

#ERMLIFE AFTER MIGRATION:

Making Alma Work for You

Jenifer Holman

Electronic Resources Librarian | Hope College

holman@hope.edu

AGENDA

- General tips and tricks for day-to-day work with Alma
- Link Resolver Migration/Basic Troubleshooting
- Leveraging Analytics & Sets for Global Changes
- CZUTL: Community Zone Updates
- Ask Questions!



CONGRATULATIONS!!

- Take time to process; migration is a huge, stressful undertaking
- Breathe!
- Take time for self-care
- Breathe again!
- Plan for Celebration





About Hope College

Small, private, Christian liberal arts college located in Holland, MI; population 33,000

Students: 2,967 FTE (all undergraduate)

Most popular majors:

Biology | Psychology | Education | Nursing

Non-Academic Claim to fame: a 99-year old basketball rivalry between Hope and Calvin University.



<https://hope.edu/directory/buildings/van-wylen-library/index.html>

About Van Wylen Library

21 library workers

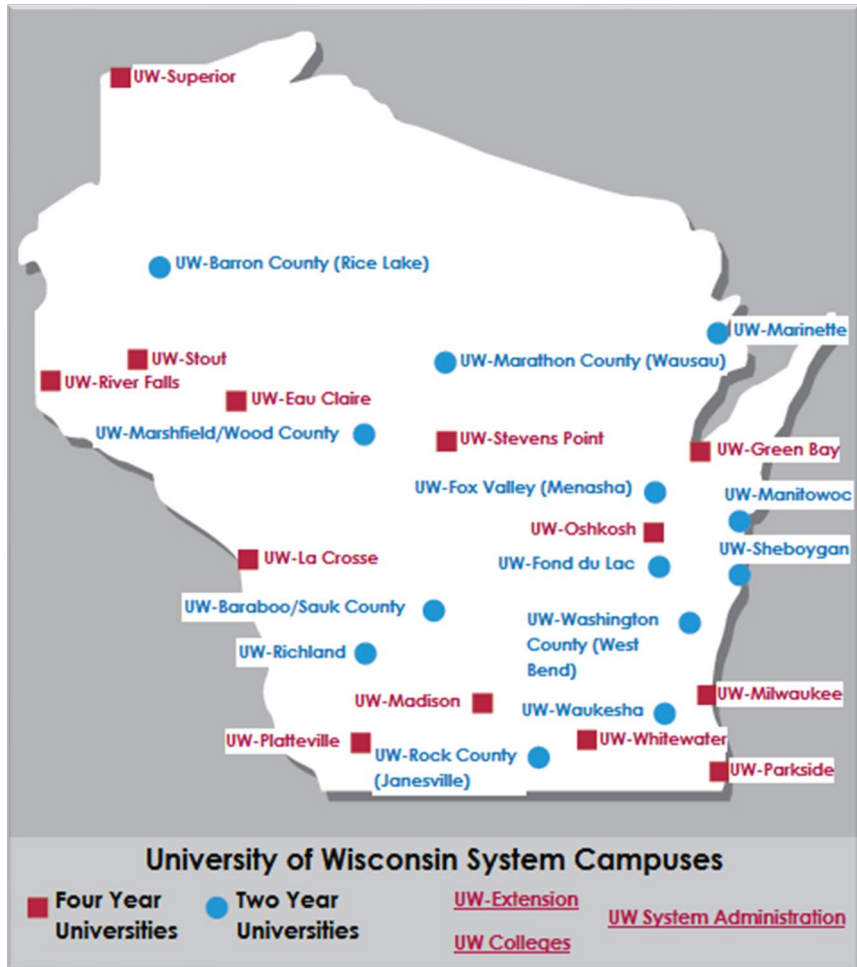
6.25 FTE in Technical Services/Systems




MSSA
MI SHARED SERVICES ALLIANCE

- Oakland University
- Michigan Technological University
- Western Theological Seminary
- Hope College
- Albion College
- Kalamazoo College

UNIVERSITY OF WISCONSIN SYSTEM



- Thirteen 4-year Comprehensive University campuses
- Thirteen 2-year campuses that make up UW Colleges
- UW Extension has offices in most of the 72 counties
- UW System Administration



GENERAL TIPS & TRICKS

- If you can, use 2 monitors to have Alma open in two different browsers (twice the fun!)
- Use the keyboard shortcuts; your wrists will thank you.
<https://wiki.harvard.edu/confluence/display/LibraryStaffDoc/Keyboard+Shortcuts>
- For Windows users, use [TinyTask](#) for repeated tasks.
- Use sets to cut down on repeated tasks (example later!)
- Herd your portfolios into e-collections

Electronic portfolios ▾

Zone: Institution Community

Is Standalone ▾

Equals ▾

Yes

AND OR

Interface Name (Electronic Portfolio) ▾

Contains Keywords ▾

Hope

Electronic Portfolios (1 - 1 of 1) | where (Is Standalone equals "Yes" AND Interface Name (Electronic Portfolio) contains keywords "Hope")

