CARLI I-Share

INTRODUCTION TO THE P2E PROCESS

Nicole Swanson & Jen Masciadrelli
June 2019

Agenda

- E-resource integration in Alma
- What is P2E?
- Decisions to make
- P2E report
- P2E scenarios
- What's next

E-RESOURCE INTEGRATION IN ALMA

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**"

DEFINING P2E (PHYSICAL TO ELECTRONIC)

What is P2E?

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.

This webinar will guide you through the decisions you need to make using the P2E Report CARLI provides to create your P2E file for migration.

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.

P2E: DECISIONS TO MAKE

P2E Questions on Migration Form: Links

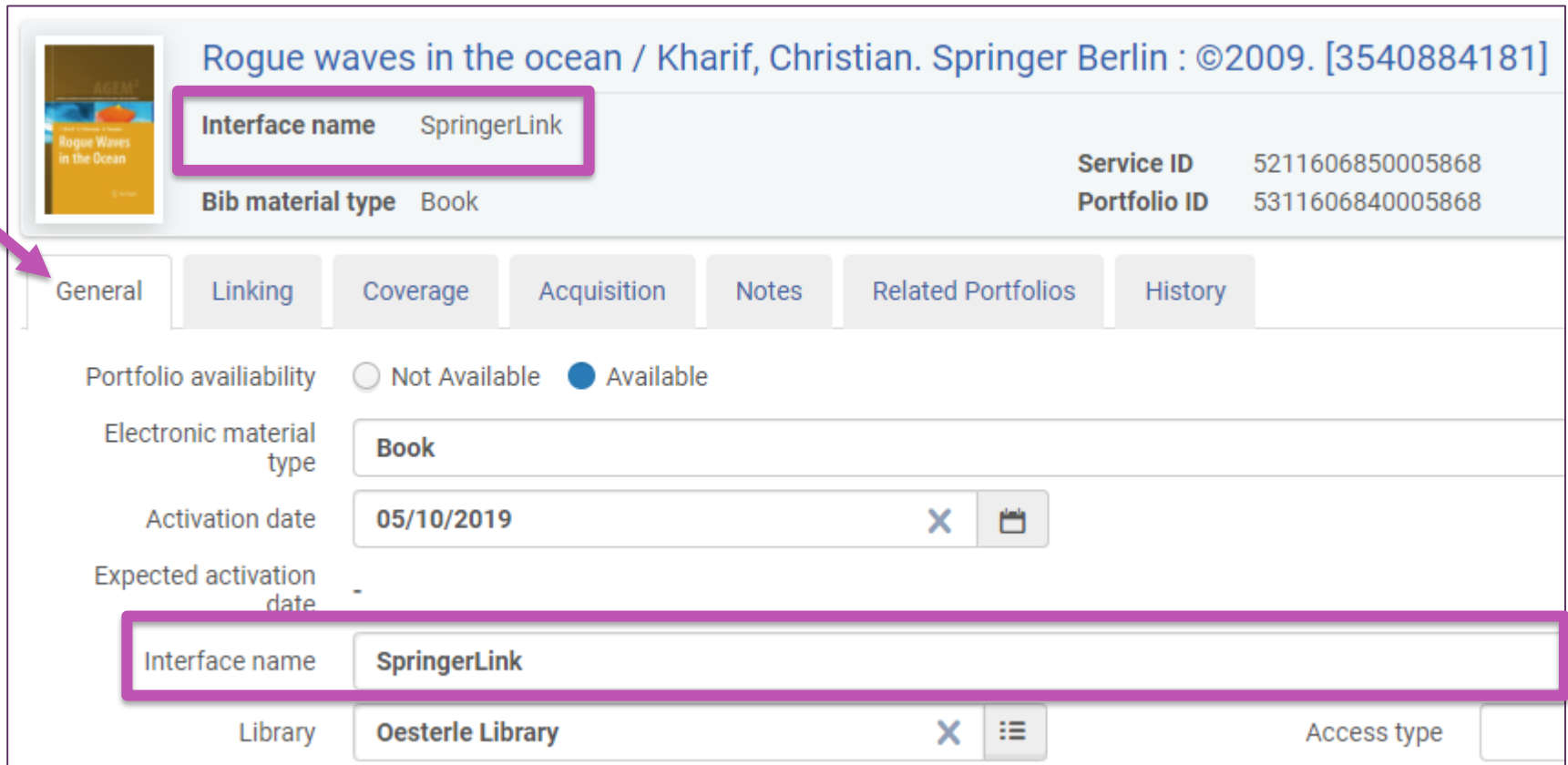| 856 Link Content	
Which Holding or Bib field stores the electronic link?	856 u
Which Holding or Bib field stores the electronic link public note?	856 z?
Which Holding or Bib field stores the electronic provider name information?	856 3?
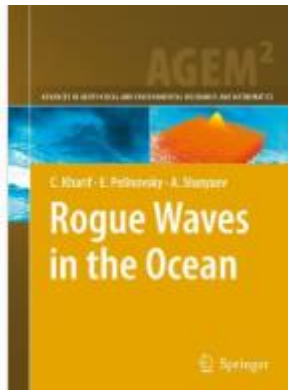
856 40
‡3 SpringerLink
‡u https://login.libproxy.noctrl.edu/login?url=
http://dx.doi.org/10.1007/978-3-540-88419-4
‡z Access for North Central College

