
How to merge Alma standalone portfolios with community zone collections?

- **Product:** Alma
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Desired Outcome Goal:

To merge a set of standalone local portfolios with a community zone collection

Procedure:

1. Create a set of these portfolios via advanced search and export to Excel via Tools > Excel
2. In the persistent search, choose electronic collections and search for the collection
3. Select "Edit Service"
4. Select the Portfolios Tab
5. Select Load Portfolios and choose the file. Also choose the option Add Portfolios. Select Next.
6. On the next screen, select load.

The portfolios have been added to the collection. Now they must be linked to the community zone.

1. Select "Link Local Portfolios to CZ"
2. To retain local bibliographic records, choose No under " Use the community bibliographic records"
3. Select Link

NOTE: when you link a portfolio to the Community Zone (CZ) using "Link Local Portfolios to Community" you can only link multiple portfolios at one time, rather than just a single portfolio (all or nothing).

You can link an individual portfolio to the CZ, but only if it's a standalone portfolio.

If it's attached to an electronic collection, you need to remove the portfolio from the collection, then Link to Community.

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