquarian Society Historical Periodicals	03/04/20...	Aggregator package	Chec...	04/03/2019	-	-	-			

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

Order & Activate an Electronic Collection
with the Resource Type of
Aggregator Package

start in the Electronic Resources Activation Task List and use the ellipses to select Activate

Electronic collection ▾ Keywords ▾ ⬆️ 🔍 Advanced ▾

Electronic Resource Activation Task List

Assigned to Me | Unassigned | Assigned to Others

1 - 1 of 1 | Title ▾ 🔍 Change

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

<input type="checkbox"/>	MMS ID	▲ Title	↕ Status Date	↕ Type	Status	↕ Due Date	Expect Activat Date	PO Line Owner	Order Lin	⋮
<input type="checkbox"/>	995343149904833	EBSCOhost CINAHL Complete	03/23/20...	Aggregator package	Chec...	04/22/2019	03/2...	Milne Library	POL-186	⋮

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

the Activation Wizard will be initiated

< Activation Wizard: Electronic Collection and Services Setup

1 ?

Cancel

Next

EBSCOhost CINAHL Complete

Type	Aggregator package
Number of portfolios	1395
Electronic Collection Level URL	https://www.ebscohost.com/nursing/products/cinahl-databases/cinahl-complete
Additional descriptive information	CINAHL complete.

Local Electronic Collection Information

Public name	<input type="text"/>	Level URL	<input type="text"/>
Additional descriptive information	<input type="text" value="CINAHL complete."/> X ☰		
Mark Bib as suppressed	<input checked="" type="checkbox"/>		
Electronic Collection Proxy Enabled	<input checked="" type="radio"/> No <input type="radio"/> Yes	Electronic Collection Proxy Selected	<input type="text"/>

EBSCOhost CINAHL Complete

Type	Aggregator package
Number of portfolios	1395
Electronic Collection Level URL	https://www.ebscohost.com/nursing/products/cinahl-databases/cinahl-complete
Additional descriptive information	CINAHL complete.

Local Electronic Collection Information

Public name	<input type="text"/>	Level URL	<input type="text"/>
Additional descriptive information	<input type="text" value="CINAHL complete."/> X ☰		
Mark Bib as suppressed	<input checked="" type="checkbox"/>		
Electronic Collection Proxy Enabled	<input checked="" type="radio"/> No <input type="radio"/> Yes	Electronic Collection Proxy Selected	<input type="text"/>

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

Level URL: Leave this field blank

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

Full Text Service



Activate this
electronic collection
service



Make service
available



Automatically
activate new
portfolios



Active from date



Active until date



Service public name

Service Public Note

Service
Authentication Note

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 this box because the resource type is Aggregator Package

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

1 2 3 ? Cancel Back Next

EBSCOhost CINAHL Complete

Type Aggregator package
 Number of portfolios 1395
 Electronic Collection Level URL https://www.ebscohost.com/nursing/products/cinahl-databases/cinahl-complete
 Additional descriptive information CINAHL 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 APL_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=XgvcbOQ8gwiiT6X0owGJYooo0eye9FddWZZZdgZR9TnsAthPMLcNJM5zrSfQ9hAqfUsbE~~Q3hEhz87cVPPA25km0b8Ky1yohNsn4KO2mQUw7jXemfO1QxogwCVsesmi9phFyZjQloE5~lp~uWv8WmLnLlytRTsiLrNjns1t~c8_&Key-Pair-Id=APKAJ5Y6AV4GI7A555NA

be sure to also enable the proxy
(located at the bottom of the Linking Information
page of the Activation Wizard) and click Next

Full Text Service - Proxy setup ▼

Proxy enabled No Yes

Proxy selected

EBSCOhost CINAHL Complete

Type	Aggregator package
Number of portfolios	1395
Electronic Collection Level URL	https://www.ebscohost.com/nursing/products/cinahl-databases/cinahl-complete
Additional descriptive information	CINAHL 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

Select “Activate All” for the Activation Type because the resource type is Aggregator Package and the subscribing library has access to all the portfolios in the package.
Click Next.

