Alma Essentials – Acquisitions

Activating Electronic Resources

Hi! In this session we'll learn how to activate purchased electronic resources in order to make them available to the public; and show how to test access to activated resources. After purchasing an electronic resource, and once it has become available to you from the vendor, you must activate it, to make it available to the public .

To find your electronic resources that require activation, open your Task list, and under Electronic Resources go to one of the Activation options. This takes you to the Electronic Resource Activation Task List. You can also navigate here via Resources > Manage Electronic Resource Activation.

Here you can see a list of the titles requiring activation. They can be collections, portfolios, or books. You can search this list or filter it. By default, the tasks are unassigned, and found in the Unassigned tab. However, once you start working on a task it will be assigned to you. You can also assign a task to yourself or another user.

Several types of Electronic Resources can be activated. Let's first demonstrate activating an Electronic Collection. Find your collection, and click on its Options > Activate.

In step one of the Activation Wizard, you can enter collection-level metadata. By default, the value Mark Bib as Suppressed is checked. This means that the collection-level bib record will not be published to your discovery system. You can add a proxy at the collection-level if desired; but the proxy defined at this level will not apply to services or portfolios.

In this section you fill in information related to the Central Discovery Index, or CDI. CDI is a unified central index of electronic titles managed by Ex Libris. Here you manage how your Electronic Collections are discovered. If you only subscribe to some titles in this collection, select Yes here, to avoid displaying full text links for unsubscribed content. Do not show as Full Text available in CDI even if active in Alma. Select this option to suppress this collection when publishing holdings information to CDI. This is useful for open access content, so as not to overwhelm your search results.

In the Full Text Service section, enable Activate the electronic collection service if this collection has one or more services. The Make service available field is disabled by default. Ex Libris recommends making the service available only after completing the activation wizard and confirming access. You can Automatically activate new portfolios added to the collection in the future. This is useful for aggregate collections.

You can limit the start and end dates of the activation; otherwise, material is available indefinitely until manually deactivated.

The service's Public Name, Public Note, and Authentication Note can be added here, and will display to end users in your discovery system if the bib is published.

Click Next .

In step two of the wizard, you fill in linking information. A proxy defined here will apply to the service level and all portfolios for the collection .If the collection requires special parameters, like an LOC_ID or a collection ID based on the vendor’s requirements, the appropriate fields to fill in will appear here. Click Next to continue.

In step three of the wizard, there are three choices for Activation Type. You can either activate all the portfolios in this collection, activate select portfolios as specified in an uploaded Excel file, or manually activate select portfolios. In this example, we'll use the default of activating all portfolios.Click Next.

Review the Activation summary including the number of Portfolios to be activated, and click Activate. Alma will run a job to activate the portfolios.

Now let's test the access to our activated collection. Our collection is found in the Assigned to Me tab, and the status of the collection is Check Access. Click Options > Test Access. Here you will see the list of portfolios for this collection. If needed you can Activate or Deactivate the portfolio from here. To test the access for a portfolio, click Options > Test access. The ViewIt tab opens, which shows how the access links will appear to patrons in Primo. Click on a link to go to the full text service.

Having tested the access, let's go back to the Activation Task List and finish up the Activation task. Find the collection and Edit it. Update the Status to Access Confirmed. Save. If your collection is suppressed from discovery click Options > Unsuppress. This will make your collection discoverable to patrons.

Having completed all the necessary actions for the task, click Options > Done. The resource is removed from the Activation Task List. So much for activating Electronic Collections and their portfolios.

You can activate a standalone portfolio from the Activation Task List as well. For the desired portfolio Click Options > Activate. Confirm the activation. If needed, you can edit the portfolio to update linking information and the like. Save. And under Options you can Test Access or mark the task as Done.

Thanks for joining!