**Alma Electronic Resources**

**Activating Aggregator Packages**

1. After assuring the resource isn’t already active for your library, in the **Community Zone**, locate the resource you wish to activate by conducting a search using the Electronic Collection limiter.



1. In the list of results locate the resource to be activated. Once found, click Activate.



Note:

If the resource has the institution () zone or network () zone next to it, it has already been activated.



1. The Activation Wizard displays. Depending on the responses to various fields of the wizard, the number of configuration screens may change as part of the wizard.
2. Electronic Collection and Services Setup
3. Local Electronic Collection Information – **typically no changes will be needed** in this section
* Public name
* Library
* Level URL
* Additional descriptive information – this information is automatically populated by Alma
* Mark Bib as suppressed – checked is the default. Leave this field as checked so the individual record for the collection (as a whole) will not be searchable
* Electronic Collection Proxy Enabled – no is the default. **Leave this field as no** as proxy information is handled on the portfolio level later in the wizard
* Electronic Collection Proxy Selected – **do not** select a proxy at this time – this will be done at the portfolio level later in the wizard.



1. Central Discover Index Information – **typically no changes will be needed** in this section
* **CDI Search activation status** – Active is the default. Leave this field set to Active so citations will be searchable in Primo.
* **We subscribe to only some titles in this collection** – Yes is the default. Leave this field set to Yes
* **Do not show as Full Text available in CDI even if active in Alma** – unchecked is the default.



1. Full Text Service
* **Activate this electronic collection service** – check in order to activate the collection
* **Make service available** – check to make the collection available
* **Automatically activate new portfolios** – for aggregators, check to enable the system to automatically add new portfolios (titles) as they become available.
* Active from/until dates – use these fields to indicate start/until dates when activating trials. The fields are not needed for collections that have been purchased.
* Service public name
* Service Public Note
* Service Authentication Note



1. Linking Information
* **Parameter Name/Value** – most collections won’t require this but if you are activating Gale (LOC\_ID) or ProQuest (ClientID) collections, you will need to provide them.
* **Full Text Service – Proxy setup** – check Yes to enable the proxy and select Default from the proxy selected dropdown.



1. Select Activation Method
* Activation type – select the applicable activation type. For aggregators, you will typically select activate all, as you’ve purchased the entire package.



1. Activation Summary
* A summary of what will be activated appears. Click Activate in order to begin the activation process.



1. Upon activating the collection, Alma will display a message if the activation was successful.

 

1. It is possible to monitor the job as well by going to Admin | Manage Jobs and Sets | Monitor Jobs



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If a job is still running, it will be in the ‘Running’ tab – once it is complete you will find it in the History tab.



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1. Once the collection is active for your library, there will be an institution zone icon indicating as such.

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1. In order to test that access is indeed working, search for a portfolio within the collection.



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On the results screen, using the ellipse button next to the title select Test Access. Alternatively, click Edit Portfolio.



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Edit portfolio will display the Electronic Portfolio Editor. Go to the Linking tab and click Test Access.



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