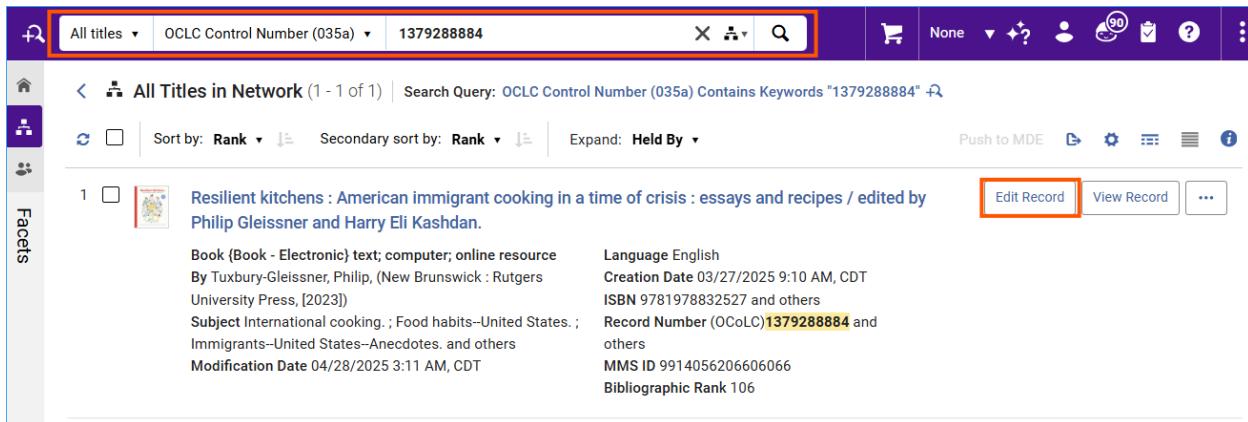


How to Add a Portfolio to a Bibliographic Record

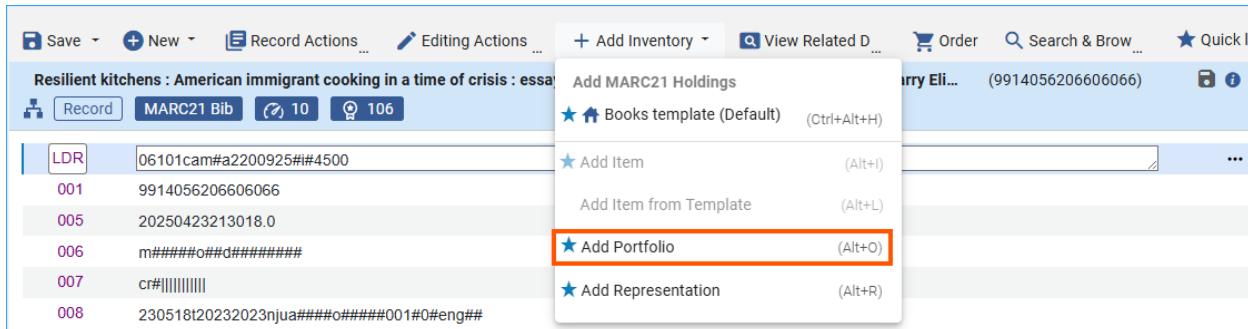
Find your record in Alma. This example is using a record from the Network Zone. When searching the Network Zone for bibliographic records, use an “All Titles” search.

Click the **Edit Record** button to open the record in the metadata editor.



The screenshot shows the Alma metadata editor interface. At the top, there is a search bar with dropdowns for 'All titles' and 'OCLC Control Number (035a)', and a text input field containing '1379288884'. Below the search bar are various navigation and search filters. The main content area displays a record for a book titled 'Resilient kitchens : American immigrant cooking in a time of crisis : essays and recipes / edited by Philip Gleissner and Harry Eli Kashdan.' The record includes details such as the author, publisher, subject, and various identifiers. At the bottom right of the record display, there are buttons for 'Edit Record', 'View Record', and '...'. The 'Edit Record' button is highlighted with a red box.

The metadata editor opens with the MARC record displaying. Click on the **+Add Inventory** menu and then select **Add Portfolio**.



The screenshot shows the 'Add Inventory' dropdown menu in the Alma metadata editor. The menu includes options like 'Add MARC21 Holdings', 'Books template (Default)', 'Add Item', 'Add Item from Template', 'Add Portfolio', and 'Add Representation'. The 'Add Portfolio' option is highlighted with a red box.

