

# Alma Essentials: Electronic Resource Management

## Training Materials

- [Managing Electronic Resources](#)
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## Hands-on Exercises

*Roles needed for these exercises: Electronic Inventory Operator, CDI Inventory Operator*

Using your sandbox, **sign in as AlmaUser01** (or any account with the roles indicated above) and complete the following exercises. For these exercises, you may choose to either use the initial prompt to complete the activity on your own, or if you prefer, follow the step-by-step instructions.

### Exercise #1: Activate an Electronic Collection from the Community Zone

1. In the persistent search box, perform an **Electronic Collection** search in the CZ for a collection not yet activated in your institution.
  - a. For example, perform an **Electronic Collection Advanced Search** with the criteria **Electronic Collection Name contains keywords ProQuest Historical Newspapers**. Ensure the Zone is set to **Community**.
2. Click the row actions menu (ellipsis) for any collection that is not yet activated, then click **Activate**.
  - a. Note: if your institution creates Purchase Order Lines for electronic resources (by clicking Order), activation should instead be performed via Resources > Manage Inventory > Manage Electronic Resource Activation.
3. In the **Activation Wizard: Electronic Collection and Services Setup** screen:
  - a. **Local Electronic Collection Information:**
    - i. Check the box for **Mark Bib as suppressed** to suppress collection-level bib discovery.
    - ii. Set **Electronic Collection Proxy Enabled** to **No**.
  - b. **Central Discovery Index Information:**
    - i. **We subscribe to only some titles in this collection:** set this to **No** for an aggregator package.

- ii. Do not check the box for Do not show as Full Text available in CDI even if active in Alma.
- c. **Full Text Service:**
  - i. **Activate this electronic collection service:** check this box to create the service and so you can add portfolios.
  - ii. **Make service available:** check this box to make the service available to users in discovery. If you do not make the service available now, you can edit the service later to make it available for patrons.
  - iii. **Automatically activate new portfolios:** check this box for an aggregator package.
- d. Click **Next**.
- 4. In the **Activation Wizard: Linking Information** screen:
  - e. Enter any **Linking parameters** that the vendor requires (for example, enter a CLIENTID for ProQuest resources).
  - a. Enable proxy if necessary for access to the resource and select the appropriate proxy.
  - f. Click **Next**.
- 5. In the **Activation Wizard: Select Activation Method** screen:
  - g. Choose the appropriate activation type for the collection. Choose **Activate all** for an aggregator package.
- 6. Click **Next**.
- 7. Review the summary and click **Activate**.
- 8. A job is submitted to perform the activation process. Once the job has completed, use the persistent search box to search for the electronic collection in the Institution Zone.
- 9. The electronic collection should show a blue icon with two people, indicating that the collection is active and linked to the Community Zone.

## Exercise #2: Activate an Electronic Portfolio from the Community Zone

Three ways to perform the activation are described below. Note that if your institution creates Purchase Order Lines for electronic resources, activation should instead be performed via Resources > Manage Inventory > Manage Electronic Resource Activation.

1. From an Electronic Portfolios search:
  - a. In the persistent search box, perform an **Electronic Portfolios** search in the Community Zone.
  - b. Use advanced search criteria and/or facets to limit the results as needed.
  - c. On the desired portfolio, click **Linking Information** to preview the access URL for the resource.
  - d. Click **Activate** to activate the desired portfolio.
  - e. Choose a particular Library for the resource (or leave the dropdown blank), then click **Activate**.

2. From an Electronic Collection search:
  - a. In the persistent search box, perform an **Electronic Collection** search in the Community Zone.
  - b. Locate the electronic collection that contains the portfolio you would like to activate.
  - c. Click **Portfolio List**.
  - d. Locate the desired portfolio, using facets or the secondary search box to limit the results as needed.
  - e. On the desired portfolio, click **Linking Information** to preview the access URL for the resource.
  - f. Click **Activate** to activate the desired portfolio.
  - g. Choose a particular Library for the resource (or leave the dropdown blank), then click **Activate**.
  
3. From an All Titles search:
  - a. In the persistent search box, perform an **All Titles** search in the Community Zone.
  - b. Locate the bibliographic record for the title you would like to activate.
  - c. Click **Portfolio List**.
  - d. Locate the desired portfolio, using facets or the secondary search box to limit the results as needed.
  - e. On the desired portfolio, click **Linking Information** to preview the access URL for the resource.
  - f. Click **Activate** to activate the desired portfolio.
  - g. Choose a particular Library for the resource (or leave the dropdown blank), then click **Activate**.

### Exercise #3: Activate a Community Zone portfolio in an existing selective package

1. In the persistent search box, perform an **Electronic Collection** search for a selective package in your Institution Zone.
  - a. For example, perform an **Electronic Collection Advanced Search** with the criteria **Electronic Collection Type equals Selective package**. Ensure the Zone is set to **Institution**.
2. Click the row actions menu (ellipsis) for the desired collection, then click **Edit Full Text Portfolios**.
3. Click **Add**, then **Add Portfolios from Community**.
4. Check the box next to any desired portfolio(s), then click **Activate selected**.