EBSCOhost CINAHL Complete

Type	Aggregator package
Number of portfolios	1395
Electronic Collection Level URL	https://www.ebscohost.com/nursing/products/cinahl-databases/cinahl-complete
Additional descriptive information	CINAHL complete.

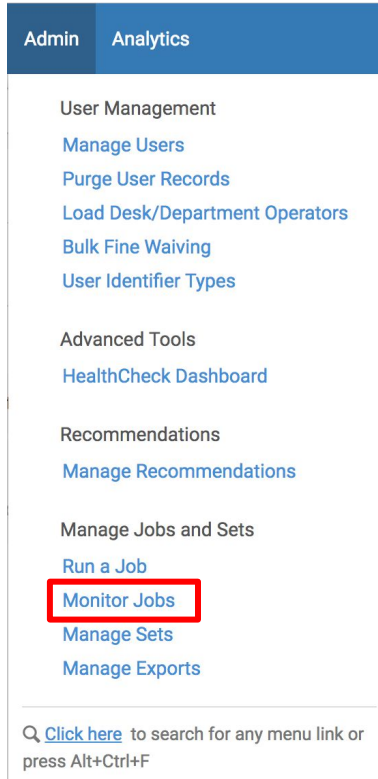
Activation Summary

	Services	Full Text
Number of portfolios to be activated		1395
Additional activation count (electronic collection + service)	2	

On the final page of the Activation Wizard, click Activate.

The activation will initiate a job to activate all the portfolios in the package.

To check the status of the job, go to
Admin → Manage Jobs & Sets → Monitor Jobs



Scheduled Running History

1 - 1 of 1 Job details

Refresh

Job Category : All

	↕ Name	↕ Job Category	↕ Creator	▼ Submit Date	↕ Start Date	Progress	↕ Status	
1	Electronic activation job - EBSCOhost CINAHL Complete	Repository	NUTH	03/23/2019 08:32:19 EDT	03/23/2019 08:32:30 EDT	0.0%	Running	<input type="button" value="⋮"/>

When the job is complete, return to the Electronic Resources Activation Task List (if you do not see the resource, check the Assigned to Me tab).

in the Electronic Resources Activation Task List, use the ellipses to select Test Access

Electronic Resource Activation Task List



<input type="checkbox"/>	MMS ID	Title	Status Date	Type	Status	Due Date	Expect Actual Date	PO Line Owner	Order Line	Intereste Users	No	
8 <input type="checkbox"/>	995343149904833	EBSCOhost CINAHL Complete	03/23/20...	Aggregator package	Chec...	04/22/2019	03/2...	Milne Library	POL-186			...
9 <input type="checkbox"/>	995342750204833	EBSCOhost Ebooks	03/16/20...	Selective package	Chec...	04/15/2019	03/1...	Milne Library	POL-171			View
1 <input type="checkbox"/>	995317228804833	EBSCOhost MEDLINE with Full Text	03/16/20...	Aggregator package	Chec...	04/15/2019	03/1...	Milne Library	POL-170			Edit
1 <input type="checkbox"/>	995343150304833	Games for health journal.	03/19/20...	Portfolio	Chec...	04/18/2019	03/1...	Milne Library	POL-172			Edit Resource
1 <input type="checkbox"/>	995335088804833	Infant mental health journal.	03/16/20...	Portfolio	Chec...	04/15/2019	03/1...	Milne Library	POL-168			Test Access
1 <input type="checkbox"/>	995335088804833	Infant mental health journal.	03/19/20...	Journal	Chec...	04/18/2019	03/1...	Milne Library	POL-174			Activate
1 <input type="checkbox"/>	995326228404833	Journal of biological chemistry.	03/19/20...	Journal	Chec...	04/18/2019	03/1...	Milne Library	POL-173			Unsuppress
1 <input type="checkbox"/>	995326228404833	Journal of biological chemistry.	03/19/20...	Journal	Chec...	04/18/2019	03/1...	Milne Library	POL-173			Assign to
1 <input type="checkbox"/>	995326228404833	Journal of biological chemistry.	03/19/20...	Journal	Chec...	04/18/2019	03/1...	Milne Library	POL-173			Release assignment
1 <input type="checkbox"/>	995326228404833	Journal of biological chemistry.	03/19/20...	Journal	Chec...	04/18/2019	03/1...	Milne Library	POL-173			Done
1 <input type="checkbox"/>	995326228404833	Journal of biological chemistry.	03/19/20...	Journal	Chec...	04/18/2019	03/1...	Milne Library	POL-173			Delete
1 <input type="checkbox"/>	995326228404833	Journal of biological chemistry.	03/19/20...	Journal	Chec...	04/18/2019	03/1...	Milne Library	POL-173			View hidden