856 Data in Alma Portfolio After P2E

856 40 ‡3 SpringerLink

856 Data in Alma Portfolio After P2E

856 ‡u https://login.libproxy.noctrl.edu/login?url=
http://dx.doi.org/10.1007/978-3-540-88419-4

Rogue waves in the ocean / Kharif, Christian. Springer Berlin : ©2009. [3540884181]

Interface name	SpringerLink		
		Service ID	5211606850005868
Bib material type	Book	Portfolio ID	5311606840005868
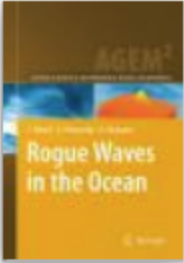
General	Linking	Coverage	Acquisition	Notes	Related Portfolios	History

URL   **https://login.libproxy.noctrl.edu/login?url=http://dx.doi.org/10.1007/978-3-540-88419-4**
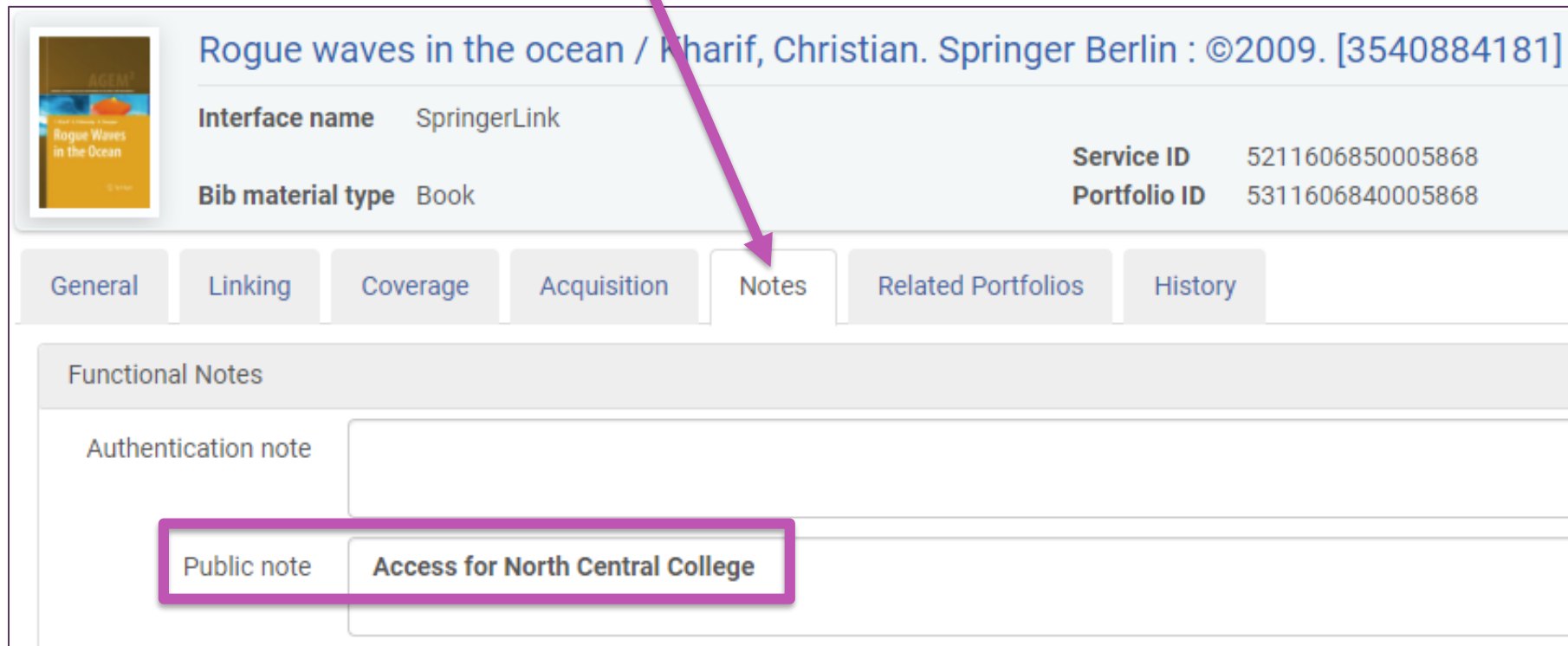
URL type   ● Static URL   ○ Dynamic URL

