

Electronic Resource Migration - P2E & Link Resolver

CARLI Office Hours | October 3, 2019

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a ProQuest Company



- **Reports related to P2E & Link Resolver migration**
 - Migration Stat Report
 - Link Resolver Activation Report (aka LR Stat report)
 - ProQuest Enrichment Report



Migration Stat Report

- **ALL institutions will receive this report regardless of whether or not a P2E file or Link Resolver data was provided**

- **Check the bib_inventory tab first:**

ILS = P2E

Link Resolver = 360, Ebsco, SFX

Counts	#
Number of Bibs	386905
Number of Hols	19185
Number of Items	19312
Number of Portfolios from Link Resolver	394616
Number of Portfolios from ILS	6508
Number of Packages/DBs from Link Resolver	338
Number of Packages/DBs from ILS	0

- **Check the p2e tab for rejected records**

Migration Stat Report – Check counts



Number of Portfolios from Link Resolver	282203	<p>Electronic portfolios ▾ Zone: <input checked="" type="radio"/> Institution <input type="radio"/> Network</p> <p>Is Standalone ▾ Equals ▾ No </p>
Number of Portfolios from ILS	61348	<p>Electronic portfolios ▾ Zone: <input checked="" type="radio"/> Institution <input type="radio"/> Network <input type="radio"/> Community</p> <p>Is Standalone ▾ Equals ▾ Yes ▾</p>
Number of Packages/DBs from Link Resolver	211	<p>Electronic collection ▾ Zone: <input checked="" type="radio"/> Institution <input type="radio"/> Network <input type="radio"/> Community</p> <p>Is Local (Electronic Cc ▾ Equals ▾ No</p>
Number of Packages/DBs from ILS	0	<p>Electronic collection ▾ Zone: <input checked="" type="radio"/> Institution <input type="radio"/> Network</p> <p>Is Local (Electronic Cc ▾ Equals ▾ Yes</p>

Link Resolver Activation (aka LR Stat) Report



- **ONLY institutions that migrated 360 Link Resolver data will receive this report**
- **4 tabs in the report**
 - Statistics
 - 360 DB to Alma E-collection
 - Selective titles without ID
 - Titles for unmatched collection

https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/360_and_Intota_to_Alma_Migration_Guide

ProQuest Enrichment Report



- You will receive this report if:
 - Your library has purchased e-resources through ProQuest

AND

- Not all e-resources to which you subscribe were included in your Link Resolver data

Sample report:

Availability	Electronic Collection Name	Service Type	Electronic Collection Type	Number of portfolios
	Legislative Insight Digital Archi		Database	
	History Vault: NAACP Papers: S		Database	
	ProQuest Historical Newspape	Full Text	Selective package	5
	ProQuest Statistical Abstract of	Full Text	Selective package	2
	Dissertations & Theses @ DePa		Database	
	ProQuest Congressional Hearin		Database	
	ProQuest Historical Newspape	Full Text	Selective package	12



P2E overview and options for clean-up

Managing Record Duplication in Alma

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KEY TOPICS

- **How does the p2e process records?**
- **Background: Why is Clean-up Necessary?**
- **Recommended Processes**
- **Documentation**

Background

- When moving from a multi-system environment to a single-system environment, some duplication is inevitable
- De-duplication can only be managed to a limited degree as part of the migration
 - Information may not be consistent enough to assure accuracy
 - ILS records may have been enriched bibliographic records from vendors – and thus may be preferred
 - ILS records are frequently associated with order information
- Instead we frequently rely on Alma-Primo's robust deduplication and link resolver preference tools to ensure end user experience is unaffected

Recommended Processes for Data Cleanup: Pre Migration

- The migration form allows you to define a link resolver prefix

INVENTORY		
List the prefix for SFX or other link resolver system record numbers		If you use SFX for your link resolver system, then put '(SFX)' here. The migration program will look for the string in the 035 \$a field and skip records where the string is found. If you use a different link resolver system other than SFX, put a string that indicates records from that system here. Multiple strings are allowed, separated by semicolon, for example:(SFX);ssj;ebrary. Default: '(SFX)'.

Recommended Processes for Data Cleanup: Pre Migration continued..

