Electronic Resource Migration - P2E & Link Resolver

CARLI Office Hours | February 13, 2020

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Types of P2E

- **Portfolio:** is a specific full text electronic title that includes coverage, services and link information (99% of your bibs will probably be portfolios)

    (Format: 123456-yyydb,portfolio)

- **Package:** is a collection of full text journals from a specific data provider (aggregator or selective)
    - Aggregator packages: all titles in the package are subscribed to (ex.: Ebscohost Academic Search Complete)
    - Selective packages: individually subscribed-to titles (ex.: Elsevier Science Direct Freedom Collection

        (Format: 123456-yyydb,package)

- **Database:** used for searching and retrieving data, citations (ex.: Facts on File, Oxford English Dictionary Online)
    - No Full-Text

        (Format: 123456-yyydb,DB)

P2E – Bib designated as a Portfolio

P2E: 3058306-SICdb,portfolio

245 from SIC bib:

245 0   0 $$a Laboratory methods in enzymology. $$p Protein, $$n Part D / $$c edited by Jon R. Lorsch.

****

Alma Standalone "local" portfolio:

7 🏠 **Laboratory methods in enzymology. Protein, Part D / edited by Jon R. Lorsch.**
ScienceDirect: getFullTxt
ISBN: 9780128002797
ISBN (13): 9780128002797

Electronic Material Type: Book
Creation Date: 09/11/2019 12:57:52 CDT
Modification Date: 09/11/2019 12:57:57 CDT

Portfolio ID:
53104213350005889

****

Note: At migration, SIC bib ID 3058306 was linked to bib 18314785-01carli_network

Laboratory methods in enzymology. Protein, Part D / edited by Jon R. Lorsch.

MMS ID	9930583063405889	**Suppress from publishing**	No
Brief level	10	**Record Format**	marc21
Originating system	ILS	**Originating system ID**	18314785-01carli_network

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P2E – Bib designated as a package

P2E: 1515309-SICdb,package

245 from SIC bib

245 0   0 $$a Early American imprints. $$n Series I, $$p Evans (1639-1800) $$h [electronic resource].

****

Alma Local Electronic Collection:

1 🏠 **Early American imprints.**
   Type: Selective package
   Creation Date: 09/11/2019 12:57:05 CDT
   Modification Date: 09/11/2019 12:57:05 CDT

   Collection ID: 61104058480005889

****

Note: At migration, SIC bib ID 3058306 was linked to bib 5462837-01carli_network:

Early American imprints. Series I, Evans (1639-1800) [electronic resource].

MMS ID	9915153093405889	**Suppress from publishing**	No
Brief level	10	**Record Format**	marc21
Originating system	ILS	**Originating system ID**	5462837-01carli_network

P2E – Bib designated as a database

P2E: 2192027-SICdb,DB

245 from SIC bib:

245 0 0 $$a Oxford bibliographies online $$h [electronic resource].

****

Alma Local Electronic Collection:

1 🏠 Oxford bibliographies online
   Type: Database
   Interface name: OBO
   Creation Date: 09/11/2019 11:49:00 CDT
   Modification Date: 09/11/2019 11:49:00 CDT

****

Note: At migration SIC bib 2192027 was linked to bib **11689092-01carli_network**

Oxford bibliographies online [electronic resource].

MMS ID	9966882153405899	**Suppress from publishing**	No
Brief level	10	**Record Format**	marc21
Originating system	ILS	**Originating system ID**	11689092-01carli_network

- **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**

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Migration Stat Report – Check counts

Number of Portfolios from Link Resolver	282203	
Number of Portfolios from ILS	61348	
Number of Packages/DBs from Link Resolver	211	
Number of Packages/DBs from ILS	0	

Electronic portfolios ▾ Zone: ● 🏠 Institution ○ 🔗 Network

Is Standalone ▾	Equals ▾	No

Electronic portfolios ▾ Zone: ● 🏠 Institution ○ 🔗 Network ○ 👥 Community

Is Standalone ▾	Equals ▾	Yes ▾

Electronic collection ▾ Zone: ● 🏠 Institution ○ 🔗 Network ○ 👤

Is Local (Electronic Cc ▾	Equals ▾	No

Electronic collection ▾ Zone: ● 🏠 Institution ○ 🔗 Network

Is Local (Electronic Cc ▾	Equals ▾	Yes

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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 o	Full Text	Selective package	2
	Dissertations & Theses @ DePa		Database	
	ProQuest Congressional Hearir		Database	
	ProQuest Historical Newspape	Full Text	Selective package	12

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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**

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- 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 Voyager bib records for electronic records you know will be included with your link resolver activations (submit a Work Request Online to CARLI requesting batch delete of resources in Voyager)

- You can also suppress bibs in the P2E that you wish you delete later in Alma. No e-resources are generated for suppressed bibs in the P2E.