Static URL   [   ]

Proxy enabled   ● No   ○ Yes

Proxy selected   [▼]

[Test access]

856 Data in Alma Portfolio After P2E

856 ‡z Access for North Central College

856 Data in Primo

P2E Question on Migration Form: Include Suppressed Bibs?

```
Include
suppressed bibs?
        ├── Yes ──── Electronic
        │            resource created,
        │            suppressed
        │
        └── No ───── Migrates as
                     physical record,
                     suppressed
```

P2E Question on Migration Form: Include Suppressed Holdings?

Include suppressed holdings?

Yes → Electronic resource created, NOT suppressed

No → Holdings skipped, electronic resource created from bib

P2E Report indicates if bibs/MFHDs are suppressed and if purchase orders are attached

P2E Questions on Migration Form: Link Resolver Prefix

List the prefix for SFX or other link resolver system record numbers in 035 fields

- 035 containing (SFX), (WaSeSS), etc.

- Skips bibs identified, if electronic location

- Avoids duplication

Avoiding Duplicates

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

P2E REPORT

P2E Report and P2E File

P2E Report assists with your P2E File creation used by Ex Libris to transform your Voyager eResources into active e-resource inventory

- P2E Report now available in Box
    - p2e_xxx.xlsx
    - p2e_nolink.xlsx
- P2E File due **July 9**
- Submit P2E File via Box

P2E Report: File Size

- Excel file size may be large
    - To request the file be split down further, email support@carli.Illinois.edu
    - Rename and save your P2E file edits back to Box if too large to save locally
    - If you anticipate problems with the file size, consult with your local IT before opening

P2E Report: 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
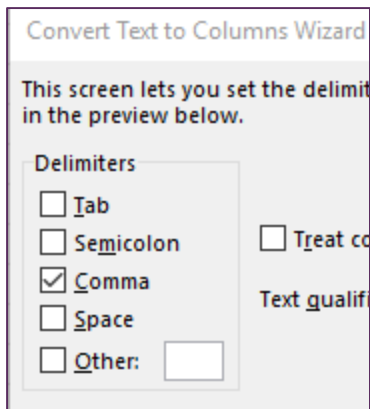
- MFHD ID

- 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
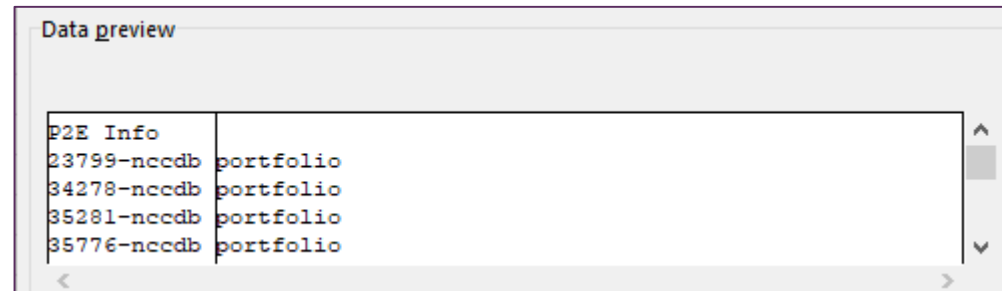
P2E File: What to Include?