- This link resolver prefix is present in the 035 field
- By adding this prefix to your electronic bibs in the ILS, you can prevent duplicates from migrating
- You can also not submit the bib records for electronic records you know will be included with your link resolver activations

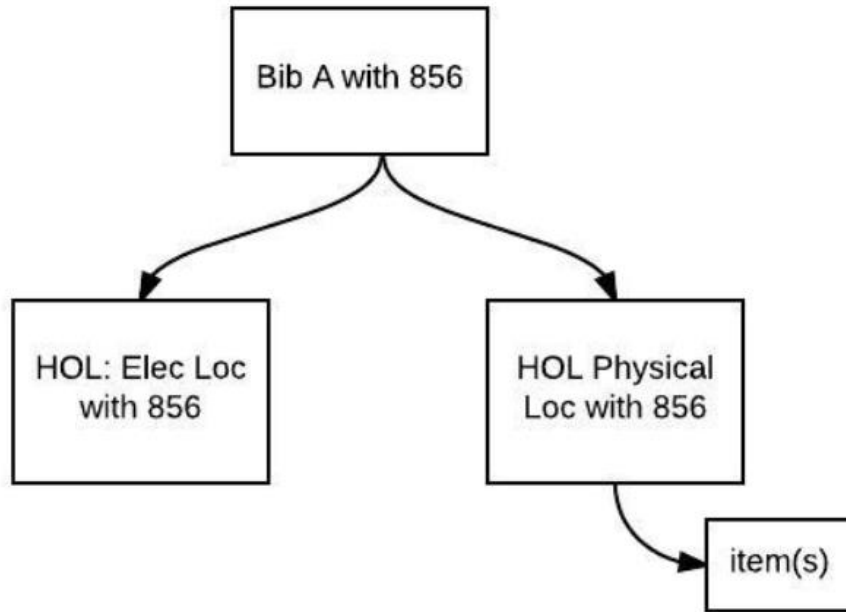
Primary Data Sources used in Electronic Resource Migration

- P2E – file of Voyager bib IDs representing electronic resources and their types (portfolio, package, or database). Used in conjunction with Electronic location designation on Location tab of Migration form:

G	
Electronic Location?	
Yes	Y
No	Y
No	N
No	

- Link Resolver Data (SFX, 360, Ebsco)

P2E - Two holdings 1 electronic with URL in e-holding



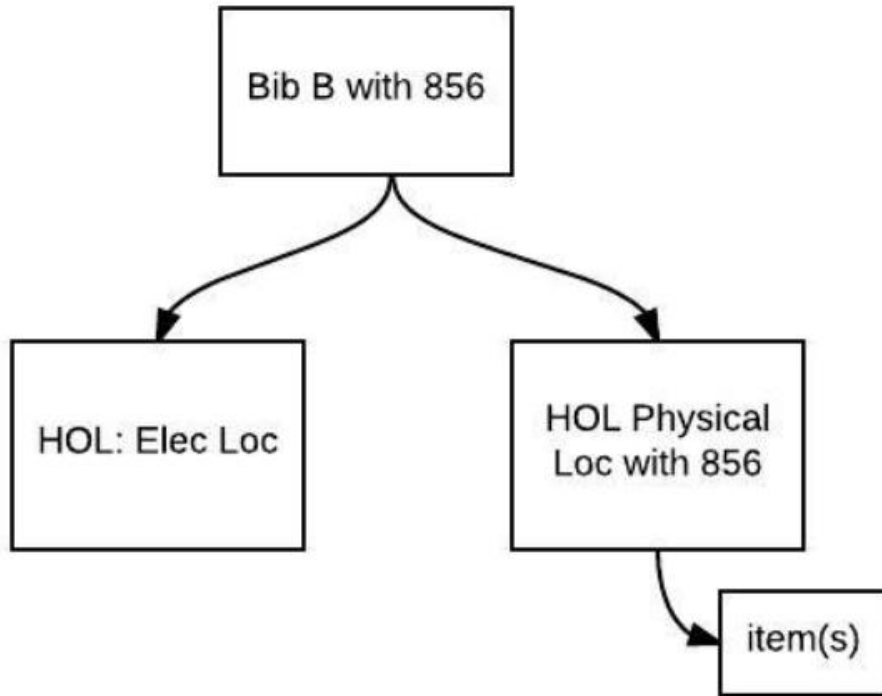
The electronic holding location should be **listed in your migration form**.