Institution

Community

Sort by : Title - Asc ▾

1 Hope College official catalog.

Portfolio ID: 5353992290004767

Hope College: getFullTxt

Electronic Material Type: Book

Creation Date: 07/04/2018 09:01:11 EDT

Modification Date: 07/04/2018 09:01:17 EDT



[Other details](#)

LINK RESOLVER MIGRATION & BASIC TROUBLESHOOTING TIPS

DATABASE	Alma Read	Link Resolver Button (how are they being linked/file location, etc.)	Base URL
ACS Publications (American Chemical Society)	yes	loaded: G:\My ve\BrandingLogoFiles\Alma\find-full-text.png (4 x 20)	https://col-hope.primo.exlibrisgroup.com/discovery/openurl?institution=COLEGE_OF_HOPE&vid=01COL_HOPE:HOPE&
American Physiological Society	yes		
BioOne	yes	loaded: G:\My ve\BrandingLogoFiles\Alma\BioOneFindFT.j (5x20)	https://col-hope.primo.exlibrisgroup.com/discovery/openurl?institution=COLEGE_OF_HOPE&vid=01COL_HOPE:HOPE&
Cambridge University Press Individual Subscriptions	yes	loaded: G:\My ve\BrandingLogoFiles\Alma\find-full-text.png (4 x 20)	https://col-hope.primo.exlibrisgroup.com/openurl/01COL_HOPE/01COL_HOPE?
Digital Commons	yes		https://col-hope.primo.exlibrisgroup.com/discovery/openurl?institution=COLEGE_OF_HOPE&vid=01COL_HOPE:HOPE&

LINK RESOLVER BASE URL DATA

Track Sites that use your link resolver base URL

MONITOR TRAFFIC THROUGH LINK RESOLVER

If you don't have a document listing which vendors carry your base openURL, you can get a sense of your openURL traffic from a source report:

* Year Month Between 2019-07 - 2020-01

Referring Source ID	Num of Requests	% Total (No of Requ
Grand Total	571	100.0%
CAS:CAPLUS	1	0.2%
EBSCO:CINAHL	94	16.5%
EBSCO:Communication & Mass Media Complete	73	12.8%
ProQ:	1	0.2%
ProQ:ericshell	148	25.9%
ProQ:mlaib	2	0.4%
ProQ:psychology	46	8.1%
ProQ:psycinfo	122	21.4%
PubMed:LinkOut	6	1.1%
firstsearch.oclc.org:MEDLINE	2	0.4%
google	2	0.4%
oup:oro	1	0.2%
oup:orr	3	0.5%
oup:oso	2	0.4%
summon.serialssolutions.com	52	9.1%
uchicago	13	2.3%
www.itergateway.org:iter	3	0.5%

[Print](#) - [Export](#)

SOURCE REPORT FROM ALMA

Compound Layout

Link Resolver Usage

- OpenURL Context Measures
- OpenURL Context Details
- Request Date
- Bibliographic Details
- LC Classifications
- Dewey Classifications
- Other Classifications
- Institution

Catalog

List All

- My Folders
- Shared Folders

Views

- Title
- Pivot Table

Link Resolver Clicks by Source and Date

Pivot Table

Normalized Source	Number of Clicked Requests		Number of Clicked Services (total)	
	FY-2019	FY-2020	FY-2019	FY-2020
EBSCO	4,912	4,912	5,260	5,234
Alma (Alma records accessed from Alma)	477	1,078	477	1,078
WOS (Web of Science)	679	1,045	770	1,109
wiley	361	252	403	284
WorldCat	377	230	433	260
PubMed	388	145	444	163
Google Scholar	91	135	101	142
JSTOR	124	90	145	92
Sage	118	78	130	79
Elsevier	1,036	75	1,052	79
ACS (American Chemical Society)	12	48	12	48
CAS (Chemical Abstracts Service)	247	37	253	39
info:sid/ams.org:MathSciNet		34		34
Cambridge University Press		26		31
YBP GOBI	15	23	15	23
publications:	2	22	2	25
info:sid/www.worldshakesbib.org:wsb		14		19
literatum:tandf		14		15
info:sid/webofscience.com:WOS:MEDLINE	13	11	16	13
literatum:achs		11		11
info:sid/credoreference:credoreference	9	10	10	10
Taylor and Francis	12	8	12	8
info:sid/Ovid:		8		9
FirstSearch:ECO		7		7
H. W. Wilson	3	5	6	5
info:sid/Ovid:ovfti		5		5
series 2 publications:		4		4
EndNote Web	0	3	0	3
LibX	5	3	9	3
info:sid/Ovid:ovftq		3		3
info:sid/en.wikipedia.org:Haka		3		3
info:sid/...	?	?	?	?