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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
No
No
No

- Link Resolver Data (SFX, 360, Ebsco)

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P2E - Two holdings 1 electronic with URL in e-holding
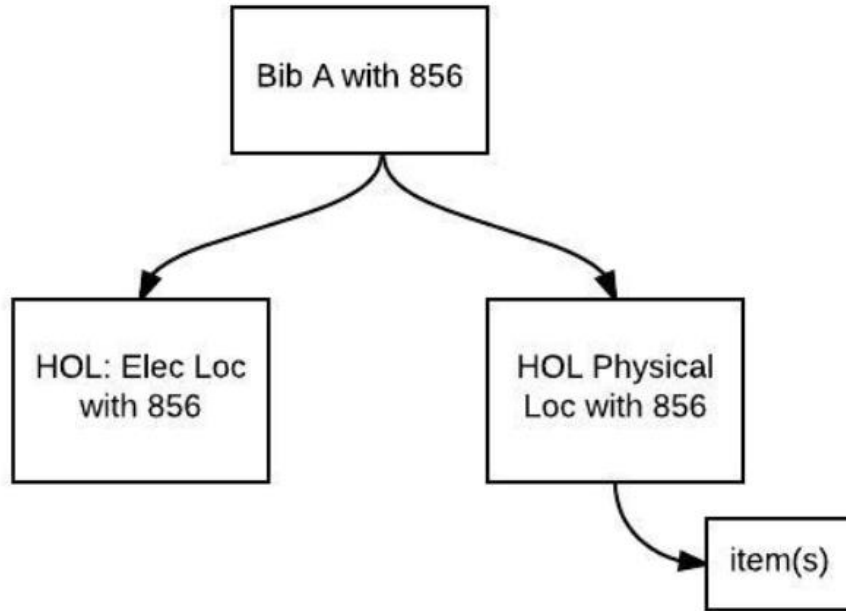
The electronic holding location should be listed in your migration form.

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.

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P2E - Two holdings but no URL in electronic holding
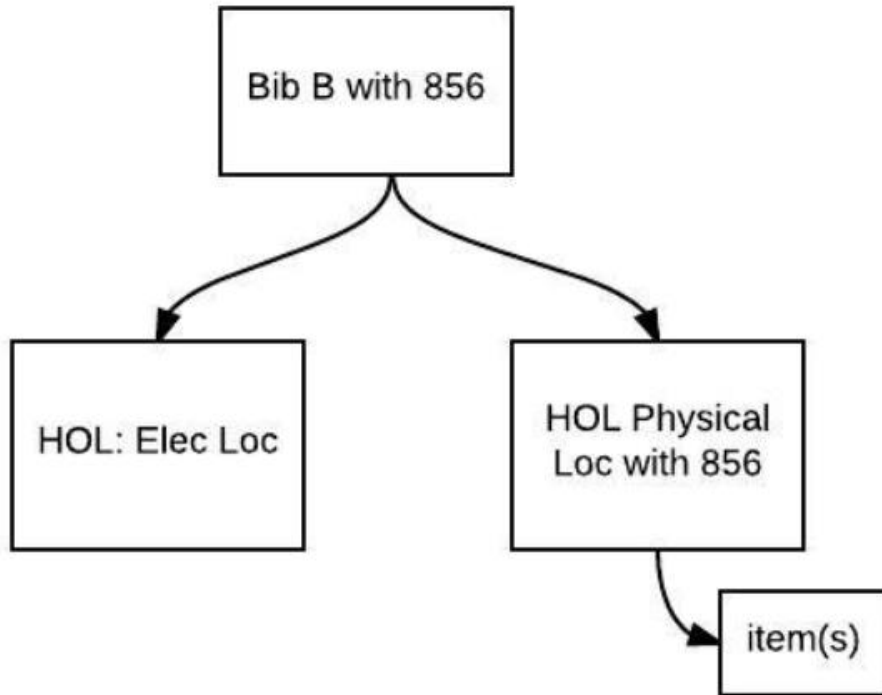
If the electronic holding location is listed in your migration form then the electronic holding can still be converted into a stand alone portfolio from the URL in the Bibliographic record if the holding record doesn't contain the URL.

Physical holding is ignored/migrated as is.