use the ellipses next to each portfolio to select Test Access

< Portfolios List (1 - 20 of 1,395) Back Activate Execute

Portfolio List for: EBSCOhost CINAHL Complete

Select All Title 🔗 ⚙️

1	<input type="checkbox"/>	 AAACN viewpoint. Service: Full Text Available from 2004 Material Type: Journal Creation Date: 2019-03-23 08:40:29 Modification Date: 2019-03-23 08:40:29 Other details	Edit Portfolio Activate ⋮
2	<input type="checkbox"/>	 AACN advanced critical care. Identifier: 1559-7768	Edit Report To Ex Libris

View

Document Delivery

Order

Create E-Activation Task

Test access

Report To Ex Libris

click the link to Test Access

[< Online Services](#)


[Display in a new window](#)

Source: AACN viewpoint.

Full text available at: [EBSCOhost CINAHL Complete](#)
Available from 2004.



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(SUNY Geneseo does not license CINAHL so our test access page looks like this)

return to the Electronic Resources Activation Task List to complete the following steps:

- use the ellipses to select Activate
 - selecting Activate a second time makes the resources visible to the public
 - if prompted with a message to Edit Resource, click Cancel
 - if prompted with a message about unsuppressing the bib record, click Confirm
- finally, select Done to remove the resource from the Task List

Order & Activate an Electronic Collection with the Resource Type of Selective Package

find the resource in the Electronic Resources Activation Task List and use the ellipses to select Activate

Electronic Resource Activation Task List

Assigned to Me Unassigned Assigned to Others

1 - 1 of 1 Title [input] [search icon]

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

<input type="checkbox"/>	MMS ID	Title	Status Date	Type	Status	Due Date	Expect Actival Date	PO Line Owner	Order Lin	
1 <input type="checkbox"/>	995343149804833	Sage Premier 2017	03/23/20...	Selective package	Chec...	04/22/2019	03/2...	Milne Library	POL-188	...

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



the Activation Wizard will be initiated

The screenshot shows the 'Activation Wizard: Electronic Collection and Services Setup' interface. At the top, there is a navigation bar with a back arrow, the title 'Activation Wizard: Electronic Collection and Services Setup', a progress indicator with '1' in a blue circle and a question mark in a grey circle, and 'Cancel' and 'Next' buttons. Below this, the main content area is titled 'Sage Premier 2017' and contains the following information:

- Type:** Selective package
- Number of portfolios:** 1041
- Electronic Collection Level URL:** -
- Additional descriptive information:** Sage Journals.

Below this information is a section titled 'Local Electronic Collection Information' with a dropdown arrow. It contains several input fields and options:

- Public name:** An empty text input field.
- Level URL:** An empty text input field.
- Additional descriptive information:** A text input field containing 'Sage Journals.' with a blue 'X' icon and a menu icon to its right.
- Mark Bib as suppressed:** A checked checkbox.
- Electronic Collection Proxy Enabled:** Radio buttons for 'No' (selected) and 'Yes'.
- Electronic Collection Proxy Selected:** A dropdown menu.

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

Level URL: Leave this field blank

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

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: Do not check this box because the resource type is Selective Package. The subscribing library does not have access to all portfolios.

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**.

Full Text Service ▼

Activate this electronic collection service

Make service available

Automatically activate new portfolios

Active from date  Active until date 

Service public name

Service Public Note

Service Authentication Note

Sage Premier 2017

Type Selective package
Number of portfolios 1041
Electronic Collection Level -
URL
Additional descriptive information Sage Journals.