The p2e process will use the URL in the **856 of the electronic holding record** to create the portfolio then delete this holding.

Physical location is ignored/migrated as is.

Bib URL is not used.

P2E - Two holdings but no URL in electronic holding

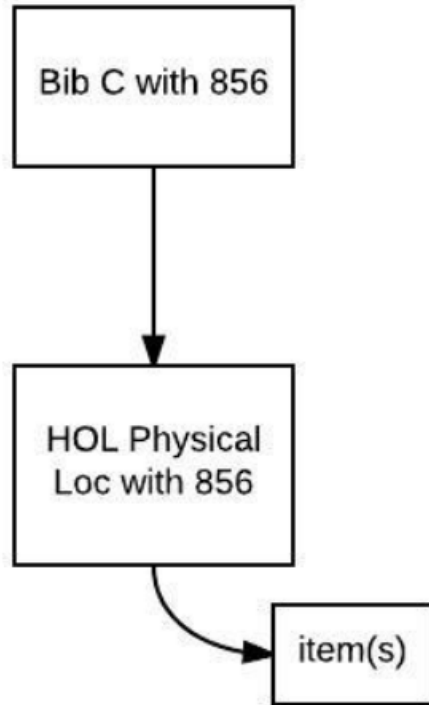


If the electronic holding location is listed in your migration form then the electronic holding can still be converted into a stand alone portfolio from the URL in the Bibliographic record if the holding record doesn't contain the URL.

Physical holding is ignored/migrated as is.

Electronic holding deleted after creation of portfolio.

P2E- No electronic holding record URL in bib (bib in p2e list)



None of the holding records associated with a bib are listed as electronic but the **bib identifier is listed in the p2e file. (This is assumed in all previous slides as well)**

Portfolio will be generated based on the bib record only.

856\$u URL from the bib will be used to create the portfolio.

Physical holding will be ignored and migrated as is.

Associated orders are converted by this logic

Physical orders can not be associated with electronic inventory.

The following are the analogous e-order types for the input Physical order types and e-inventory types defined in the P2E input.

P Order Type	E Inventory	E Order type
Print * One Time	Portfolio	Electronic * One Time
Print * One Time	E-Collection (Package and Database)	E-Collection * One Time
Print * Subscription	Portfolio	Electronic * Subscription
Print * Subscription	E-Collection (Package and Database)	E-Collection * Subscription
Print * Standing Order	Portfolio	Electronic * Standing Order
Print * Standing Order	E-Collection (Package and Database)	E-collection * Subscription

Recommended Processes for Data Cleanup: Post Go Live

Delete Duplicate Electronic Portfolios/Unwanted P2E Records

Use Case 1

- During Migration, you provided a p2e file of ILS bib records representing eResources. You also provided data from your link resolver (SFX for example).
- Post-migration you notice duplicate records—one coming from the p2e and another from the link resolver data
- Goal: Remove the ILS migrated P2E portfolio and retain the CZ linked portfolio

Recommended Processes for Data Cleanup: Post Go Live

Delete Duplicate Electronic Portfolios/Unwanted P2E Records

Use Case 2

- Migrated ILS P2E records contained multiple 856 fields in the and an electronic portfolio was created for each one.
- Goal: Remove duplicate P2E portfolios

Recommended Processes for Data Cleanup: Post Go Live

Delete Duplicate Electronic Portfolios/Unwanted P2E Records

Clean-up option 1

- Create a set of standalone portfolios
 - Tip! To find P2E portfolios, search for: Electronic Portfolio “Is Standalone” equals “Yes”
 - Add additional search criteria as needed
 - Ex: URL contains <https://proxy.proquest.com/openurl?>
 - Ex: Title: Tag Suppressed (Title) equals “Yes”
 - Ex: Interface Name contains “ProQuest Full-Text” (this would be the value you had in the bib & specified as the *Provider Name* field on the migration form)
 - Save Query
- Run **Delete Portfolios** job
- **Result:** Duplicate local portfolios and their related bib (if bib is not linked to any orders or other inventory) are removed.

