How to Order and Activate Electronic Resources in Alma

**Activating ebooks that are not ordered (e.g., Salem Press books that include complementary e-access)**

Must activate on three levels: Collection (for example, Gale eBooks), Service, and Portfolio. Only need to activate the Collection and Service once. Enable proxy at Service level. Then you can add additional portfolios.

Search for the electronic collection and activate it.

Search for electronic portfolio in the CZ and find title from correct vendor. Click Activate.

**Ordering ebooks**

Find the correct electronic portfolio in the CZ and click “Order” in the row actions menu. Create the POL as usual. (“E-activation due after ordering (days)” and “E-activation due date”: seems to not matter what values are in these fields. The titles appear on the ERATL immediately after PO is sent anyway.) Package the POLs into a PO as usual. Titles should appear on the Electronic Resource Activation Task List (Resources🡪Manage inventory🡪Manage Electronic Resource Activation). There you need to activate, and can test the access, etc. Choose “done” which will set the POL to “waiting for invoice” status. Create the invoice and that will set the POL to “closed” status.