

NYU Libraries Alma Training Documentation: Adding a Local Electronic Collection

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Related Materials and Resources

- [Alma Documentation](#)
- [Alma Migration Guide: Training](#)

Who is this document for and what does it cover?

- **Intended Audience:** Technical Services staff
- This document describes how to add a local electronic collection to Alma

To get help, or provide feedback on this document

If you have questions or suggested edits please contact Ayse Kocoglu
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How to add a local electronic collection to Alma

1. **Prepare an Excel spreadsheet using the [template](#) provided by ExLibris listing the portfolio information for the local collection you want to add to Alma.** Fill in the following columns on the spreadsheet:
 - a. ISSN or ISBN (columns B-G). Enter as many as available
 - b. Title (column M)
 - c. Chronology and Enumeration information if it is a journal package (columns N-W)
 - d. Publication date if it is a book collection (column Z)
 - e. Parser Parameters in the format jkey=[parser parameter] or bkey=[parser parameter] (column BI). If the service parser of the

collection is known these are going to be the title IDs, if the service parser is not known and a Bulk::BULK parser is going to be used then these are going to be full URLs. See step 8 in this document for more information.

- 2. Navigate to the Resources menu and select 'Add Local Electronic Collection' under 'Create Inventory'.** This will open the 'Electronic Collection Editor' page.
- 3. Add a name for the collection in the 'Public name' field.**
- 4. Select the type of the collection you are adding and the Service type from the dropdown menus.**
- 5. Select the owning library from the dropdown menu and click 'Save and continue'.** This will open the 'Electronic Service Editor' page.
- 6. Select 'Available' for 'Service activation status' on the 'Activation' tab.** Leave all other fields blank.
- 7. Navigate to the 'Linking' tab.** 'Parser Parameters' is selected by default for the 'URL type'. Leave it as is.
- 8. Fill in the 'Parser' and 'Parser Parameters' fields with the platform specific values.** If the local collection you are going to create is on a platform with existing Community Zone collections you can copy these values from the 'Linking Information' of portfolios in one of these collections. If there is no existing Community Zone collection then use a Bulk::BULK Parser in which case the Parser Parameter will be the base URL.
- 9. Select a value for 'Service is free?': 'Not Free' or 'Free'.**

- 10. Select 'Yes' for 'Proxy enabled' if this is a paid collection and select the proxy server from the dropdown menu.**
- 11. Navigate to the 'Portfolios' tab and select 'Load Portfolios'.** This will open the 'File Upload' page from the 'Activation Wizard'.
- 12. Select the catalog you want the bibliographic records to be loaded into, Institution or Network.**
- 13. Select 'Portfolio Loader Format' for the format for the file to be uploaded and select the file you had prepared.**
- 14. Select 'Complete' for 'Loading Policy Type'**
- 15. Select 'Add local portfolios' for action and 'Validate online' for validation policy.**
- 16. Click 'Next'.** Activation Summary' page will open. Here you can see if all of the portfolios you intended to load have been validated or if there were any errors. The summary will indicate how many of the portfolios in the file will be activated. If the number is less than what was in the file you can download the Excel file from the 'Information and warnings' section to see which portfolios failed to validate and why.
- 17. Click 'Load'.** A job will run to activate the portfolios. If the number of portfolios is high it may take some time for the job to finish.
- 18. Click 'Save'.** 'Electronic Collection Editor' page will open. No fields need to be edited on this page. Click 'Save' again. Now you should be able to see the local collection you just created in the Institution tab. When the portfolio activation job completes, the 'house' icon next to the collection will turn blue, and the 'Portfolio List' menu will become available.

19. Click on the 'Portfolio List'. On the page that opens test access for a couple of random portfolios from their ellipsis menus.