Full Text Service - Linking Parameters

Parameter Name	Value
1 SHIBBOLETH	<input type="text"/>

Full Text Service - Proxy setup

Proxy enabled No Yes

Proxy selected

Default (currently: EZPROXY)

The Linking Parameters fields are specific to the vendor, and the inputted information is specific to the library.

Be sure to enable the proxy, then click Next.

This collection is a Selective Package, which means the subscribing library only has access to some of the portfolios in the package. For this reason, you'll need to activate the electronic collection but select portfolios to activate (as opposed to an Aggregator Package in which all the portfolios can be activated without selection).

< Activation Wizard: Select Activation Method

Cancel

Back

Next



Sage Premier 2017

Type	Selective package
Number of portfolios	1041
Electronic Collection Level	-
URL	
Additional descriptive information	Sage Journals.

- 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

upload an Excel file with selected portfolios

Activation Wizard: File Upload

1 2 3 4 5 Cancel Back Next

Bibliographic

Select catalog Institution Network

Select File

File *

Sage_Premier_2017_portfolio...
(1.37 MB)

Sage_Premier_2017_portfolios.xls

Select Action

Add local portfolios

Select Validation Policy

Validate online

Validate offline - Recommended for large files

Select "Institution"
for the catalog

"Validate Online"
unless using a very
large file.

Click Next.

**See slides
44 - 46
regarding
the Excel file**

Once the file is uploaded, you'll see this confirmation page:

< Activation Wizard: Activation Summary



Sage Premier 2017

Type	Selective package
Number of portfolios	1041
Electronic Collection Level URL	-
Additional descriptive information	Sage Journals.

Activation Summary

Services	Full Text
Additional activation count (electronic collection + service)	2
Portfolio activation	1041 portfolios will be activated out of 1041 records in file

Information and warnings

[Download Excel file to view information and warnings](#)

It's likely that not all the portfolios will activate. Download the Excel file to see which portfolios did not activate and why. You'll have to manually activate those portfolios as local collections.

click Activate to initiate a job to activate all selected portfolios

< Activation Wizard: Activation Summary



Sage Premier 2017

Type	Selective package
Number of portfolios	1041
Electronic Collection Level	-
URL	
Additional descriptive information	Sage Journals.

Activation Summary

Services	Full Text
Additional activation count (electronic collection + service)	2
Portfolio activation	1041 portfolios will be activated out of 1041 records in file

Information and warnings

[Download Excel file to view information and warnings](#)

check the status of the job
when the job is complete, return
to the Electronic Resources
Activation Task List

Admin Analytics

- User Management
 - Manage Users
 - Purge User Records
 - Load Desk/Department Operators
 - Bulk Fine Waiving
 - User Identifier Types
- Advanced Tools
 - HealthCheck Dashboard
- Recommendations
 - Manage Recommendations
- Manage Jobs and Sets
 - Run a Job
 - ★ Monitor Jobs
 - Manage Sets
 - Manage Exports

Monitor Jobs

Scheduled Running History

1 - 1 of 1 Job details [search]

Job Category : All

Name	Job Category	Creator	Submit Date	Start Date	Progress	Status	
1 Electronic activation job - Sage Premier 2017	Repository	NUTH [user icon]	03/23/2019 17:26:27 EDT	03/23/2019 17:26:37 EDT	N/A	Running	[more]

Refresh [share] [settings]

Back

in the electronic resources activation task list, use the ellipses to Test Access

Electronic Resource Activation Task List

Assigned to Me

Unassigned

Assigned to Others

1 - 1 of 1

Title



Change

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

<input type="checkbox"/>	MMS ID	Title	Status Date	Type	Status	Due Date	Expect Actival Date	PO Line Owner	Order Lin	
1 <input type="checkbox"/>	995343149804833	Sage Premier 2017	03/23/20...	Selective package	Chec...	04/22/2019	03/2...	Milne Library	POL-188	...