ProQuest OASIS Review titles * My lists Orders Profiles

Quick search Find a title Advanced search

Group settings

NLM
 Dewey

Catalogue Check URL/ OpenURL 1.0 Resolver <https://col-hope.primo.exlibrisgroup.com/discovery/openurl>
 **For non-OpenURL 1.0 URLs, use \$ISBN where ISBN is to be inserted.
 Please refer to online help file for [OpenURL 1.0 syntax and examples](#)



LibKey Nomad

Offered by: thirdiron.com

inHope - B x Hope Colle x My Drive - x ER Budget x Hope Colle x

Secure | <https://www.gobi3.com/hx/Falcon.ashx?location=librarypreferences>

GOBI

Spotlight Lists | Search | Notifications | Folders | Reports | Options | Library | Links

Library Preferences

Date Format

Month / Day / Year
 Day / Month / Year
 Display estimated net price
 When there is more than one selection for the same ISBN, and one is ordered or exported, the additional duplicate selections are deleted. Check this box to retain the

OpenURL Settings

Enabled

Base Path

Version

0.1
 1.0

ISBN Format

10 Digit
 13 Digit

GOBI BookZone

Enable GOBI BookZone

2 DIFFERENT TROUBLESHOOTING TOOLS

CTO ('&displayCTO=true)
link resolver debugger tool.

PNX (&showPnx=true)
show full metadata from a
Primo record.





VIDEO

Been rich all my life.

MacDonald, Heather Lyn film director.; Toots Crackin Productions (Firm); Kanopy (Firm)
2006

[Available Online >](#)

DISPLAY CTO

TOP

SEND TO

VIEW ONLINE

DETAILS

LINKS

Send to



TEXT THIS



EMAIL



PERMALINK



CITATION



PRINT



EXPORT
BIBTEX



EXPORT RIS

View Online

Full text availability

[Kanopy Streaming Films](#)



[Report a Problem](#)


CTO: LINK RESOLVER DEBUGGING TOOL

```
▼<u:resolver_content xmlns:u="http://com/exlibris/urm/uresolver/xmlbeans/u">
  ▼<u:context_object>
    ▼<u:keys>
      <u:key id="rft.stitle">Been rich all my life.</u:key>
      <u:key id="rft.pub">Toots Crackin Productions,</u:key>
      <u:key id="rft.place">[San Francisco, California, USA] :</u:key>
      <u:key id="licenseEnable">>true</u:key>
      <u:key id="memberProxyServer">https://login.ezproxy.hope.edu/login</u:key>
      <u:key id="sfx.sid">primo.exlibrisgroup.com-alma_local</u:key>
      <u:key id="memberProxyIp">209.140.195.189</u:key>
      <u:key id="svc.profile">viewit</u:key>
      <u:key id="rft.genre">book</u:key>
      <u:key id="memberUseProxy">Selective</u:key>
      <u:key id="vid">01COL_HOPE:HOPE</u:key>
      <u:key id="institution">4767</u:key>
      <u:key xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" id="memberProxySalt" xsi:nil="true"/>
      <u:key id="rft.oclcnum">1016817929</u:key>
      <u:key xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" id="req.id" xsi:nil="true"/>
      <u:key id="rft.mms_id">991004168714004767</u:key>
      <u:key id="rfr_id">info:sid/primo.exlibrisgroup.com-alma_local</u:key>
      <u:key id="publication_place">[San Francisco, California, USA] :</u:key>
      <u:key id="rft.object_type">OTHERVM</u:key>
      <u:key id="rft.sau">MacDonald, Heather Lyn</u:key>
      <u:key id="memberProxyType">EZProxy</u:key>
      <u:key id="rft.publisher">Toots Crackin Productions,</u:key>
      <u:key id="rft.pubdate">2006.</u:key>
      <u:key id="u.ignore_date_coverage">>true</u:key>
      <u:key id="rft.title">Been rich all my life.</u:key>
      <u:key id="customer">4765</u:key>
      <u:key id="rfr.rfr">primo.exlibrisgroup.com-alma_local</u:key>
    </u:keys>
  </u:context_object>
</u:resolver_content>
```



```
▼<u:context_service service_type="getFullTxt" context_service_id="3032493310004767">
  ▼<u:keys>
    <u:key id="package_name">view full text</u:key>
    <u:key id="package_public_name">Kanopy Streaming Films</u:key>
    <u:key id="package_display_name">Kanopy Streaming Films</u:key>
    <u:key id="package_internal_name">KANOPY_PDA_-_USA</u:key>
    <u:key id="interface_name">view full text</u:key>
    <u:key id="db_id">ACQHD</u:key>
    <u:key id="package_pid">61135709840004767</u:key>
    <u:key id="service_type_description">Full text available via</u:key>
    <u:key id="Is_free">0</u:key>
    <u:key id="request_source">alma_local</u:key>
    <u:key id="portfolio_PID">53136376150004767</u:key>
    <u:key id="electronic_material_type">STREAMINGV</u:key>
    <u:key id="Availability"/>
    <u:key id="static_url">>true</u:key>
    <u:key id="parser_program">Bulk::BULK</u:key>
    <u:key id="parse_parameters">jkey=https://hope.kanopy.com/node/137520</u:key>
    <u:key id="Authentication_note"/>
    <u:key id="public_note"/>
    <u:key id="proxy_enabled">>false</u:key>
    <u:key id="proxy_selected">DEFAULT</u:key>
    <u:key id="related_title">@TITLE (@RelationType)</u:key>
    <u:key id="is_related_service">>false</u:key>
    <u:key id="is_closly_related">>false</u:key>
    <u:key id="license_exist">>false</u:key>
    <u:key id="crossref_enabled">no</u:key>
    <u:key id="preferred_link">>false</u:key>
  /<u:keys>