A form opens where you can add information to the portfolio. The top section of the form contains title information. The title from the MARC record appears by default. If you want to add a different title, click **Create new title** and fill in the information.

[!\[\]\(e226e06ff17b65f8950c4321f5e2cb41_img.jpg\) New Portfolio](#) [Save and Test Access](#) [Save and Create New](#) [Save and Create Duplicate](#) [Cancel](#) [Save and Done](#)

Descriptive Information

Creation Type Create new title Use existing title

Choose Title * [!\[\]\(8e2cfca36a20770c55f9710a5d9f4a02_img.jpg\)](#) [!\[\]\(d78c549529259e418b25695fc4d34f70_img.jpg\)](#)

Title

Author

Alternative Title 1 Alternative Title 2

ISSN e-ISSN

ISBN e-ISBN

Language [!\[\]\(f1282307117103dca767ed8659a389c8_img.jpg\)](#)

The next section of the portfolio work form is **General Information**. This is where you add the collection information for the portfolio. If the portfolio is standalone, you can leave it blank. To add collection information, click **Part of an electronic collection**. Use the **Electronic Collection** search box to find the correct collection. The form will then automatically fill in the service information.

General Information

Portfolio type Standalone Part of an electronic collection

Electronic Collection * [!\[\]\(c17a4ad420c346a13a379ec2c2f3d057_img.jpg\)](#) [!\[\]\(41f056cec2ea9da453f2d4b9c95284fa_img.jpg\)](#) [!\[\]\(12a79dbbf604ba7c31ab212ea78f3d62_img.jpg\)](#)

Service * [!\[\]\(a4c0e6a71283188729f66a69a953f4b5_img.jpg\)](#)

Library [!\[\]\(8bcb2da1a49862cdfda785db9124ba26_img.jpg\)](#)

COUNTER Platform [!\[\]\(2704ded3db5099edaa632f3d36fe3983_img.jpg\)](#)

The third section is **Coverage Information**. When adding portfolios for electronic journals, fill in coverage date information.

Coverage Information

DATE INFORMATION

From Year <input type="text" value="2002"/>	Until Year <input type="text"/>
From Month <input type="text" value="September"/>	Until Month <input type="text"/>
From Day <input type="text" value="01"/>	Until Day <input type="text"/>
From Volume <input type="text" value="1"/>	Until Volume <input type="text"/>
From Issue <input type="text" value="1"/>	Until Issue <input type="text"/>

EMBARGO/ROLLING YEAR

Operator <input type="text" value="Less than"/>	Number of Years <input type="text"/>
Number of Months <input type="text" value="24"/>	

- For the **Embargo / Rolling year**:

- Operator **Less than** will display as **Most recent 24 month(s) available**
- Operator **Greater than** will display as **Most recent 24 month(s) not available**

The fourth section is **Inventory and Linking Information**.

Inventory and Linking Information

Parser (service level)	-		
Service parser parameters	-		
Parser Parameters	<input type="text"/>		
Or			
URL	<input type="text" value="https://www.sage.com/document/isbn/9781978832541/original"/>		
Proxy enabled	<input checked="" type="radio"/> No <input type="radio"/> Yes	Proxy selected	<input type="text"/>
Availability status	<input type="radio"/> Inactive <input checked="" type="radio"/> Active	Available from date	<input type="text"/> <input type="button" value="Calendar"/>
Available until date	<input type="text"/> <input type="button" value="Calendar"/>		
Electronic material type	<input type="text" value="Book"/> <input type="button" value="Down"/>	Provenance	<input type="text"/> <input type="button" value="Down"/>

- Parser parameters- you can add them here if the portfolio's parser is *different* from the electronic collection.
- If the portfolio has a URL enter it in the URL field.
- Proxy information- you can add them here (i.e. for each portfolio) or you may set it up in the service of the electronic collection. When the proxy is set up in the service of the electronic collection, the settings in the portfolio are: Proxy enabled: No, and the proxy selected is blank.

Proxy is set up in Collection Service	Proxy is not set up in Collection Service or Portfolio is Standalone
Set proxy enabled: No Proxy selected: leave blank	Set proxy enabled: Yes Proxy selected: select default proxy

- Select the Electronic material type: Book, Government document, Journal, Streaming video, etc.

The last section is for **Notes**. A public note will appear in Primo VE.

Notes

Authentication note	<input type="text"/>
Public note	<input type="text"/>
Internal description	<input type="text"/>

Click **Save and Done** to return to the metadata editor. If you want to test access at this point, click **Save and Test Access** to save the portfolio and test access to the remote resource.