



*Welcome!*

Office Hours will start at 2pm and run until 3pm

Please mute your microphone

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed

This session will be recorded and made available on the CARLI website both as PDF slides and as a recording, with live links to all referenced resources

# August 22, 2019 – CARLI Update

- Configuration Files and instructional materials will be made available next week, the deadline to return Config files is now **September 16, 2019.**
- August 29 and September 5 Open Office Hours will focus on the Configuration Forms and your questions about them.
- Test Migration Extracts have started.  
[https://www.carli.illinois.edu/products-services/i-share/alma/test\\_migration\\_extracts](https://www.carli.illinois.edu/products-services/i-share/alma/test_migration_extracts)



# Community Zone 101

Ben Grimshaw CARLI Open Office Hours: 8/22/2019



- **Introduction**
- Managing Electronic Inventory
- Types of Electronic Collections in the Community Zone
- Knowledge Base Updates
- Searching Authority records in the repository search

# Alma Inventory Model (CARLI's slide)

## Alma's Zones

### Institution Zone

Your institution's metadata, users, configuration

Print: Bibs, Holdings, Items

Electronic: Bibs, Portfolios (i.e., link resolver data)

Bib may be linked or unlinked copies of NZ record

Bib may be linked or unlinked copies of CZ record

Bib may have local extensions (i.e., local tags) for copy-specific metadata

### Network Zone

Bibliographic metadata for all member institutions: Each NZ bib is shared to linked bibs in IZ's.

Shared policies and configurations, e.g., requesting rotas, designating relationships among institutions

