

Creating portfolios from bib records with multiple 856 belonging to different electronic collections

- **Product: Alma**

Problem

How do I import and create portfolios from 856 \$u in the bibliographic (bib) records when the bibs have multiple portfolios that belong to different electronic collections?

Solution

1. Create local collections and a dummy local collection, go to **Resources > Create Inventory > Add Local Electronic Collection**, see [Adding a Local Electronic Collection](#) in the Additional Information section for more details.
2. Create import profile to import bib records and create portfolios from 856\$u and attach them to the dummy local collection by choosing **Portfolio type: Part of an electronic collection**, see [Managing Import Profiles](#) in the Additional Information section for more details.

< Import Profile Details

Profile Details | Normalization & Validation | Match Profile | Set Management Tags | Inventory Information

Inventory Operations

Electronic Mixed Physical None

E-Book Mapping

Delete/deactivate portfolios

Use Community Zone portfolios

Portfolio type Standalone Part of an electronic collection

Electronic Collection *

Service *

Material type

Single portfolio Multiple portfolios

Create inventory only for new bibliographic records

Extract access URL from field subfield

Note: If standalone option is selected, only one portfolio will be created from the first 856 \$u.

3. Use Electronic portfolios option to search for imported portfolios based on shared information in bib/portfolio records, for example, if the portfolios have a shared domain URL. Click **Save Query** to create sets.
4. Move each set of portfolios into the appropriate local collection, see [Moving Portfolios to a Different Electronic Collection](#) in the Additional Information section for more details.

Move Portfolio

Set name *

Destination electronic collection *

Destination service type *

You are about to move service related portfolios according to the selected set, to the destination collection. Before you confirm the move please be aware of the following information:

1. Main and Additional PO lines - will move with the portfolios
2. Licenses - will move with the portfolios
3. PDAs - will move with the portfolios
4. Static URLs - will move with the portfolios
5. Dynamic URLs / Parser parameters - when moving, the linking might get broken and should be validated by the user upon process completion.
6. Portfolio level Group Settings - will move with the portfolio

Please note:

A CZ activated portfolio that moves from one collection to another will be localized and get unlinked from CZ.

Portfolios in the set which are not part of the source electronic service will be ignored and skipped.

Do you want to continue?

5. Search for the local collections and confirm that they contain the portfolios as expected.

Additional Information

Click here to learn more about:

[Adding a Local Electronic Collection](#)

[Managing Import Profiles](#)

[Moving Portfolios to a different Electronic Collection](#)

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