Edited P2E Info column submitted as P2E 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

Fine to submit the data back in two columns

Convert Text to Columns Wizard

This screen lets you set the delimit
in the preview below.

Delimiters
- [ ] Tab
- [ ] Semicolon   [ ] Treat co
- [x] Comma
- [ ] Space   Text qualifi
- [ ] Other:

Excel's Text to Columns feature

Data preview

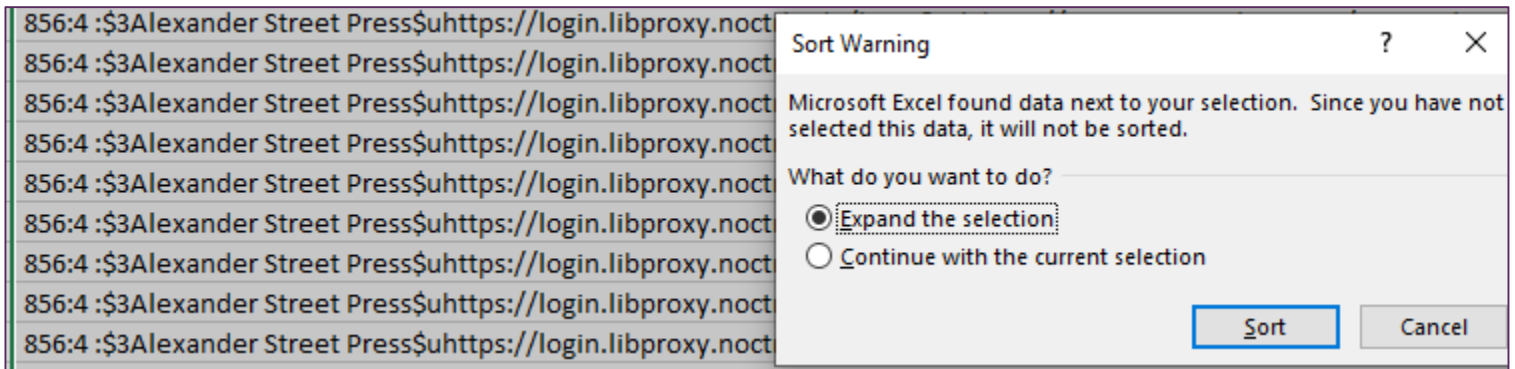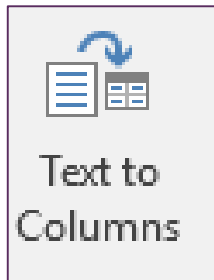| P2E Info	
23799-nccdb	portfolio
34278-nccdb	portfolio
35281-nccdb	portfolio
35776-nccdb	portfolio

P2E Report: Ideas for Review

In Excel:

Data tab - Sort A-Z – Expand the Selection - Sort
to group similar 856 links

P2E Report: Ideas for Review

Data tab - Text to Columns on P2E Info tab

Text to Columns

Then, fill cells with similar text:

(select cells, F2, type text, Ctrl + Enter)

155612-nccdb	portfolio
155613-nccdb	portfolio
155614-nccdb	portfolio
156107-nccdb	portfolio
156108-nccdb	portfolio
157466-nccdb	portfolio
156109-nccdb	portfolio

→

155612-nccdb	package
155613-nccdb	package
155614-nccdb	package
156107-nccdb	package
156108-nccdb	package
157466-nccdb	package
156109-nccdb	package

