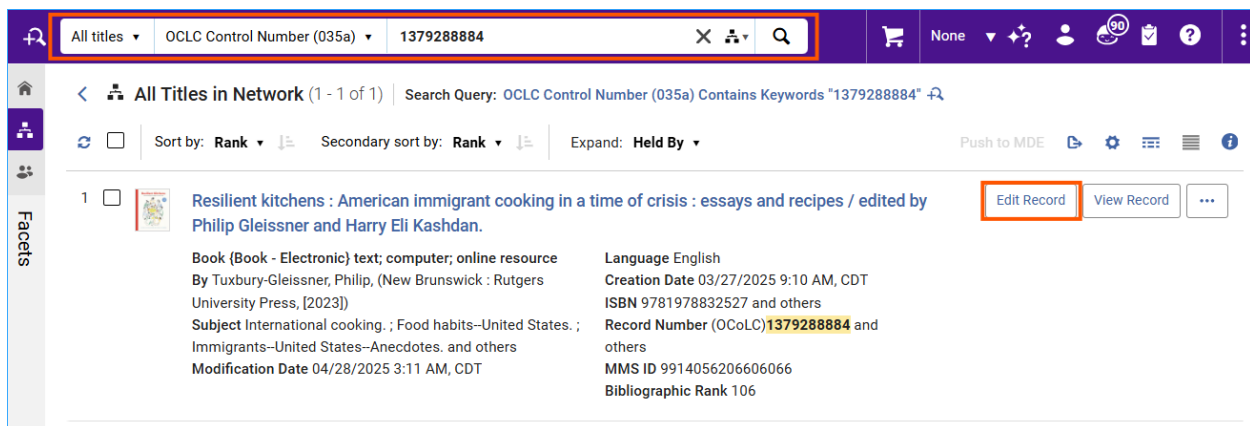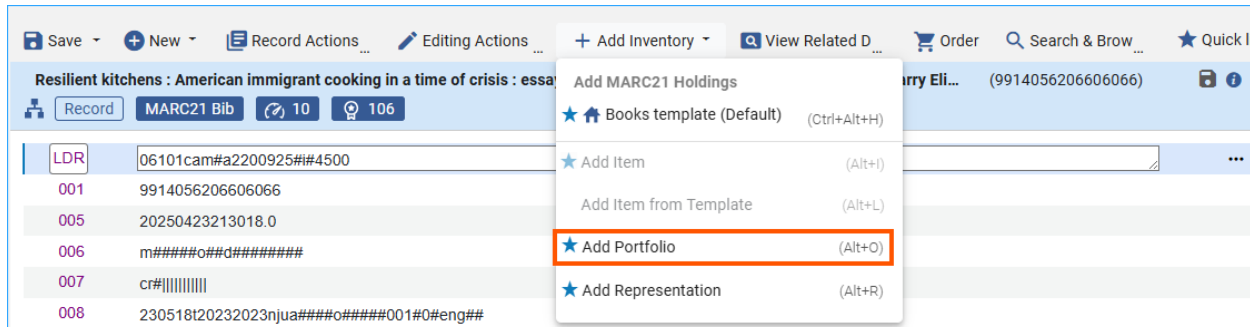# How to Add a Portfolio to a Bibliographic Record

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

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.

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.

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

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

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

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

- 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.

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.