```

VIDEO **Been rich all my life.** 

MacDonald, Heather Lyn film director.; Toots Crackin Productions (Firm); Kanopy (Firm)
2006

[Available Online >](#)

TOP








SEND TO

VIEW ONLINE

DETAILS


LINKS

Send to _____

 TEXT THIS  EMAIL  PERMALINK  CITATION  PRINT  EXPORT BIBTEXT  EXPORT RIS

View Online _____

Full text availability

[Kanopy Streaming Films](#) 

[Report a Problem](#)

Details _____

Title [Been rich all my life.](#)

Creator MacDonald, Heather Lyn film director. >
Toots Crackin Productions (Firm) >

PNX

```
{
  "display": {
    "source": [ "Alma" ],
    "type": [ "video" ],
    "language": [ "eng" ],
    "title": [ "Been rich all my life." ],
    "subject": [ "Dance -- Tap Dancers -- Friendship.", "Dance -- Harlem Renaissance", "Documentary films" ],
    "format": [ "1 online resource (streaming video file) (80 minutes): digital, .flv file, sound", "video file MPEG-4 Flash" ],
    "identifier": [ "$PCPNUM$V1137519;$COCLC$V(OCOLC)1016817929" ],
    "creationdate": [ "2006" ],
    "lds07": [ "Mode of access: World Wide Web." ],
    "lds01": [ "Title from title frames." ],
    "lds04": [ "Public Performance Rights.", "Access to Kanopy Streaming Films is available only to Hope Students, Faculty, and Staff. Please sign in for acces." ],
    "publisher": [ "Toots Crackin Productions" ],
    "description": [ "\"I'm going to dance, dance, dance til I can't dance no more!\" - Bertye Lou Wood (age 96). Meet the Silver Belles, five tap dancers who per They have rich stories to tell about the history they made during the Harlem Renaissance, illuminated by a treasure trove of archival film and photos. Togeth Belles are bold, brash and gorgeous.\" - Village Voice. \"MARVELOUS! A real treasure.\" - The New Yorker. \"Fabulous heroines, extraordinary energy...they ch Williams, BlackNews.com. \"Charming subjects & a fine sense of history. RECOMMENDED!\" - New York Magazine. \"Never mind the rockettes! See this bea \"mms\": [ \"991004168714004767\" ],
    "contributor": [ "MacDonald, Heather Lyn film director.$QMacDonald, Heather Lyn", "Toots Crackin Productions (Firm)$QToots Crackin Productions (Firm)\" ],
    "genre": [ "History. \" \" ],
    "place": [ "San Francisco, California, USA\" :\" ],
    "version": [ \"1\" ]
  },
  "control": {
    "sourcerecordid": [ \"991004168714004767\" ],
    "recordid": [ \"alma991004168714004767\" ],
    "sourceid": \"alma\",
    "originalsourceid": [ \"kan1137519\" ],
    "sourcesystem": [ \"KANOPY\" ],
    "sourceformat": [ \"MARC21\" ],
    "score": [ \"1.0\" ]
  }
}
```



ARTICLE

Lead-free solid-state organic–inorganic halide perovskite solar cells

Hao, Feng ; Stoumpos, Constantinos C ; Cao, Duyen Hanh ; Chang, Robert P. H ; Kanatzidis, Mercouri G

Nature photonics, 2014, Vol.8 (6), p.489-494

PEER REVIEWED

[Available Online >](#)

[View Issue Contents](#)

TOP

SEND TO

VIEW ONLINE

DETAILS

LINKS

CITATIONS

DISPLAY CTO

Send to



TEXT THIS



EMAIL



PERMALINK



CITATION



PRINT



EXPORT
BIBTEX



EXPORT RIS

View Online

Full text availability

[View full text in collection](#)



[Report a Problem](#)

Details

EXAMPLE: TROUBLESHOOTING

simulated full sunlight. Further efficiency enhancements are expected with a better fundamental understanding of the internal electron dynamics and device engineering. The reported CH₃NH₃SnI_{3-x}Br_x perovskite solar cells realize the realization of low-cost, environmentally friendly solid-state solar cells.

