



ERM-102: Order and Activate Collections

Exercises for Attendees

Note: Try these exercises in your Alma sandbox first, before doing the workflows in your Alma production environment, so that any mistakes you make won't affect your patrons using your discovery service.

Exercise #1: Order an electronic collection from the Community Zone

1. Ensure you have set your Alma Location to an acquisitions location.
2. In the persistent search box, search **Electronic Collection** in the CZ for a collection not yet activated in your institution.
3. Click the row action menu [...] to the right and then click **Order**.
4. In the **PO Line Owner and Type** screen:
 - a. **PO Line Type:** Electronic Collection - Subscription
 - b. **PO Line Owner:** choose library handling the ordering process
 - c. **Load from Template:** choose a template if one is created for your purposes.

The screenshot shows the "PO Line Owner and Type" screen in Alma. At the top, there is a back arrow and the title "PO Line Owner and Type". Below this, the collection details are displayed: "1 EBSCOhost Ebook Ebsco Eclassics Collection", "Type: Aggregator package", "Service: Full Text", "Creation Date: 01/02/2019", and "Modification Date: 08/27/2023". The "Description" field is labeled "Description *" and contains the text "EBSCOhost Ebook Ebsco Eclassics Collection". Below this is the "PO line type" field, labeled "PO line type *", which is a search box containing "Look-up or select" and a dropdown arrow. The "PO line owner" field, labeled "PO line owner *", is a dropdown menu currently showing "Recommended". The "Load from template" field, labeled "Load from template", is a list box with three options: "Electronic Collection - One Time", "Electronic Collection - Subscription", and "Other" with a right-pointing arrow.

5. On the **Purchase Order** screen:
 - a. **PO Line Information:** Select **Acquisition Method**; (**Purchase at Vendor System** if you are purchasing the item through the vendor's interface, or if you're just practicing this in your sandbox)

PO Line Information

CKB ID 61490000000000301	Sent date -	Source type Manual Entry
Acquisition method Purchase at Vendor System ▼	Additional PO line reference field <i>Enter Text Here</i>	<input type="checkbox"/> Manual packaging
Invoice status No invoice ▼	Associated PO lines <i>Select a value</i> ▼ ⋮	<input type="checkbox"/> Cancellation restriction
Material type Journal Package ▼		

- b. **Vendor Information:**
 - i. Enter **Material Supplier**, or the vendor that you are paying for the resource.
 - ii. Enter **Access Provider**, or the platform on which the content will be accessed, if different from Material Supplier.
 - iii. Enter values in **Expected activation days after ordering** or **Expected Activation Date** if your library intends to send a claim to your vendor after the date has passed.

Vendor Information

Material supplier* <i>Select a value</i> ▼ ⋮	Access provider <i>Select a value</i> ▼	Claiming grace period (days) 0
Expected activation <input checked="" type="radio"/> Days after ordering <input type="radio"/> Date	Vendor reference number <i>Enter number</i>	Reclaim interval (days) 0
<i>Enter days</i>	Vendor reference number type <i>Select a value</i> ▼	Note to vendor <i>Enter Text Here</i>
Activation due after ordering (days) 30	Vendor invoice number -	

- c. **Pricing and Funding:**
 - i. Enter the list price
 - ii. Choose the fund(s) being used from the dropdown or search for available funds
- d. **License:** attach if relevant

Activation Information

Rush

License
Select a value ▼ ⋮

e. **Renewal**

- i. Select **Renewal Date** to choose the date by which the material must be renewed with the vendor.
- ii. Select **Renewal Reminder Period** to decide how many days in advance you'd like to be notified of the renewal period.

Renewal Information

Renewal type: Manual renewal

Renewal reminder period (days): 0

Subscription from date: MM/dd/yyyy

Subscription to date: MM/dd/yyyy

Renewal date*: MM/dd/yyyy

Renewal note: Enter Text Here

f. **Reporting Codes:** Select reporting codes from the drop-down menus

Reporting Codes

1st reporting code: [drop-down]

2nd reporting code: [drop-down]

3rd reporting code: [drop-down]

4th reporting code: [drop-down]

5th reporting code: [drop-down]

6. Click **Order Now** to send the order immediately and create a PO Line. Copy the POL number from the popup message.

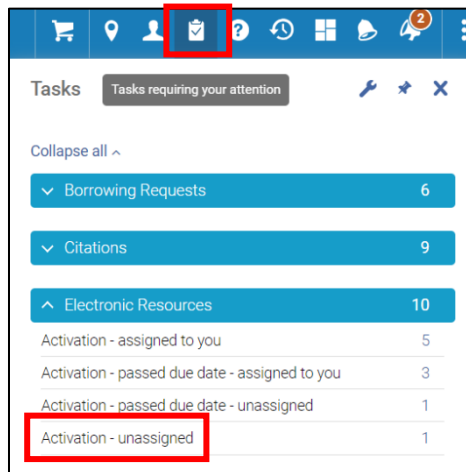
to Me Assign to Cancel Line **Order Now** Save and Start a Trial S