P2E Report: Ideas for Review

- A Vanguard Approach to the P2E

- OpenRefine

http://openrefine.org/download.html
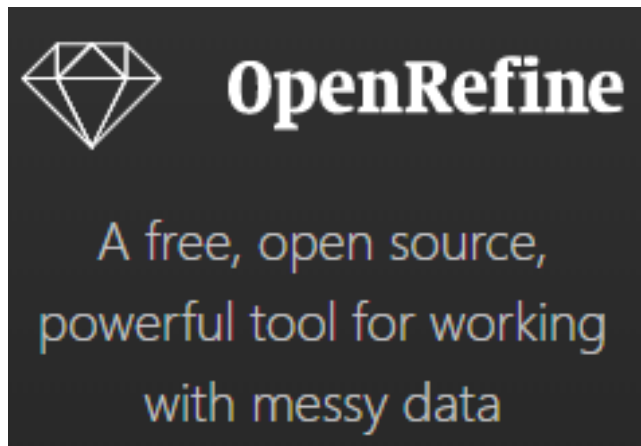
P2E SCENARIOS

P2E Processing

Basics

More about 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

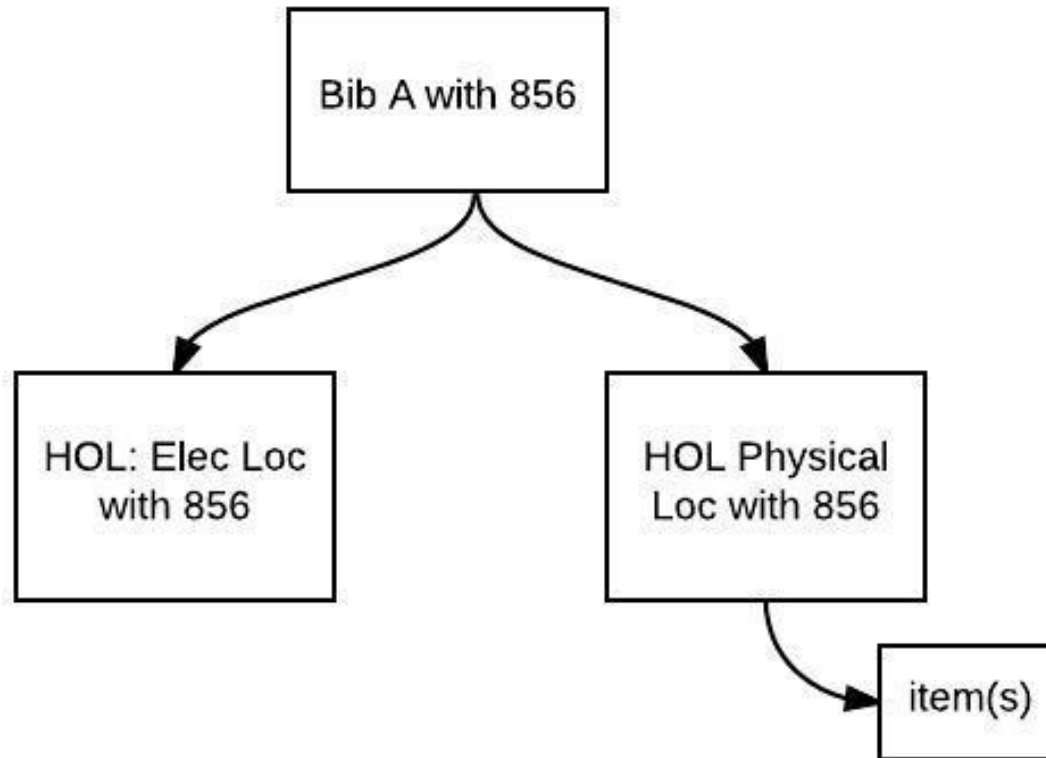# Two holdings containing 856s, one is electronic and one is physical

