
How to Remove Portfolios from an Alma Local Electronic Collection

- **Product:** Alma
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Question

Is it possible to remove (not delete) portfolios from a local electronic collection?
I know that you can remove portfolios one by one, but I need to remove a group of portfolios in batch.

Resolution

It's not possible to remove portfolios from a local collection or set them back to a standalone status. The only options are to either mark them as 'inactive' or move them to a new collection. You can use the [Portfolio Loader](#) to update portfolios by first exporting, updating, and re-importing them using an Excel spreadsheet (see relevant articles in the "Additional Information" section below). Use the *Extended Export* feature from a portfolio list for your local collection for the excel export. You can activate/deactivate selected portfolios using this [Excel file](#). Keep in mind that the local collection is just a container for these portfolios. All of the linking information is at the Portfolio level, so the collection is just a grouping mechanism. Below are two approaches to doing this:

1. Mark the portfolios as 'inactive' in current local electronic collection

- a. Use the Alma Electronic Collection search to locate the local collection that has the portfolios you wish to remove.

From the Actions link (3 dots): *Edit Service* > *Portfolios tab* > *Export List: Excel (all fields)* to download the list of portfolios

- b. In the AVAILABILITY column indicate 'INACTIVE' for the portfolios you want to remove from this collection; save the Excel file.

- c. Return to the *Edit Service* > *Portfolios tab* > *Load Portfolios* and add the following parameters:

File: Select your updated Excel file for upload

Loading Policy Type: Incremental

Sect Action: Update portfolios

Select Validation Policy: Validate online (small number of portfolios to update) or Validate offline (large number of portfolios to update)

2. See [Moving a Set of Portfolios to a Different Electronic Collection](#)

Additional Information

[Moving a Set of Portfolios to a Different Electronic Collection](#)

[Managing Electronic Resources: Portfolio Loader](#)

[What is the difference between Remove and Delete for portfolios in the Electronic Service Editor](#)

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