Publisher

London: Springer Science and Business Media LLC

Source

Biotechnology and BioEngineering Abstracts

© ProQuest LLC All rights reserved



HIDE

Identifier

ISSN: 1749-1892

```
<?xml version="1.0" encoding="UTF-8"?>
<record xmlns="http://www.exlibrisgroup.com/xsd/primo/primo_nm
<control>
  <sourceid>proquest_P64</sourceid>
  <recordid>cdi_osti_scitechconnect_1167723</recordid>
  <sourcerecordid>1658144666</sourcerecordid>
  <sourceformat>XML</sourceformat>
  <sourcesystem>Other</sourcesystem>
```

PNX RECORD

RESOLUTION: DELETE OSTI COLLECTION

1

OSTI.GOV

Type: Database

CDI Type: Full Text
Collection

Creation Date: 12/15/2019
22:33:10 EST

Modification Date:
06/21/2020 20:45:58 EDT

In CDI: Yes

Provider coverage: Yes

Search Rights in CDI: Free

Full Text Rights in CDI:
Subscription (Collection
Level)

Full Text Linking in CDI:
Link in record




ARTICLE

Lead-free solid-state organic-inorganic halide perovskite solar cells

Hao, Feng ; Stoumpos, Constantinos C ; Cao, Duyen Hanh ; Chang, Robert P. H ; Kanatzidis, Mercouri G

Nature Photonics, 2014-05-04, Vol.8 (6)

 PEER REVIEWED

[Available Online >](#)

[View Issue Contents](#) 

TOP

SEND TO

VIEW ONLINE

DETAILS

LINKS

Send to



TEXT THIS



EMAIL



PERMALINK



CITATION



PRINT



EXPORT
BIBTEX



EXPORT RIS

View Online

Full text availability

[EBSCOhost Academic Search Complete](#)

Available from 2007 volume: 1 issue: 1 until 2015.



[Report a Problem](#)

Details

LEVERAGING ANALYTICS & SETS

Local Portfolio Maintenance

Electronic Collection Public Name	Availability	Material Type	Portfolio Linked To CZ
AIP Scitation American Association of Physics Teachers	Available	Journal	No

American
American
Astrophys
DOAJ Dir
EBSCO
Early Eng
Ebook Ce
Elsevier S
Free E- J
GeoScien
Highwire I
Highwire I
IngentaC
MPublishi
Nature
Nineteenth Century Collections Online
Oxford Handbooks Online
Oxford Reference Ebooks
~~Oxford University Press Journals Current~~
Portico Triggered Ejournal For Participants
ProQuest PAO Periodicals Archive Online Liberal Arts Collection
Royal Society of Chemistry Journals
SAGE Complete
Single Journals
SpringerLink Journals Complete
Taylor & Fr
Watson Lib
Wiley-Black
eDuke Jour

Electronic Collection Public Name	Availability	Material Type	Portfolio Linked To CZ
Atlantic Magazine Archive	Available	Journal	No
Bloomberg Businessweek Digital Archive	Available	Journal	No
EBSCOhost ATLA Serials	Available	Journal	No
Ebook Central Perpetual and DDA Titles	Available	Journal	No
Nineteenth Century Collections Online	Available	Journal	No
Single Journals	Available	Journal	No
SpringerLink Journals Complete	Available	Journal	No
Watson Library Art Catalogs	Available	Journal	No

Nineteenth Century Collections Online	Available	Journal	No
Oxford Handbooks Online	Available	Journal	No
Oxford Reference Ebooks	Available	Journal	No
Oxford University Press Journals Current	Available	Journal	No
Portico Triggered Ejournal For Participants	Available	Journal	No
ProQuest PAO Periodicals Archive Online Liberal Arts Collection	Available	Journal	No
Royal Society of Chemistry Journals	Available	Journal	No
SAGE Complete	Available	Journal	No
Single Journals	Available	Journal	No
SpringerLink Journals Complete	Available	Journal	No

→ & not ava

Electronic Collection	Portfolio
Electronic Collection Public Name	Availability
	Material Type
	Portfolio Linked To CZ

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking

- Lifecycle is equal to / is in In Repository
- AND** Portfolio Linked To CZ is equal to / is in No
- AND** Material Type is equal to / is in Journal

E-COLLECTIONS WITH PORTFOLIOS NOT LINKED TO THE CZ (COMMUNITY ZONE)

ACTIVE COLLECTIONS WITH UNAVAILABLE PORTFOLIOS

Portfolio	Bibliographic Details	Electronic Collection	Portfolio Creation Date
Portfolio Id	Title	Electronic Collection Public Name	Portfolio Creation Date