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

Portfolio List for: Sage Premier 2017

Select All

Title ▾



1 **AADE in practice.**

Identifier: 2325-1603

Service: Full Text

Available from 2013 volume: 1 issue: 1

Material Type: Journal

Creation Date: 2019-03-23 17:28:37

Modification Date: 2019-03-23 17:28:37

[Other details](#)

Edit Portfolio

Activate



View

Document Delivery

Order

Create E-Activation Task

Test access

Report To Ex Libris

2 **AAOHN journal : official journal of the American Association of Occupational Health Nurses.**

Identifier: 0801-0160

Edit Portfolio

Activate



use the ellipses next to each portfolio to
select Test Access

click the link to Test Access

[← Online Services](#)

[Display in a new window](#)

Source: AADE in practice. [2325-1603] [2325-1611]

Full text available at: [Sage Premier 2017](#)

Available from 2013 volume: 1 issue: 1.





AADE in Practice



Journal Indexing & Metrics

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[Subscribe](#)

All Issues - AADE in Practice

January 2013 - March 2019

Select an issue

Select Decade ▾

Select Volume ▾

Select Issue ▾

[View](#)



return to the Electronic Resources Activation Task List to complete the following steps:

- use the ellipses to select Activate
 - selecting Activate a second time makes the resources visible to the public
 - if prompted with a message to Edit Resource, click Cancel
 - if prompted with a message about unsuppressing the bib record, click Confirm
- finally, select Done to remove the resource from the Task List

Pework to Activating a Selective Package

If selecting portfolios from an Excel file, you'll need to complete the following steps before activating the collection:

- download an Excel file of all the portfolios in the collection from the CZ
- review the file and delete the rows of any portfolios you do not wish to activate
- save the file using the same format and file name

Electronic collection ▾

Keywords ▾

sage journals



Advanced ▾

< Electronic Collections (1 - 20 of 1,569) | sage journals

Institution

Network

Community

Sort by : Rank ▾



1 Sage Premier 2017

Type: Selective package

Service: Full Text

Interface name: SAGE

Linking Level: Article

Creation Date: 2016-12-20 19:56:55

Modification Date: 2016-12-20 20:41:45

Portfolio List (1041)

Activate



2 SAGE Complete

Portfolio List (1481)

Activate



Cancel

Localize selected

Portfolio list for: Sage Premier 2017

Select All

Title ▾



1 **AADE in practice.**

Available from 2013 volume: 1 issue: 1.

Service: Full Text

Identifier: 2325-1603

Creation Date: 2017-01-01
04:28:53

Modification Date: 2017-01-01
04:28:53

Activate

Extended Export

Excel (current view)

2 **AAOHN journal : official journal of the American Association of Occupational Health Nurses.**

Available from 1999 volume: 47 issue: 1 until 2011
volume: 59 issue: 12.

Service: Full Text

Identifier: 0891-0162

Creation Date: 2016-12-20
20:09:17

Modification Date: 2017-09-02
07:20:10

Activate

Order



3 **Abstracts in anthropology.**

Available from 1999 volume: 38 issue: 1.

Service: Full Text

Identifier: 0001-3455

Creation Date: 2017-01-01
04:28:52

Modification Date: 2017-01-01
04:28:52

Activate

Order



1 of 53



Add a Local Electronic Collection

before adding a local collection, you'll need to follow the same pre-work steps as activating a selective portfolio

See slides 44 through 46

[Cataloging](#)[Open Metadata Editor](#)[Search External Resources](#)[Browse Bibliographic Headings](#)[Browse Shelf Listing](#)[Authority Control Task List](#)[Reminders](#)[Create Inventory](#)[Add Local Electronic Collection](#)[Add Local Portfolio](#)[Add Physical Item](#)[Add Digital Representation](#)[Manage Inventory](#)[Manage Collections](#)[Community Zone Updates Task List](#)[Manage Electronic Resource Activation](#)[Network Harvesting Report List](#)[Shelf Report](#)[Import](#)[Import](#)[Upload Single Record From File](#)[Monitor and View Imports](#)[Resolve Import Issues](#)[Manage Import Profiles](#)[Advanced Tools](#)[Overlap and Collection Analysis](#)[Duplicate Title Analysis](#)[Manage Deleted Repository](#)[Restore Jobs](#)[Digital Uploader](#)[Publishing](#)[Publishing Profiles](#)

Resources →


Create Inventory →

Add Local Electronic Collection

In the Electronic Collection Editor, add a Public Name and select “Selective Package” as the Collection Type, “Full Text” as the Service Type, and the Library.

