

# Agenda – P2E Open Office Hours

- Introduction & Reminders
- Types of E-Resources
- Sandbox Access - Demo
- General P2E questions
- Acquisitions Questions



# 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)

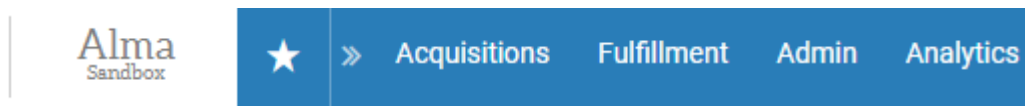
**Database** – a non-full-text resource used for searching and retrieving data, citations. An example includes OED Online.



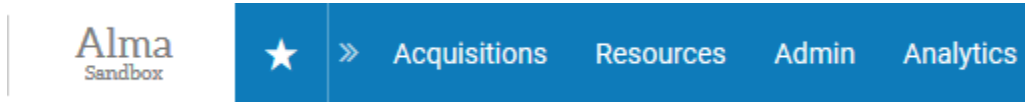
# Sandbox Access

- Basics
- Best Practices
- Roles = What You Can Access

## CircAdmin

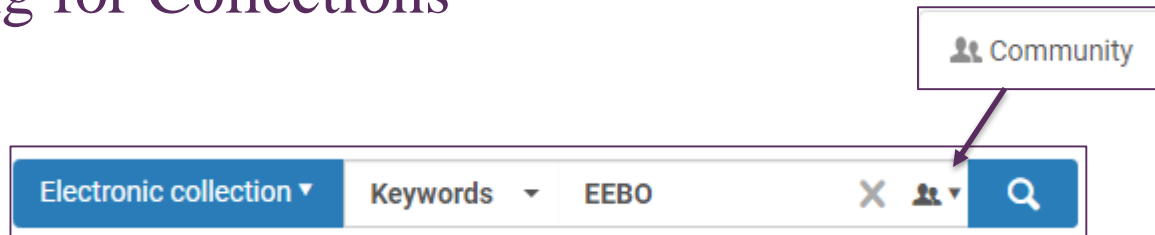


## CatAdmin



# Community Zone (CZ)

- What is included in the CZ?
  - Contributions:
    - Guidelines
      - [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040\\_Resource\\_Management/040Metadata\\_Management/110Community\\_Zone\\_Contribution\\_Guidelines](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040_Resource_Management/040Metadata_Management/110Community_Zone_Contribution_Guidelines)
    - Standards and Policies
      - <http://tiny.cc/040q8y>
    - Linking to the CZ
- Searching for Collections



# General P2E Questions

- Can we include multiple locations for provider names on the migration form?
  - Voyager to Alma Migration Guide:  
[https://knowledge.exlibrisgroup.com/Alma/Implementation\\_and\\_Migration/Migration\\_Guides\\_and\\_Tutorials/Voyager\\_to\\_Alma\\_Migration\\_Guide](https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/Voyager_to_Alma_Migration_Guide)
- Where should we make changes based on errors we see in the P2E report?
- What happens with suppressed MFHDs?
- If I delete a bib ID on the P2E file, will it still migrate?

# Deleting or Skipping Resources from Migration

1. Identify and delete from Voyager any eResources you do not plan to continue to provide.
  - Recommended
  - Complete this prior to data extracts
    - CARLI Work Request Online, Type=Other for bulk deletes.
2. Insert an 035 with the link resolver prefix indicating the record should be skipped by migration
3. Suppress bibs so they migrate to Alma as suppressed, then bulk-delete in Alma



# Acq and P2E

Portfolio, Package, Database – Does it matter?

→ if your bib records have Purchase Orders attached it does!

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

# Clean up

After migration – there will be clean up.

- combination of sources – P2E and Link Resolver – activations will have to be verified
- P2E Portfolios – indicate what Packages they belong to
- Resources that migrated “inactive” when they should be “active”

CARLI Office staff are working on resources to help guide you through clean up.