ook Ebsco Eclassics Collection

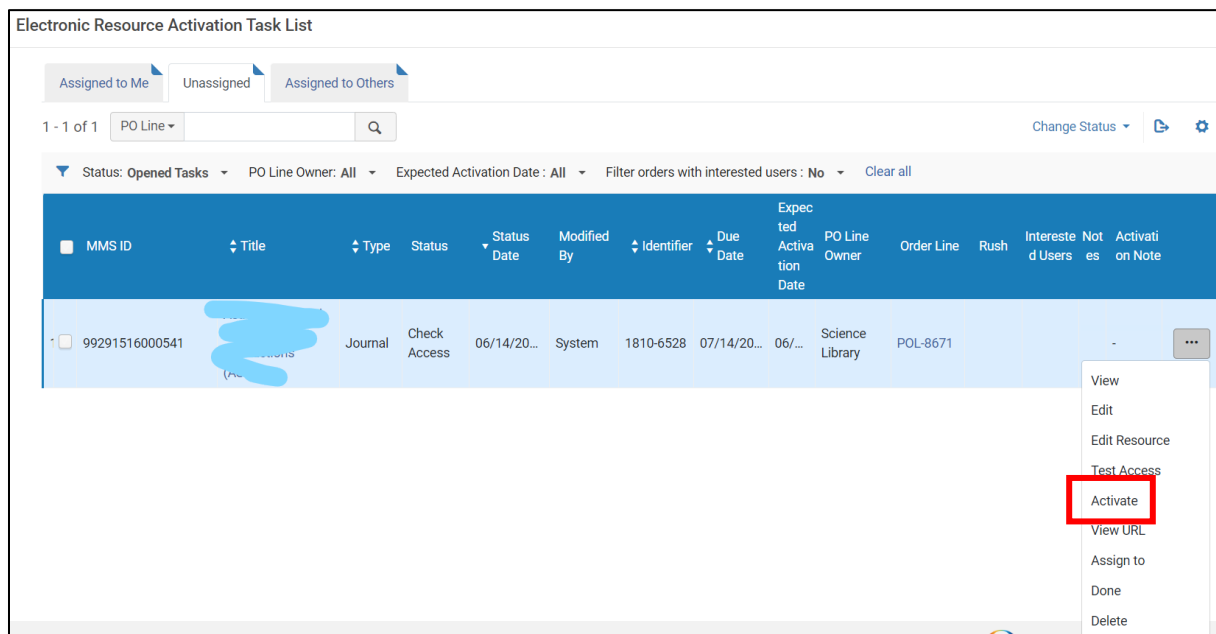
n Library

Exercise #2: Activate an electronic collection from the Community Zone

1. On the **Tasks** menu, click **Activation - unassigned**:



2. In the **Electronic Resource Activation Task List**, click on the ellipses beside your collection and note your options: here you can edit the resource, test access, assign the task, edit the task, or activate. Once access is confirmed, selected **Activate**.



3. In the **Activation Wizard**:
 - a. Select if you'd like to **Mark Bib as suppressed** to suppress collection-level bib discovery and decide if this bib should be proxied if displayed.
 - b. **Central Discovery Index Information**: select if you subscribe to some or all the titles in this collection.

- c. **Full Text Service:** select to activate the collection service, make it available to users in Primo VE, and to automatically activate new portfolios when appropriate.
 - d. Click **Next**.
4. **Linking Information:**
- e. Where appropriate enter **Linking parameters**; remember that Gale, ProQuest, EBSCO, etc. collections have different parameters to be entered.
 - f. Determine if the portfolios will be proxied and select the appropriate proxy.

Activation Wizard: Linking Information

ProQuest Historical Newspapers: Pennsylvania Collection

Type: Aggregator package
 Number of portfolios: 12
 Electronic Collection Level: -
 URL:
 Additional descriptive information: ProQuest Historical Newspapers: Pennsylvania Collection

Full Text Service - Linking Parameters

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

Full Text Service - Proxy setup

Proxy enabled: No Yes

Proxy selected:

5. **Activation Method:** Choose the appropriate activation type for the collection and click **Next**

Activation Wizard: Select Activation Method

ProQuest Historical Newspapers: Pennsylvania Collection

Type: Aggregator package
 Number of portfolios: 12
 Electronic Collection Level: -
 URL:
 Additional descriptive information: ProQuest Historical Newspapers: Pennsylvania Collection

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

- 6. Review the summary and click **Activate**.
- 7. Check under **Admin > Manage Jobs and Sets > Monitor Jobs** to view the progress of your activation task.

8. When activation is reviewed confirmed, go back to your task list, and click **Done** under the ellipses to complete your activation task.

The screenshot shows the 'Electronic Resource Activation Task List' interface. At the top, there are tabs for 'Assigned to Me', 'Unassigned', and 'Assigned to Others'. Below the tabs, there is a search bar with 'POL-8203' entered. A filter bar shows 'Status: Opened Tasks', 'PO Line Owner: All', 'Expected Activation Date: All', and 'Filter orders with interested users: No'. A table with columns for MMS ID, Title, Type, Status, Status Date, Modified By, Identifier, Due Date, Expect Activa Date, PO Line Owner, Order Line, and Run is displayed. The first row shows a task for 'ProQuest Historical Newspapers: Pennsylvania Collection' with a status of 'Check Access'. A context menu is open over the first row, with the 'Done' option highlighted in red.

MMS ID	Title	Type	Status	Status Date	Modified By	Identifier	Due Date	Expect Activa Date	PO Line Owner	Order Line	Run
1	ProQuest Historical Newspapers: Pennsylvania Collection	Aggre... packa...	Check Access	10/16/2...	System	-	11/15/2...	10/...	Music Library	POL-8203	...

Congratulations, you have completed the exercises for this session!