Welcome!

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

Please mute your microphone and turn off your camera.

During the Q&A session, 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.

CARLI

P2E REFRESHER/REMINDERS

April 23, 2020

What is P2E? A Reminder…

The Physical to Electronic (or Print to Electronic) Process during the Alma Migration allows you to define what inventory in your Voyager database actually represent electronic portfolios, packages, or databases.

During the P2E process the identified inventory (and an associated order record in Voyager Acquisitions) is transformed into Alma portfolios, packages, or databases.

Portfolios, Packages, and Databases?

Portfolio – Title level e-resource. A single book or journal.
   * Most titles on your P2E from Voyager will be Portfolios

Package – A group of Portfolios. These can include Aggregator databases like *EBSCO Academic Search Premier* or a Selective Package like *Gale Cengage Virtual Reference Library* where you may only have access to some Titles (Portfolios)

Database – a non-full-text resource used for searching and retrieving data, citations. An example includes OED Online.

"The P2E"

- For the Production Migration/Cutover:
  - File p2e_prod_xxx.xlsx will be provided in your XXX Production Load Box Folder
- p2e_prod_xxx.xlsx will be provided by **April 27**
- P2E File due **May 1**
- Return P2E File to your XXX Production Load Box Folder
- You must update your new P2E File

P2E : File Size

- Excel file size may be large
  - To request the file be split down further, email support@carli.illinois.edu
    - If CARLI staff split your file for the test load we'll do it again for your production load.
  - Rename and save your P2E file edits back to Box if too large to save locally

P2E: Contents

- P2E Info: bib ID, database code, portfolio (assigned automatically)

> 171127-NCCdb,portfolio

- Location Name, Location Code, Location ID
- Call Number
- Bib Suppressed, MFHD Suppressed
- PO Number, PO ID, Line Item ID, PO Note, Line Item Note
- MFHD ID
- Title
- 856 Field

> 856:40:$3SpringerLink$uhttps://login.libproxy.noctrl.edu/login?url=http://dx.doi.org/
> 10.1007/978-3-540-88419-4$zAccess for North Central College

P2E: Thoughts for the Production Migration File

- Your new p2e_prod_xxx.xlsx file contains all titles in your e-resource locations in Voyager as of April 25, 2020.

- You need to review and edit (as appropriate) the new P2E file, don't rely on checking "just new bibids" since the bib_id could have changed

- You may want to refer to your Original P2E from the test load (available in your XXX Archive Folder in Box) to find titles you did change to Database or Package, so you can quickly update those on your new P2E

  - Use Excel's CTRL – F Function.

- If you found something didn't migrate correctly during the test load now is your chance to change it to a different resource type.

P2E Reminders

The 856 $u

1. Processing first looks for the electronic holding's 856 $u

2. If no electronic holding, then looks to 856s in the bib

   -Potential problems with looking to the bib:

   -provider neutral records creating multiple e-inventory

   -versions or related resource links creating e-inventory

P2E Reminders

What does 856=NOT FOUND indicate in P2E report?

- this indicates no 856 was present in the MFHD. Review these to be sure the resource should really be transformed as e-inventory, and to check if an 856 is present in the bib record.

What if a bib identified in the P2E does not represent an electronic resource?

- If the resource should migrate as physical and not electronic, remove it from your P2E file. Anything not included in the P2E file will migrate as a physical resource. If it is not an electronic resource, also consider if it still belongs in the electronic location in Voyager.

P2E: What to return to CARLI?

Full P2E Edited with those resources that are Packages or Databases updated in Column A

03	105802-TRNdb,portfolio	110463	Self-therapy for the stutterer / by Malcolm Fraser.	856:40:$uhttp://www.stutteringhelp.org/portals/english/book_0012_tenth_ed.pdf$yFree PDF text
04	115892-TRNdb,portfolio	117975	Allergy testing.	856:40:$3Kanopy.$uhttp://trnty.kanopystreaming.com/node/77089$yAvailable to Trinity students,
05	105882-TRNdb,database	110540	UNCAP : Uncovering Chicago Archives Project.	856:40:$uhttp://uncap.lib.uchicago.edu/
06	106297-TRNdb,database	110958	Getty provenance index databases [electronic resour	856:40:$uhttp://www.getty.edu/research/tools/provenance/search.html$yFree online access
07	106409-TRNdb,database	111071	Project Vote Smart [electronic resource] : the most tr	856:40:$uhttp://votesmart.org/$yFree online resource
08	106481-TRNdb,portfolio	111144	Atlas of the historical geography of the United States	856:40:$uhttp://dsl.richmond.edu/historicalatlas/$yFree online resource
09	106689-TRNdb,portfolio	111350	Open Access and the Humanities : Contexts, Controve	856:40:$uhttp://dx.doi.org/10.1017/CBO9781316161012$yAvailable online
10	107173-TRNdb,database	111846	Founders online.	856:4 :$uhttp://founders.archives.gov/
11	107204-TRNdb,portfolio	111877	Hispanic Americans in Congress, 1822-2012 / prepare	856:40:$uhttp://www.gpo.gov/fdsys/pkg/GPO-CDOC-108hdoc225/content-detail.html$yOnline gov
12	107376-TRNdb,portfolio	112051	Foreign relations of the United States, 1948. I, part 1,	856:40:$uhttp://history.state.gov/historicaldocuments/frus1948v01p1$yGeneral; the United Natior

OR Edited P2E Info column only (Column A) in a new file.

146221-nccdb,portfolio
109447-nccdb,portfolio
162562-nccdb,database
322186-nccdb,package
162435-nccdb,portfolio
110057-nccdb,portfolio
110073-nccdb,portfolio
110074-nccdb,portfolio
191935-nccdb,package

Email support@carli.illinois.edu when the file is uploaded.

P2E Review

- As a reminder after the migration is complete there will be clean up from your P2E process, this is expected.
  - October 3, 2019 Open Office Hours on P2E
  - February 13, 2020 Open Office Hours on P2E

- More step by step guidance planned soon from CARLI.

P2E Resources

- [Preparing your P2E File](#) – CARLI Instructions

- [Electronic Resource Handling in Alma Migration](#)

- [Migration of Physical to Electronic (P2E) Resources](#)

- [Voyager to Alma Migration Guide](#)

Questions?

As always please contact CARLI Support with questions!

support@carli.illinois.edu

Thank you!