Image from

Two holdings without an 856, one is electronic, the bib contains an 856
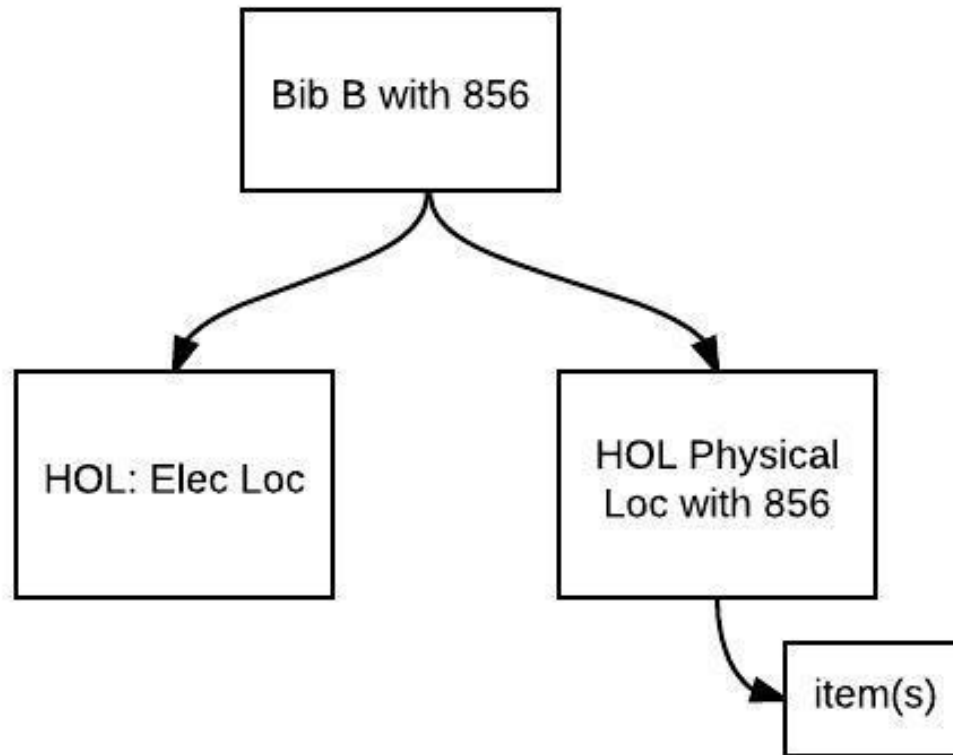
Image from

Bib and Holding with no 856

Bib
without 856

HOL: Elec Loc
without 856
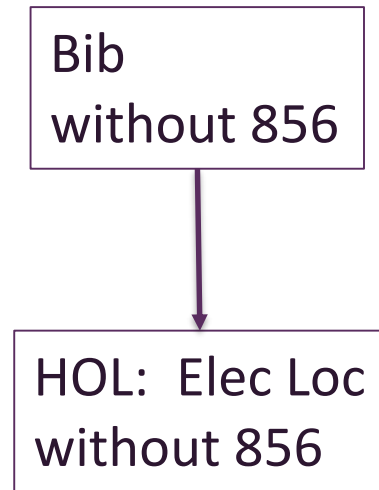
Electronic portfolios ▼   Zone: ● 🏠 Institution   ○ ⛓ Network   ○ 👥 Community

| URL (Electronic Portfolio) ▾ | Contains Keywords ▾ | null |
| AND OR Is Standalone ▾ | Equals ▾ | Yes |

P2E File: Additional Considerations

- What does 856=NOT FOUND indicate in P2E report?

- What happens if electronic bibs identified in the P2E report are removed from the P2E file?

P2E and Purchase Orders

- During the P2E processing the inventory level for the resource is identified. Next the process will check to see if there is a purchase order is associated with the inventory record. If there is an order record, the system converts it to a matching electronic type order.

- There is a hierarchy of which Order record will be converted, starting with the most recent, open order.

- It is important to note that you do not have to have POs in order to do P2E, but if you do have POs associated with the bib records you are running through the process they will be transformed to electronic type orders.

P2E and Purchase Orders

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

WHAT'S NEXT

P2E Resources

- Electronic Resource Handling in Alma Migration

  https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/Electronic_Resource_Handling_in_Alma_Migration

- Migration of Physical to Electronic (P2E) Resources

  https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/Migration_of_Physical_to_Electronic_(P2E)_Resources_in_Alma

- Voyager to Alma Migration Guide

  https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/Voyager_to_Alma_Migration_Guide

Questions?

As always please contact CARLI Support with questions!

support@carli.illinois.edu

Thank you!