LINK RESOLVER DATA MIGRATION

Preparing your Data

Alma/Primo VE Background

Alma: a "unified resource management system"

- Designed to manage e-resources as well as physical resources

- Replaces any link resolvers (e.g., SFX) and other e-resource management systems I-Share libraries are using

  - Alma provides integrated electronic resource management (activation, link resolving, storing licenses, etc.)

- Primo VE provides discovery for the library's catalog of physical and electronic resources, as well as consortial resources and resource sharing

A bit about "Zones"

- All customers share access to a "**Community Zone**" that has a central knowledge base that contains metadata for e-resources and details about e-resource packages' content
- CARLI, like many other consortia using Alma, will be implementing a "**Network Zone**" where consortial collections, policies, and more will be able to be managed
- All customers have their own library's inventory (physical holdings), staff users, and local policies in an "**Institution Zone**"

Alma/Primo VE Link Resolver Test Load

Link Resolvers: How prepare for test load?

- SFX (ExLibris)
- 360 Core, 360 Resource Manager (ExLibris)
- EBSCO Full Text Finder
- OCLC WorldShare License Manager

How prepare for the test load - SFX

- SFX – make sure activations of targets/collections are accurate

- CARLI staff will use an ExLibris tool to copy active targets that are GetFullTxt or GetSelectedFullTxt

- Other features like "Ask a question?" or ILL forms will be done directly in Alma/Primo VE after test IZs are set up

- See https://www.carli.illinois.edu/products-services/products-services/link-resolver-sfx/alma_migration to get started on reviewing your active targets/collections

How prepare for the test load - SFX

Examining your Local SFX admin Active Targets

2. Go to your local SFX admin and examine your locally active targets.

Or alternately, you can export a list of active targets to aid examination or to share with colleagues for their input. Go to SFX admin, then to KB Tools □ Export Tool

Targets for Consortially-Licensed Resources: |

Active Targets	Active Services
ALEXANDER_STREET_PRESS_HARPERS_WEEKLY	getFullTxt
EBOOK_CENTRAL_ACADEMIC_COMPLETE	getFullTxt
EBSCOHOST_ACADEMIC_SEARCH_COMPLETE	getFullTxt
EBSCOHOST_BUSINESS_SOURCE_ELITE	getFullTxt
EBSCOHOST_CONSUMER_HEALTH_COMPLETE	getFullTxt

LINK RESOLVER DATA MIGRATION:
360 PRODUCTS

Preparing your Data

How prepare for test load - 360 Products

- 360 Core or 360 Resource Manager
- You must run reports & send to CARLI by July 23, 2019
- For example:
  - Database Details Report
  - Tracked Resources Report or
  - Tracked eBooks + Tracked eJournals

- Get started ASAP by reviewing "ExLibris 360 to Alma documentation":

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

Search under current path 🔍

Alma

360 and Intota to Alma Migration Guide

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Introduction

Ex Libris, a ProQuest company, provides data migration services to Alma from the following 360/Intota suite of products:

- Electronic database and title activations: 360 Core/Link
- ERM: 360 Resource manager (360RM) and Intota
- COUNTER: 360 Counter reports

> **Note** Ex Libris migrates your ERM data only if this service was purchased by your institution and is stipulated in your contract with Ex Libris.

This includes automatic migration of major 360 / Intota elements:

- Electronic activations (databases/e-collections and titles) – 360 Core/Link
- Electronic licenses – Intota/360
- Electronic Vendors, Vendor interfaces and contacts – Intota/360
- Linking key ERM data elements to database/e-collection level e-resources
- COUNTER: Reports described as supported in Managing COUNTER-Compliant Usage Data

This document explains:

- Extraction requirements from 360 / Intota
- Input required by the customer
- Rules and Assumptions about the migration to Alma
- An explanation of the Link Resolver Activation Report

Related Documentation

LINK RESOLVER DATA MIGRATION: **EBSCO & WORLDCAT** PRODUCTS

Preparing your Data

Link Resolver to Alma Activations

◄ Libero to Alma Migration Guide │ Migration File Validation Tool ►

Migrating link resolver systems is performed using an Alma tool for batch-activating electronic resources, based on customer input in an Excel format.

> **Note** Migrating from SFX and 360Link uses a different process and does not use this Local Link Resolver form. See the SFX to Alma Migration Guide and the 360 and Intota to Alma Migration Guide for more information.

The main steps for non-Ex Libris systems:

1. Customer: Downloads an up-to-date ⊞ Excel template. The Excel includes all potential global/CZ-managed electronic collections according to package type: Licensed Aggregators, Free Aggregators, and Selective Aggregators.

2. Customer: Updates the Excel form to indicate the relevant global electronic collection (package) and selective title activations. Ex Libris recommends using your sandbox access to the community zone (CZ) search to help in the matching of your link resolver collection and title names to the CZ version names. Additionally, the particular title list for any package must be provided in the Excel Title tab along with at least one identifier of PORTFOLIO_PID, ISBN, or ISSN in order for the package activations to include any the titles. If the customer institution has multiple activations for the same resource, such as the law library and the main library, multiple forms may be submitted, which will result in double activations.

3. Alma Migration Team: During Alma migration, processes and loads the Excel file to activate e-resources indicated by the customer in the Excel file.

> **Note** The Excel format used in the batch title activation flow described in this document is very similar to the one that can be used for batch activation in Alma for ongoing purposes. The main difference is that the ongoing process handles loading titles for a specific electronic collection, whereas this process handles activating electronic collections and loading all titles in one batch process. This process of batch activating all titles for all e-collections for the library is migration-specific and done only during implementation.

Customer Fills in the Form

Packages

> **Note** In this document, and in the accompanying Excel spreadsheet, the term package is used to mean electronic collection of type package.

How prepare for test load – Non-Ex Libris Products

			N
Internet Library of Early Journals			N
Internet Scientific Publications			N

◄	►	**FREE_PKG**	LICENSED_AGG	SELECTIVE_PKG	TITLES	⊕

eady

ExLibris Alma/ Primo VE Training materials

Section "**Alma/PrimoVE Training & Selected Documentation**"

at

https://www.carli.illinois.edu/products-services/products-services/link-resolver-sfx/alma_migration

Thank you

We are here to assist:
Send questions about link resolvers to
support@carli.illinois.edu