Optionally add a Description and Internal Description


Electronic Collection Editor [Save and continue](#)


 Public name *


Public name (override)

Description

Internal description

 Collection type

 Service type

 Library X ☰ ↺

In the Activation tab of the Electronic Service Editor, set the Service Activation Status as “Available” and leave all other fields blank.

< Electronic Service Editor

Cancel

Save

Collection name SUNY ScienceDirect

Collection ID 6126079570004833

Service type Full Text

Service ID 6226079560004833

[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 Service Description tab, verify the Service Type as Full Text and add optional public notes

< Electronic Service Editor

Cancel

Save

Collection name SUNY ScienceDirect

Collection ID 6126079570004833

Service type Full Text

Service ID 6226079560004833

[View all services](#)



Activation

Service Description

Linking

Portfolios

Notes

History

Service type

Full Text




Public description

Internal description

Public description
(override)

In the Linking tab, add the Parser (service level), Service parser parameters, select Parser Parameters as the URL type, and enable the proxy.

Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 Museum management and curatorship. Museum management and curatorship (Online) Butterworth Scientific Guildford, U.K. : Vol. 9, issue 1 (Mar. 1990)- [1872-9185]

Collection name	SUNY ScienceDirect	Collection ID	6126079570004833	View all the collection's...
Service type	Full Text	Service ID	6226079560004833	View all the collection's...
Bib material type	Journal	Portfolio ID	5326128740004833	

General Linking Coverage Acquisition Notes Related Portfolios History

Parser (service level) ELSEVIER::SCIENCE_DIRECT

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

Parser parameters (override)

parser parameters -

URL type Static URL Dynamic URL Parser Parameters

Proxy enabled No Yes

Proxy selected Default (currently: EZPROXY)

Test access

In the Portfolios tab, select Load Portfolios

< Electronic Service Editor

Cancel

Save

Collection name SUNY ScienceDirect

Collection ID 6126079570004833



Service type Full Text

Service ID 6226079560004833

[View all services](#)

Activation

Service Description

Linking

Portfolios

Notes

History

ISBN ▾



[Move Set of Portfolios](#)

[Activate/Deactivate ▾](#)

Load Portfolios

[+ Add ▾](#)

[- Delete Selected](#)

▼ Status : All ▾ CZ Linking : All ▾

Upload the Excel file which you've already modified to reflect the portfolios you wish to activate

Activation Wizard: File Upload

1 2 Cancel Next

SUNY ScienceDirect

Bibliographic

Select catalog Institution Network

Select File

File *

Test_SUNY_SD_3_19.xls (3.41 MB)

Test_SUNY_SD_3_19.xls

Select Loading Policy

Loading Policy Type Complete Incremental

Select "Institution" as the catalog

Select "Complete" as the Loading Policy Type

Select “Add Local Portfolios” as the Select Action and “Validate Online.” Click Next.

< Activation Wizard: File Upload

1

2

Cancel

Next

Test_SUNY_SD_3_19.xls

Select Loading Policy

Loading Policy Type Complete Incremental

Select Action

Add local portfolios

Update portfolios

Delete portfolios

Select Validation Policy

Validate online

Validate offline - Recommended for large files

Activation Wizard: Activation Summary

< Activation Wizard: Activation Summary

1 — 2

Cancel

Back

Load

SUNY ScienceDirect

Type Selective package
Number of portfolios 0
Electronic Collection Level -
URL -
Additional descriptive information -

Activation Summary

Services	Full Text
Portfolio activation	25 portfolios will be activated out of 29 records in file
Number of MMS records to be created	0

It's likely that not all the portfolios will activate. Download the Excel file to see which portfolios did not activate and why. You'll have to manually activate those portfolios as local collections.

Click Load.