Recommended Processes for Data Cleanup: Post Go Live

Delete Duplicate Electronic Portfolios/Unwanted P2E Records

Clean-up option 2

- Create a set of standalone portfolios
 - Tip! To find P2E portfolios, search for: Electronic Portfolio “Is Standalone” equals “Yes”
 - Add additional search criteria as needed
 - Ex: URL contains <https://proxy.proquest.com/openurl?>
 - Ex: Title: Tag Suppressed (Title) equals “Yes”
 - Ex: Interface Name contains “ProQuest Full-Text” (this would be the value you had in the bib & specified as the *Provider Name* field on the migration form)
 - Save Query
- Use the Export URLs job to create a .csv file of all URLs in the standalone portfolios set (see Alma documentation on *Running Manual Jobs on Defined Sets* for more info)
- Use Excel to identify duplicate values & modify the Excel so it includes *only* the IDs you want to delete
- Use the file of IDs to create an itemized set of “IDS to Delete”
- Run *Delete Portfolios* job
- **Result:** Duplicate local portfolios and their related bib (if bib is not linked to any orders or other inventory) are removed.

Recommended Processes for Data Cleanup: Post Go Live

Group ILS-migrated P2E portfolios into local collections to make them easier to manage

Use Case

- I have many ILS-migrated P2E portfolios for *Films on Demand*. Rather than managing them individually, I want to create a local electronic collection within Alma so I can manage them as a group.

Recommended Processes for Data Cleanup: Post Go Live

Group ILS-migrated P2E portfolios into local collections to make them easier to manage

Clean-up

- Create a set of standalone portfolios that should be in the local electronic collection
 - Electronic Portfolio “Is Standalone” equals “Yes”
 - Add additional criteria (ex. URL contains “http://filmsondemand.com)
 - Save Query
 - Tip! To find P2E portfolios, search for: Electronic Portfolio “Is Standalone” equals “Yes”
 - Add additional search criteria as needed
 - Ex: URL contains <https://proxy.proquest.com/openurl?>
 - Ex: Title: Tag Suppressed (Title) equals “Yes”
 - Ex: Interface Name contains “ProQuest Full-Text” (this would be the value you had in the bib & specified as the *Provider Name* field on the migration form)
 - Save Query

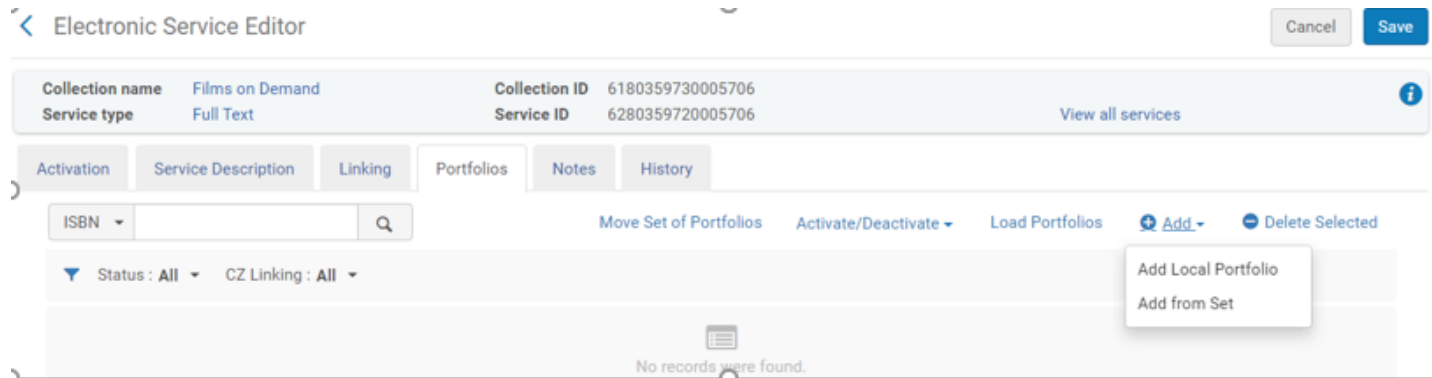
Continued on next slide

Recommended Processes for Data Cleanup: Post Go Live

Group ILS-migrated P2E portfolios into local collections to make them easier to manage

Clean-up continued

- Create a Local Electronic Collection
 - On the “Portfolios” tab, use “add from set” to associate the portfolios with this collection

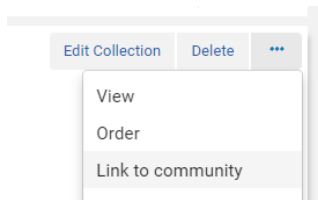


- **Result:** Local portfolios contained in this local electronic collection can now be managed within the collection.

