
How to manage Standalone portfolios in batch?

- **Product:** Alma
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Question

Portfolios were loaded as **Standalone** as part of **P2E data migration**. They have no Electronic Collection assigned to them. Is it possible to group the portfolios and, for example, delete the records in bulk, or link to Community Zone Collection?

Answer

The solution is to create a set of these standalone portfolios, group into a Local Electronic Collection, and manage all in bulk (e.g. update with Portfolio Loader, delete, link to Community Zone).

The steps are:

1. Create a Local Electronic Collection, from: Resources > **Add Local Electronic Collection**.
2. Create a **set** of these Standalone portfolios.
 1. For example, if the bib record's **856** has some identifier such as the ILS EZproxy string, or the Collection name - use an "**Electronic Portfolios**" advanced search on "Electronic Location and Note".
 2. Save as a set.
3. Find the Local Electronic Collection > Edit Service > in the "Portfolios" tab > Add > Add from Set.

At this point, it is possible to manage the Standalone portfolios as a group. For example, deactivate all or selected, use a Portfolio Loader to update URLs, or Link to Community Zone.

Additional Information

Online Help Links:

- Click here for more about "[Search Indexes](#)".
- More here about "[Adding a Set of Standalone Local Portfolios to a Local Electronic Collection](#)".
- Find out about "[Adding, Updating, or Removing Portfolio Information in Bulk Using an Excel File](#)".
- Finally! "[Linking a Local Electronic Collection to the Community Zone](#)"!

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