

# Creating a Portfolio

Tuesday, April 23, 2024 9:13 AM

(Documentation from: Jessica S. Scott, and Ex Libris)

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(Notes partially from Exlibris)

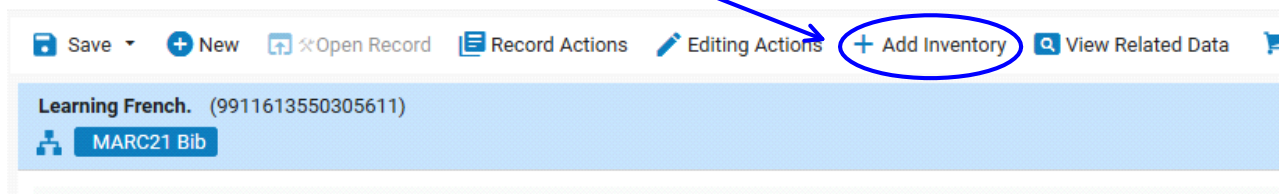
## [Sharing a Portfolio to the Network Zone](#)

These steps occur after an OCLC record is loaded or after a cataloger creates a record for the video.

1. Conduct an All Titles → Title search
  - a. If record is already opened MD Editor you can go straight to **+Add Inventory** in section below
2. Select Edit Record
3. Choose Record Actions and then Share with Network

## [Creating a Portfolio](#)

1. Search Electronic Portfolios for the Title you need.
  - a. If there is already a portfolio in the IZ (if so, there may also be an order attached), then select Edit Portfolio, and Link to a Collection. You can choose the appropriate collection where the title should be added.
  - b. If there is no portfolio, skip to step 2.
2. Search All Titles → Title to locate the appropriate record and choose Edit Record
  - a. (Will wait to see what PASCAL says about 856 40 field, but if added or imported with one follow steps below)
    - i. Delete any \$\$z or other coding that could be red or show up in Discovery.
  - b. Make sure the 856 40 field is \$\$u and the access URL or the proxy and the access URL
3. Select **Add Portfolio** at the top of the record under **+Add Inventory**



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4. The Portfolio form will appear where you can fill out the information depending on what type of eStreaming resource you have.
  - a. Descriptive Information
    - i. Most case you will be using the **Creation Type, Use existing title** check option, so all your information will be filled out from the record.
  - b. General Information
    - i. For Portfolio Type decide if is a **Standalone** or **Part of an electronic collection**. If part of a collection search for the collection.
      - i. If collection does not come up when you type it into the search box click on the select from list button on the right



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- ii. It will bring up a pop up window to search Electronic Collections. There you can search and select the collection.

# Electronic Collections

Electronic collection ▾ Title ▾ Kanopy X ⬆️ 🔍 Advanced ▾

1 - 1 of 1 ⚙️

- 1 **Kanopy Streaming Videos (Kanopy Streaming Service)**  
 Type: Selective package  
 Services: Full Text (Available from: 10/09/2020 until: 10/17/2023)  
 Interface name: Kanopy  
 Creation Date: 10/09/2020 14:04:45 EDT  
 Modification Date: 06/20/2021 10:11:37 EDT  
 Library: Cooper Library

Collection ID: 61177238480005612  
 MMS ID: 991014249425805612

Is

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iii. eResources that are not part of a collection and are owned by the library might go into the collections below

Collections	IDs	Material Type
Streaming Videos @ Clemson University Libraries	Collection ID: 61176887070005612 MMS ID: 991014512372305612	eVideos
eBook collection @ Clemson University Libraries: getFullTxt	Collection ID: 61215194130005612 MMS ID: 991014512372405612	eBooks
eJournal collection @ Clemson University	Collection ID: 61244364640005612 MMS ID: 991014648672405612	eJournals
Single Journals	Collection ID: 61130457030005612 MMS ID: 991014028187605612	eJournals

a.

b. Availability Dates

- i. If we only have the streaming service licensed for a certain amount of time, under the General tab in the Available from date and Available until date fields, fill in how long we have access, but if we bought it, leave it blank, or you can put in the date access begins if you have the information.