Metadata on resources provided by the consortium to all member libraries

Options for shared acquisitions among all libraries and groups of libraries

Consortium level reporting

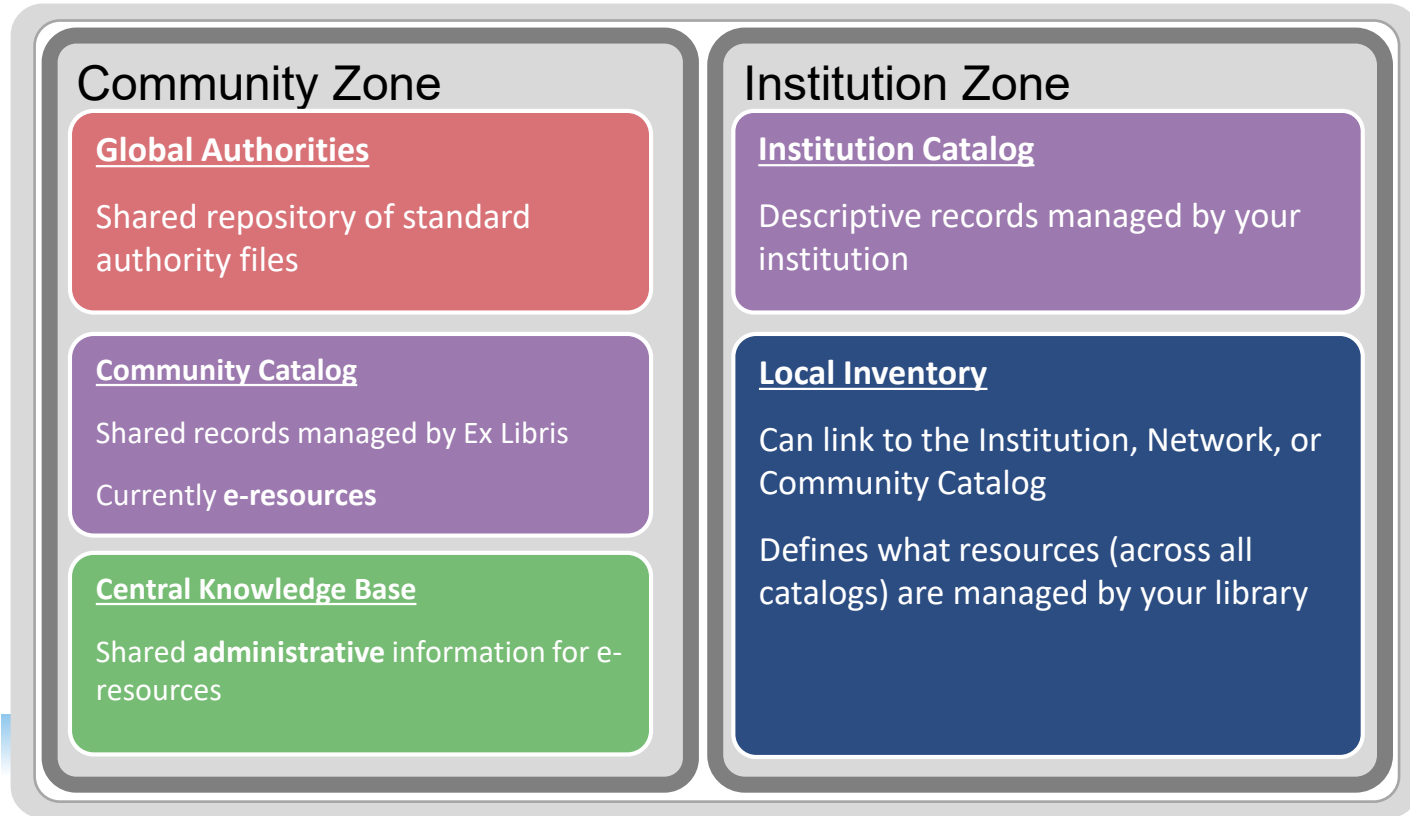
### Community Zone

Global collection of authority records

Community collection of bibliographic metadata on electronic resources

Shared knowledgebase of electronic resource administrative data

# Today's focus is how institutions can utilize the CZ to manage electronic resources and authority data.



## Community Zone Components

1. Community Catalog
  - ▶ Bibliographic records describing electronic resources
2. Central Knowledgebase (Electronic inventory)
  - ▶ Electronic Collections of electronic resources **offered by vendors**, with **linking information** and **individual titles** in the Electronic Collections
3. Global Authorities
  - ▶ Authority files of many different vocabularies, for example LC names and subjects, MESH and GND from Deutsche Nationalbibliothek



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# Managing Electronic Inventory

- The process of managing electronic inventory via the CZ starts by activating or ordering an aggregator or selective electronic collection from the CZ. This:
  1. Creates a local (in the institution) inventory record
  2. A local copy of a bibliographic record which is linked to the CZ
- Following this any time a change is made to the inventory or the bibliographic record in the CZ it will also automatically be reflected in the Institution.
- It is also possible to use your own descriptive (bibliographic) record for CZ activated resources.



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## Types of Electronic Collections in the Community Zone

The Community Zone includes two types of Electronic Collections:

1. Aggregator
  - ▶ Activated at the electronic collection level. Large collections where titles are added or removed by the content provider over time.
2. Selective
  - ▶ Typically used to selectively activate a list of titles from the electronic collection.



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# Knowledge Base Updates

- In each institution the job “Synchronize Changes from CZ” runs and creates the necessary changes based on the specific inventory of the institution.
- Please note: this job is intentionally **not** active in Sandboxes or in any of the current vanguard environments at this time.

Name	Job ID	Job Category	Creator	Submit Date	Start Date	End Date	Status	
1 Synchronize Changes from CZ	4461619030...	Data services	System	12/17/2017 22:00:07 MST	12/17/2017 22:02:56 MST	12/17/2017 22:06:42 MST	Completed Successfully	...

# Knowledge Base Updates

The changes which occur in the KB are of two types:

1. Changes done for all electronic collection types
  - ▶ electronic collection base URL updates
  - ▶ electronic collection linking parameters updates
  - ▶ Portfolio coverage updates
  - ▶ electronic collection service deletions
  - ▶ electronic collection deletions
2. Changes done for auto-activate Electronic Collections
  - ▶ Portfolio added
  - ▶ Portfolio deleted

# Community Zone Updates Task List

- The Community Updates Task List has two tabs:
  1. Review
    - ▶ Is the default tab
    - ▶ Includes changes to institutional records and changes which library staff may want to review.
  2. All
    - ▶ Changes which are listed for general information and transparency

# Community Zone Updates Task List

- The types of changes included may be filtered

Community Zone Updates Task List

Dismiss Selected | Execute | Back

Review | All

Submit Date Range: 12/17/2017 - 12/18/2017

1 - 20 of 121 | Title | Search

Action: Look-up or select

- All
- Portfolio deleted from non auto-active package
- Electronic collection deleted
- Electronic collection linking parameters update
- Portfolio coverage update
- Portfolio linking parameters update
- Electronic collection base url updated
- Electronic collection service deleted
- Electronic Collection Bibliographic Record Update

Identifier	Submit Date	Before Change	After Change	Local Information
	12/1...	null	url=https://pubs.geoscienc...	-
144-8463	12/1...	Available from 1981 volume: 1 issue: 1.	Available from 2013 volume: 33 issue: 1.	-
071-0822	12/1...	Available from 1955 volume: 1. Most recent 5 year(s) not available.	Available from 1955 volume: 1. Most recent 3 year(s) not available.	-
2305-7254	12/1...	Available from 2013.	Available from 2012.	-