Filters

Add filters to the analysis criteria by clicking on Filter option for t

Availability is equal to / is in None; Not Available

AND Lifecycle is equal to / is in In Repository

Active Collections with Unavailable Electronic Portfolios

Electronic Collection Public Name	Portfolio Creation Date	Portfolio Id	Title	
Elsevier ScienceDirect Journals	7/4/2018	5362632330004767	Journal of academic librarianship.	
		5362632590004767	Journal of emergency nursing.	
		5362632630004767	The lancet.	
		5362632810004767	Journal of experimental social psychology.	
		5362632830004767	Developmental biology.	
		5362632850004767	Animal behaviour.	
Gale Literature Criticism		5366090380004767	Contemporary literary criticism. Volume 154	
		5366096430004767	Contemporary literary criticism. Volume 8	
		5366107460004767	Contemporary literary criticism. Volume 227	
		5366107500004767	Contemporary literary criticism. Volume 228	
		5366107540004767	Contemporary literary criticism. Volume 229	
		5366107800004767	Contemporary literary criticism. Volume 226	
		5366107960004767	Contemporary literary criticism. Volume 239	
		5366108080004767	Contemporary literary criticism. Volume 230	
		5366108100004767	Contemporary literary criticism. Volume 231	
		5366108660004767	Contemporary literary criticism. Volume 240	
		3/31/2020	53125219950004767	CONCEPTUAL FOUNDATIONS OF QUANTUM MECHANICS.
		5/12/2020	53129159220004767	FUTURE OF NUCLEAR WASTE : WHAT ART AND ARCHAEOLOGY CAN TELL US ABOUT SECURING THE WORLD'S MOST HAZARD

[Edit](#) - [Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#) - [Copy](#)

USING ANALYTICS TO CREATE SETS

From HTML From Text New Database Query Refresh All Connections Properties Edit Links Sort Filter Clear Reapply Advanced Text to Columns Flash Fill Remove Duplicates Data Validation Consolidate What-If Analysis Group Ungroup Subtotal Show Detail Hide Detail

E2 X ✓ fx ="9780203131725"

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Document	Title	Publisher	PubDate	eISBN	Subject	Collection	Library ID	Visible	Owned	Subscribed	Purchase	Date Purch	Total ATC	Access M-T
2	165943	Discourse	Taylor & Frai	9/18/97	9780203131725	Language/Linguistics		10057269	Yes	Yes	No	EBOOK (firm	12/22/14		1-user
3	178974	State, Power	Taylor & Frai	8/19/04	9780203403259	Political Scie	Subscription:	10161679	Yes	Yes	Yes	EBOOK (firm	1/13/15		1-user
4	182205	Continental f	Taylor & Frai	9/9/05	9780203482100	Philosophy	Subscription:	10163548	Yes	Yes	Yes	EBOOK (firm	10/18/16		1-user
5	239011	Named Orga	John Wiley &	4/1/05	9780470026441	Science: Chemistry; Scienc		10301753	Yes	Yes	No	EBOOK (firm	2/19/16		1-user
6	240399	Reconceptua	Taylor & Frai	4/1/98	9780203984734	Education		10164589	Yes	Yes	No	EBOOK (firm	6/23/10		1-user
7	243490	Sport, Dance	Bloomsbury	7/1/03	9781845205737	Sport & Recreation; S		10040328	Yes	Yes	No	EBOOK (firm	12/22/14		1-user
8	267184	Engineering	Morgan & Cl	12/1/06	9781598290912	Engineering: Civil; Enginee		10515673	Yes	Yes	No	EBOOK (firm	10/11/12		1-user
9	269202	Protestant Cl	Palgrave Ma	10/14/03	9780230522893	Religion		10263197	Yes	Yes	No	EBOOK (firm	7/10/14		1-user
10	324939	Body Image	Taylor & Frai	9/12/07	9780203004340	Psychology; Social Science		10204832	Yes	Yes	No	EBOOK (firm	9/15/15		1-user
11	325550	Inside Role-F	Taylor & Frai	3/27/08	9780203930304	Education		10205145	Yes	Yes	No	EBOOK (firm	6/23/10		1-user
12	329139	Encyclopedia	ABC-CLIO, LL	12/30/07	9780313055058	Social Science		10214073	Yes	Yes	No	EBOOK (firm	4/1/11		1-user
13	331001	Political App	Taylor & Frai	2/29/08	9780203928677	Education		10225320	Yes	Yes	No	EBOOK (firm	6/23/10		1-user
14	333187	Testing Time	Taylor & Frai	4/11/08	9780203930502	Education		10236103	Yes	Yes	No	EBOOK (firm	6/23/10		1-user
15	334241	Why Dissecti	ABC-CLIO, LL	2/28/08	9780313351501	Social Scienc	Subscription:	10215647	Yes	Yes	Yes	EBOOK (firm	6/23/10		1-user
16	336284	Educating Sp	Routledge	6/25/08	9780203927632	Education		10228320	Yes	Yes	No	EBOOK (firm	6/23/10		1-user
17	339247	Creating Wri	David Fulton	6/26/08	9780203927434	Education		10236259	Yes	Yes	No	EBOOK (firm	6/23/10		1-user
18	340795	Autism Spec	Guilford Pub	2/5/08	9781606230046	Psychology; Medicine		10225084	Yes	Yes	No	EBOOK (firm	6/23/10		1-user
19	345170	Theory and C	Routledge	5/15/08	9780203927281	Education		10228571	Yes	Yes	No	EBOOK (firm	6/23/10		1-user
20	346224	The Future o	Taylor & Frai	6/11/08	9780203895082	Education		10236226	Yes	Yes	No	EBOOK (firm	6/23/10		1-user
21	347203	Rigorous Ma	Cambridge U	6/1/08	9780511407956	Mathematic; Subscription:		10235059	Yes	Yes	Yes	EBOOK (firm	6/23/10		1-user
22	350868	A Companion	John Wiley &	12/27/04	9780470999868	General Wor	Subscription:	10240501	Yes	Yes	Yes	EBOOK (firm	1/15/11		1-user
23	351085	Dyslexia : St	John Wiley &	11/30/00	9780470777961	Education		10236595	Yes	Yes	No	EBOOK (firm	6/23/10		1-user