General **Linking** Coverage Acquisition Notes Related Portfolios History

Portfolio availability  Not Available  Available

Available from date  X 📅

Available until date  X 📅

Electronic material type  ▾

Activation date 08/23/2023

Expected activation date 09/13/2023

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c. Coverage Information

- i. At the moment Alma has not set up any fields that make the Availability Dates visible in Primo, so for eBooks and eVideos the Coverage tab fields are used
  - a. This is actually for putting coverage dates on serials, but for now it is being used to show and record licensing dates clearly.
    - 1) This will not be usable for eSerials

Coverage Information

DATE INFORMATION

From Year: 2021      Until Year: 2022

From Month: June      Until Month: June

From Day: 30      Until Day: 29

From Volume:      Until Volume:

From Issue:      Until Issue:

EMBARGO/ROLLING YEAR

Operator:      Number of Years:

Number of Months:

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d. Inventory and Linking Information

- i. Place access **URL** in the URL text box, this information will either be on the invoice, sent to you, or in the records 856 40 field
  - 1) Do not put the proxy in this field
- ii. Next at **Proxy enabled** check yes then by **Proxy selected** choose **Default (currently:Proxy)**
- iii. Make sure **Availability status** is checked as active
- iv. If we only have a license for access for a certain amount of time put the dates in the **Available from date** and **Available until date** boxes
- v. By **Electronic material type** choose the electronic type the resource is
  - 1) [Place Screen Shot here](#)

Inventory and Linking Information

Parser (service level) -

Service parser parameters -

Parser Parameters:

Or

URL: <https://clemons.kanopy.com/node/6081548>

Proxy enabled:  No  Yes      Proxy selected: Default ( currently: Proxy )

Availability status:  Inactive  Active

Available from date: 02/08/2023      Available until date: 02/07/2024

Electronic material type: Streaming Video

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- e. Go back to the top and click the button Save and Done in the Corner
- 5. Like other records in Alma you go to Record Actions at the top and choose to **Share with Network** then save and release record
- 6. Go back and search the record to check if it is done correctly
  - a. Click the drop down for Electronic to see the portfolio ,then go to the ellipses in the top right corner and click Display in Discovery

1 **Creating gender inclusive schools.** Edit Record Portfolio List ...

**Visual material (Projected medium - Electronic) two-dimensional moving image; computer; online resource** By Skurnik, Jonathan, ([San Francisco, California, USA] : New Day Films, 2016.)

**Language:** English **MMS ID:** 991012147979705612

**Record number:** (ScCleU)b38776431-01pascal\_clem

**Subject:** Gender identity--Study and teaching (Elementary)--California--Oakland. Inclusive education--Study and teaching (Elementary)--California--Oakland. School children--California--Oakland. and others

**Creation Date:** 05/19/2020 17:55:44 EDT

**Modification Date:** 07/01/2021 08:42:39 EDT

● Electronic (1)

Interface Name	Collection Name	Service Type	Availability	Portfolio
Kanopy	Kanopy Streaming Videos (Kanopy Streaming Service)	Full Text	● Active	<a href="#">View</a>

[Portfolio List](#)


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[Other details](#) >

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b. Make sure the record will appear correctly in Primo and that the link from the portfolio works.

VIDEO



**Creating gender inclusive schools.**  
Skurnik, Jonathan, film director.; New Day Films; Kanopy (Firm)  
2016

[Available Online >](#)

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Tools

REFWORKS ENDNOTE EASYBIB MENDELEY CITATION

EMAIL PERMALINK PRINT

View Online

**Full text availability**

[Kanopy Streaming Videos](#)  
Available from 06/30/2021 until 06/29/2022.

Links

[Link to resource >](#)  
[Display Source Record >](#)

Details

**Title** Creating gender inclusive schools.  
**Creator** [Skurnik, Jonathan, film director. >](#)  
[New Day Films >](#)  
[Kanopy \(Firm\) >](#)

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### Create Portfolio first

1. Resources > Create Inventory > Add Local Portfolio >
2. At **Creation Type** you can choose **Create new title** or **Use existing title**

## Descriptive Information

Creation Type  Create new title  Use existing title

Record Type  Continuing  One Time

Placement of new record  Network  Institution

Choose Title

Title \*

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