# Community Zone Updates Task List

- Here for example in the “Review” tab we have filtered for “Electronic collection Base URL updated”

Community Zone Updates Task List

Dismiss Selected Execute Back

Review All

Submit Date Range 12/17/2017 - 12/18/2017 X

1 - 1 of 1 Title Q

Action: Electronic collection base url updated

Report Type	Electronic Collection Name	Title	Identifier	Submit Date	Before Change	After Change	Local Information
1 <input type="checkbox"/> Electronic collection base url updated	GeoScienceWorld	-	-	12/17/2017	null	url=https://pubs.geoscience...	-

# Community Zone Updates Task List

- And now we see the electronic collection URL which was added

< Electronic Service Editor

<b>Collection name</b>	GeoScienceWorld	<b>Collection ID</b>	6144797520002341
<b>Service type</b>	Full Text	<b>Service ID</b>	6244798510002341
<b>Provider package code (DB id)</b>	RGW		

Activation Information   Service Description   Linking Information   Portfolios   Notes   History

General Linking Information

Parser **Geo::GSW**

Parser (override)

**Parser parameters** **url=https://pubs.geoscienceworld.org**

Parser parameters (override)

URL type  Dynamic URL  Parser Parameters

# Community Zone Updates Task List

- To keep the change and move on choose “Dismiss”
- The record will then be removed from the “Review” tab of the Community Zone Updates Task List
- To revert the change choose “Edit” and edit as desired.

Action : Electronic collection base url updated ▾

<input type="checkbox"/>	Report Type ▾	Electronic Collection Name	Title ▾	Identifier	Submit Date ▾	Before Change	After Change	Local Information
1 <input type="checkbox"/>	Electronic collection base url updated	GeoScienceWorld	-	-	12/17/2017	null	url=https://pubs.geoscience...	-

Dismiss

Edit

View hidden

# Community Zone Updates Task List: auto-activate Electronic Collections

Community Zone Updates Task List

Review All

Submit Date Range 12/17/2017 - 12/18/2017 X

1 - 20 of 70 Title

Action: Look-up or select

Report	Action
1	Portfolio deleted from Auto active package
1	Portfolio added to auto-active package
	Portfolio added to non auto-active package
	Portfolio coverage update
2	Portfolio linking parameters update
	Portfolio deleted from non auto-active package
	Electronic collection deleted
3	Electronic collection base url updated
	Electronic collection linking parameters update
	Electronic collection service deleted
4	Electronic Collection Bibliographic Record Update

- These filters allow you to check for portfolios that have been added to aggregator and selective packages.
- Typically no action is required for auto-active packages or non auto-active packages if you did not purchase those titles.



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- **Searching Authority records in the repository search**

# Authorities in the repository search

- Borges, Jorge Luis, 1899-1986 MMS ID 98112434690000041

13 **Borges, Jorge Luis, 1899-1986**

[Search bibliographic records matching this value](#)

Record number: (DLC)n 79007035

Vocabulary: **LCNAMES**

MMS ID: 98112434690000041

Seen from: Bürkhis, Khürkhī Lūwis, 1986-1899  
بورخيس, خورخي لويس, 1986-1899  
豪尔赫·路易斯·博尔赫斯, 1899-1986 and others, 1899-1986

Originating System ID: n 79007035

See also: Suárez Lynch, B., Bustos Domecq, H.

Creation Date: -

Modification Date: -

Borges, Jorge Luis, 1899-1986

MMS ID	98112434690000041	Brief level	-	Record format	marc21_authority
Vocabulary	LCNAMES	Originating system ID	n 79007035	Originating system version	20190418140006.0
Originating system	LIBRARY_OF_CONGRESS				



LDR	03502cz a2200577n 4500
001	98112434690000041
005	20190418140006.0
008	790124n  azannaabn  b aaa
010	__  a n 79007035  z n 82021645  z n 80105133
035	__  a (OCoLC)oca00241165
035	__  a (DLC)n 79007035
040	__  a DLC  b eng  e rda  c DLC  d DLC  d DLC-R  d DLC  d NjP  d OCoLC  d DLC  d DNLM  d OCoLC  d CST  d ICU  d FU  d UPB  d DLC  d InU  d NjP  d DLC
046	__  f 1899-08-24  g 1986-03-26  2 edtf
053	_0  a PQ7797.B635
100	1_  a Borges, Jorge Luis,  d 1899-1986
370	__  a Buenos Aires (Argentina)  b Geneva (Switzerland)  2 naf



Thank you!

Questions?

*Thank you!*

Join us next Thursday at 2pm for another Office Hour

You can always contact CARLI at [support@carli.illinois.edu](mailto:support@carli.illinois.edu)