Electronic holding deleted after creation of portfolio.

None of the holding records associated with a bib is 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

https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/Electronic_Resource_Handling_in_Alma_Migration_(P2E)#Orders

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

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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.

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 Porfolio "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)
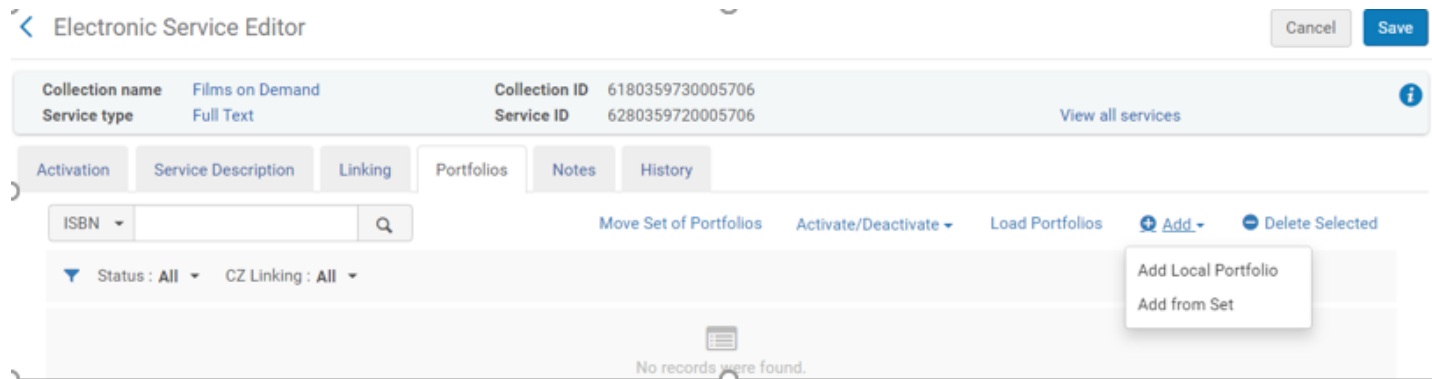   - Save Query
- Use the Export URLs job to create a .csv file of all URLs in the standalone portfolios set (see Alma documentation on _Running Manual Jobs on Defined Sets_ for more info)
- Use Excel to identify duplicate values & modify the Excel so it includes *only* the IDs you want to delete
- Use 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.

<u>Group ILS-migrated P2E portfolios into local collections to make them easier to manage</u>

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 Porfolio "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

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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.

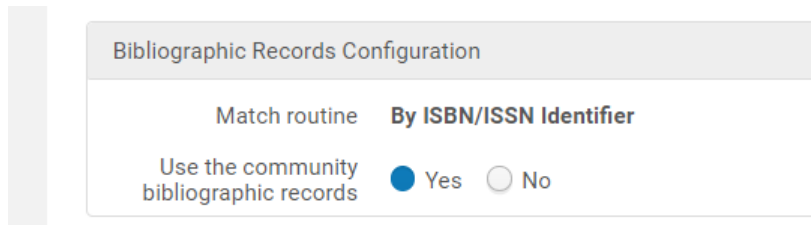## *Link P2E portfolios to CZ Collection (Takes care of LR/P2E duplication!)*

- Do everything on the previous 2 slides (add standalone portfolios to a local collection).
- From the collection, click actions >> Link to Community
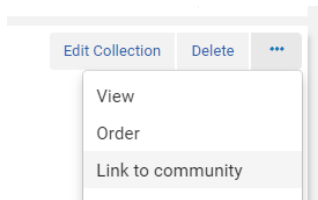
- Choose your collection
- Specify whether to use your bibs or the CZ bibs

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

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

☐	Delete or replace url's prefix	http://proxy.institution.edu,	with	
☐	Enable proxy	○ No ● Yes		Unconditionally ▼
☐	Set proxy	▼		Unconditionally ▼

- **Result**: EZProxy prefix is removed

Recommended Processes for Data Cleanup: Post Go Live

Locate duplicate electronic portfolios or electronic collections that were used as acquisitions records in your ILS

Use Case

- We have duplicate records for eResources—one record migrated as part of ILS P2E migration and the other as part of link resolver migration. We don't need the ILS P2E record but it is linked to an order. We want to use the CZ record only and remove the ILS P2E record.
- Goal: Remove acquisitions record and relink order to CZ record.
- Link to documentation: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/045Closing%2C_Reopening%2C_and_Relinking_PO_Lines#Relinking_PO_Lines

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