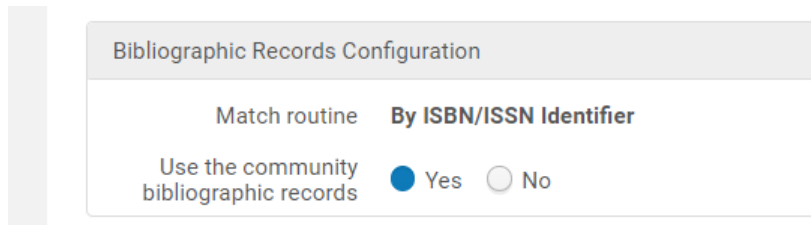
Recommended Processes for Data Clean-up: Post Go Live

Link P2E portfolios to CZ Collection (Takes care of LR/P2E duplication!)

- Do everything on the previous 2 slides (add standalone portfolios to a local collection).
- From the collection, click actions >> Link to Community



- Choose your collection
- Specify whether to use your bibs or the CZ bibs

A screenshot of a configuration dialog box titled "Bibliographic Records Configuration". It contains two sections. The first section is "Match routine" with a dropdown menu set to "By ISBN/ISSN Identifier". The second section is "Use the community bibliographic records" with two radio buttons: "Yes" (which is selected) and "No".

Recommended Processes for Data Cleanup: Post Go Live

Remove proxy prefix from P2E portfolio URL

Use Case:

- Proxy URL for ILS-migrated P2E portfolios contains our EZProxy prefix. Enable Proxy is set to “Yes” so the EZProxy prefix configured in Alma is automatically prepended to these URLs during link resolution. Resolution is failing because two EZProxy prefixes are being applied.
- Goal: Remove EZProxy prefix from ILS-migrated P2E portfolios

Recommended Processes for Data Cleanup: Post Go Live

Remove proxy prefix from P2E portfolio URL

Clean-up

- Create a set of standalone portfolios
 - Electronic Portfolio “Is Standalone” equals “Yes”
 - URL contains “http://proxy.institution.edu/login?url=”)
 - Save Query
- Run the “Change Electronic Portfolio Information” Job

<input type="checkbox"/>	Delete or replace uri's prefix	<input type="text" value="http://proxy.institution.edu."/>	with	<input type="text"/>
<input type="checkbox"/>	Enable proxy	<input type="radio"/> No <input checked="" type="radio"/> Yes		<input type="text" value="Unconditionally"/>
<input type="checkbox"/>	Set proxy	<input type="text"/>		<input type="text" value="Unconditionally"/>

- **Result:** EZProxy prefix is removed

Recommended Processes for Data Clean-up: Post Go Live

- After going through the above there may still be some duplication not yet handled
- These duplicates can be addressed manually and may include:
 - ILS records for packages/collections that were used as acquisition records
 - Do an advanced search for: Electronic Collections where All titles (Originating System contains keywords "ILS") and Electronic Collection (Electronic collection Type equals "Selective package").
 - Relink any orders to the CZ record
 - Delete duplicate
 - ILS records for portfolios that were, likewise, acquisition records
 - Do an advanced search for: Electronic portfolio where All titles (Tag Suppressed equals "Yes" and Originating System contains keywords "ILS") and Electronic Portfolio (Is Standalone equals "Yes" and Material Type equals "Journal")
 - Relink any orders to the CZ record
 - Delete duplicate

A complex network diagram with numerous nodes and connecting lines in various colors (blue, red, yellow, black) on a light blue background. A dark grey rectangular box is overlaid on the left side of the image.

Documentation

Documentation

- [Managing Duplication in Alma](#)
 - available in the *Handling Electronic Resources in Alma* migration documentation
- [Duplicate Title Analysis](#)
 - this tool is an excellent way to identify duplicates in Alma across formats
- [Managing Electronic Resources](#)
 - a high level look at electronic resource management in Alma, including performing global changes on sets of portfolios, linking local e-resources to the community, and more