Information and warnings

[Download Excel file to view information and warnings](#)

A job will be initiated to activate all loaded portfolios.
Back in the Electronic Service Editor, click Save.

The screenshot displays the 'Electronic Service Editor' interface. At the top right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red rectangular border. Below the header, a light blue bar contains the following information: 'Collection name' SUNY ScienceDirect, 'Collection ID' 6126079570004833, 'Service type' Full Text, and 'Service ID' 6226079560004833. A 'View all services' link and an information icon are also present. Below this bar is a tabbed navigation menu with 'Activation', 'Service Description', 'Linking', 'Portfolios', 'Notes', and 'History'. The 'Portfolios' tab is currently selected. Underneath the tabs is a search bar with 'ISBN' and a search icon. To the right of the search bar are several action buttons: 'Move Set of Portfolios', 'Activate/Deactivate', 'Load Portfolios', '+ Add', and '- Delete Selected'. At the bottom, there are two dropdown menus: 'Status: All' and 'CZ Linking: All'.

In the Electronic Collection Editor, enable the proxy and click Save.

Electronic Collection Editor Cancel Save

Collection ID 6126079570004833

Electronic Collection Description General Additional Notes History

Electronic Collection Information

Source

Source ID

Creator

Alternative title

Level URL

Level URL (override)

Is free? Not Free Free

Proxy enabled No Yes

Proxy selected **Default (currently: EZPROXY)**

Language

Category

Once the job is complete, search the IZ to find the local collection and verify that access is available. Click on the Portfolio List to Test Access to each portfolio.

The screenshot displays a search interface for 'SUNY ScienceDirect'. At the top, there is a search bar with the text 'SUNY ScienceDirect' and a search icon. Below the search bar, the results are categorized under 'Electronic Collections'. The first result is 'SUNY ScienceDirect', which is highlighted in yellow. To the right of this result, a button labeled 'Portfolio List (25)' is highlighted with a red box. Below the main title of the result, the text 'Type: Selective package' is visible. A red box highlights the text 'Services: Full Text (Available)'. Below this, the 'Creation Date' is listed as '2019-03-23 17:49:16' and the 'Modification Date' as '2019-03-23 18:12:49'. At the bottom of the result card, there is a link for 'Other details'. On the right side of the result card, there are buttons for 'Edit Collection' and a three-dot menu icon.

Electronic collection ▾ Keywords ▾ SUNY ScienceDirect X 🏠 🔍 Advanced ▾

Electronic Collections | SUNY ScienceDirect Save Query

🏠 Institution 🌐 Network 👤 Community

Sort by : Rank ▾ 🔄 ⚙️

1 🏠 **SUNY ScienceDirect**

Type: Selective package

Services: Full Text (Available)

Creation Date: 2019-03-23 17:49:16

Modification Date: 2019-03-23 18:12:49

[Other details](#)

Portfolio List (25) Edit Collection ⋮

Use the ellipses to select Test Access

< Portfolio List for SUNY ScienceDirect (1 - 20 of 25)

Activate

Deactivate

Back

Select All



More actions

1 [Journal of substance abuse.](#)

SUNY ScienceDirect: getFullTxt

Available from 12/01/1995 until 12/31/2001.

[Other details](#)

Edit Portfolio

Order



View

Create E-Activation Task

Test access

Delete

Move

Report To Ex Libris

Deactivate

Display in Discovery

2 [Museum management and curatorship.](#)

SUNY ScienceDirect: getFullTxt

Available from 03/01/1995 until 12/31/2006.

[Other details](#)

Peer Reviewed

Click the link to Test Access

< Online Services

[Display in a new window](#)

Source: Journal of substance abuse. [0899-3289] [1873-6491]

Full text available at: [SUNY ScienceDirect](#) 

Available from 12/01/1995 until 12/31/2001.



Create account

Sign in

Keywords

Author name

Museum Management and C

Volume

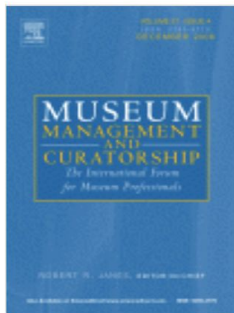
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