Criteria Results Prompts Advanced

Subject Areas

- E-Inventory
 - Portfolio
 - Portfolio Activation Date
 - Portfolio Creation Date
 - Portfolio Modification Date
 - Portfolio Library Unit
 - Portfolio License
 - Portfolio PO Line
 - Portfolio URL Information
 - Portfolio Details for Consortia
 - Electronic Collection
 - Electronic Collection Creation
 - Electronic Collection Library U
 - Electronic Collection License
 - Electronic Collection Material
 - Electronic Collection PO Line
 - Electronic Collection Type
 - Electronic Collection URL Infor
 - Service
 - Service Details
 - Service Type
 - Service URL Information

Catalog

- List All
- My Folders
 - Shared Folders

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit the button next to its name.

Portfolio	Bibliographic Details	Electronic Collection	Portfolio	
Portfolio Id	ISBN (Normalized)	Title	Electronic Collection Public Name	Portfolio Authentication Note

Filters

Add filters to the analysis criteria by clicking on Filter name in the catalog pane.

Electronic Collection Public Name is equal to

New Filter

Column ISBN (Normalized)

Operator is equal to / is in

Value

Add More Options Clear All

- Protect Filter
- Convert this filter to SQL

OK Cancel

normalized)



to / is in



ter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its

Select Values



Available



Name Starts



Search

Match Case

Loading...

Selected



OK Cancel

Electronic Collection Portfolio

Title Electronic Collection Public Name Portfolio Authentication Note

Edit ? ×

Edit

9780202940300
9781498799386
9781351696623
9783110612387
9781351616980
9780429814020
9780472124589
9781351260237
9781498531177
9781119472018
9783030020804
9781498566087
9781119570431
9780190854621
9781119456889
9781119570424
9781119413080
9781119570400
9780807047422

OK Cancel

\$3.50
(Clothbound)
(electronic: 1912552140; 9781912552146; 0745955037; 97807459

< Set Details

Add Members to Set

Cancel

Save

General Information

Set name * **Single User Ebooks**

Description

Note

Set content type * **Electronic portfolios**

Set type **Itemized**

Private Yes No

Status Active Inactive

Creation date **07/23/2020 17:58:37 EDT**

Created by **Ex Libris**

Updated by **Ex Libris**

Content Origin Institution only Discovery

Set ID -

Add Contents from File to Set

From File From Analytics

Analytic Folder

Recent reports

Name

Single User Ebook Central Titles Set

[Download report](#)

Run a Job - Select Job to Run

 GuideMe

1

1 - 4 of 4

Description ▾

portfolio



Type : All ▾

Source type : All ▾

Content type : All ▾

	▾ Name	↕ Description	Content Type	↕ Type
1	<input type="radio"/> Move electronic portfolio information	Move electronic portfolio information	Electronic collections	Information Update
2	<input type="radio"/> Export Electronic Portfolios	Export active electronic portfolios information	Portfolio	Export
3	<input type="radio"/> Delete portfolios	Delete portfolios task.	Portfolio	Withdraw
4	<input checked="" type="radio"/> Change electronic portfolio information	Update portfolio information for a set of electronic portfolios	Portfolio	Information Update

Set availability status

Active

Inactive

Override public note

Override authentication
note

Override internal
description

Set activation date



Set expected activation
date



CZUTL

CZUTL PROCEDURES & BEST PRACTICES

- Sunshine Carter and Stacie Traill (U of Minnesota) have written an excellent, detailed manual:
<https://docs.google.com/document/d/1dXaqOuc8o4luyDDphRugjtE-gz-gRNmI023gNNeOKEE/edit>
- Also see their amazing 2018 presentation slides outlining everything you need to know about the Community Zone:
http://documents.el-una.org/1790/1/traill_umwug2018.pdf
- Do not wait a year to start managing your Community Zone Updates Tasks!
- While 75% of the tasks can be quickly dismissed, 25% of the tasks will be changes requiring testing and problems that need to be addressed
- Staying on top of the task list is a great way to keep your e-resources linked properly and cut down on problem reports.

Type :

Q Look-up or select

All

Portfolio deleted from non auto-active package

Electronic collection deleted

Electronic service linking parameters update

Portfolio coverage update

Portfolio linking parameters update

Electronic service base url updated

Electronic service deleted

Electronic collection bibliographic record update

CZUTL REPORT TYPES

Community Zone Updates Task List

Submit Date Range: **07/06/2020 - 08/24/2020**

1 - 2 of 2

Report Type : **Portfolio coverage update**

	<input type="checkbox"/>	Report Type	Electronic Collection Name	Identifi	Title	Submit Date	Before Change	After Change	Local Information	
1	<input type="checkbox"/>	Portfolio coverage update	DOAJ Directory of Open Access Journals	1027-6750	Agenda internacional.	07/21/20...	Available from 2012.	Available from 1994.	-	<input type="button" value="More"/>
2	<input type="checkbox"/>	Portfolio coverage update	DOAJ Directory of Open Access Journals	2172-7910	HachetetepÃ©: Revista CientÃ©fica de EducaciÃ³n y ComunicaciÃ³n	07/22/20...	Available from 2015.	Available from 2010.	-	<input type="button" value="More"/>

Community Zone Updates Task List

Look-up or select

Execu

Review

All

Dismiss Selected

Show all it

Dismiss All

Submit Date

03/01/2020 - 05/25/2020



Range

1 - 50 of 183

Collection Name

springerlink




Report Type : Portfolio deleted from non auto-active package

<input type="checkbox"/>	Report Type	Electronic Collection Name	Identifi	Title	Submit Date	Before Change	After Change	
1	<input type="checkbox"/>	Portfolio deleted from non auto-active package	SpringerLink Journals Complete	0895-8815	International journal of value-based management.	04/05/20...	-	-
2	<input type="checkbox"/>	Portfolio deleted from non auto-active package	SpringerLink Journals Complete	0044-264X	Zeitschrift für Ernährungswissenc... Journal of nutritional sciences. Journal des sciences de la nutrition.	04/05/20...	-	-
		Portfolio deleted						

< 1 of 4 >

CZUTL EXAMPLES:
PORTFOLIO DELETED FROM
NON AUTO-ACTIVE

5	<input checked="" type="checkbox"/>	Electro... service base url updated	Journals@Ovid Complete	-	-	06/18/20...	url=https://ovidsp.ovid.co... &user=\$\$USERNAME &password=\$\$PASSWORD &logout=\$\$LOGOUT &ipauth=\$\$IPAUTH & athens_id=\$\$ATHENS_ID &db_code=ovft & url2=https://openathens.... ssl/home.oa & athens_base=\$\$ATHENS...	url=https://ovidsp.ovid.c... &user=\$\$USERNAME &password=\$\$PASSWO... &logout=\$\$LOGOUT &ipauth=\$\$IPAUTH & athens_id=\$\$ATHENS_ID &db_code=ovft & url2=https://openathens.... & athens_base=\$\$ATHENS...	Linking params: \$\$USERNA... \$\$PASSWO... \$\$LOGOUT \$\$IPAUTH Value: yes \$\$ATHENS... \$\$SHIBBOL... \$\$U_SHIBB...	
---	-------------------------------------	--	--	---	---	-------------	--	--	---	---

CZUTL EXAMPLES: BASE URL UPDATES

USE
STATISTICS
/ SUSHI

Vote at link below
to improve SUSHI
process!

Uploaded Files

Monthly Usage Data

1 - 6 of 6

File Name

ieee



Status : All Files Subscriber : All Upload Date : All Uploaded Report Type : All Vendor : All SUS

File Name	Vendor	Status	Data Start Date	Data End Date
1 IEEEJR12016.csv	EBSCO	Fully processed	Jan 2016	Dec 2016
2 IEEEJR12017.csv	EBSCO	Fully processed	Jan 2017	Dec 2017
3 IEEEJR12018.csv	EBSCO	Fully processed	Jan 2018	Dec 2018
4 IEEEJR12019JanJun.xlsx	EBSCO	Fully processed	Jan 2019	Jun 2019
5 IEEEETR_J12019JulyDec.xlsx	EBSCO	Fully processed	Jul 2019	Dec 2019
6 IEEEETR_J12020JanJune.xlsx	EBSCO	Fully processed	Jan 2020	Jun 2020

<https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/41002720-specify-time-period-for-sushi-harvests>

FILES TO BOOKMARK

- **2020 Alma CKB Release Notes**
https://knowledge.exlibrisgroup.com/Alma/Content_Corner/Release_Notes/2020_Alma_CKB_Release_Notes
- **Configuring the Validity of EBSCOhost Full Text URLs (AKA EBSCO Link Resolver Plugin)**
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/090Integrations_with_External_Systems/030Resource_Management/230Checking_Full-Text_URLs_with_the_EBSCO_Link_Resolver_Plugin](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/030Resource_Management/230Checking_Full-Text_URLs_with_the_EBSCO_Link_Resolver_Plugin)
- **Post migration clean-up of eResources in Alma**
https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Post_migration_clean-up_of_eResources_in_Alma
- **Eluna Document Repository**
<http://documents.el-una.org/>



FINAL IDEAS

- Prepare for ever-changing workflows as functionality changes often.
- Welcome problem reports and encourage your library staff to report early and often.
- It's a marathon, not a sprint – remember how long you were on your last system before you had it set perfectly and give each other permission to take a few years with Alma/Primo before expecting that level of perfection.
- Be well and take care of yourselves and each other.



THANK YOU AND QUESTIONS?