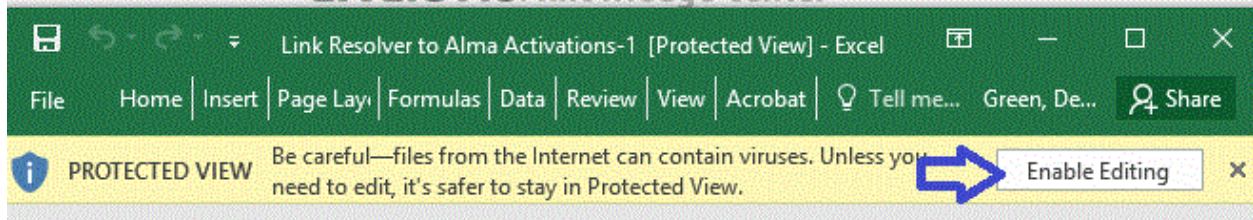


Editing your Institution's "XXX_Link Resolver to Alma Activations.xlsm" Spreadsheet for Production/Cutover

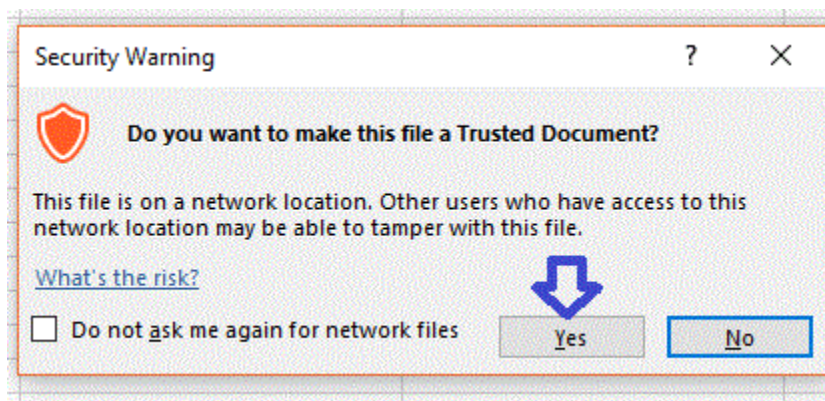
- 1) Use the CARLI supplied blank spreadsheet in your Institution's Box folder "XXX Production Load" named "XXX_Link Resolver to Alma Activations.xlsm" (XXX is your library's three letter I-Share code).

Please note: you must fill out this new spreadsheet. You can use the test load spreadsheet for reference but not in lieu of a newly filled out spreadsheet.

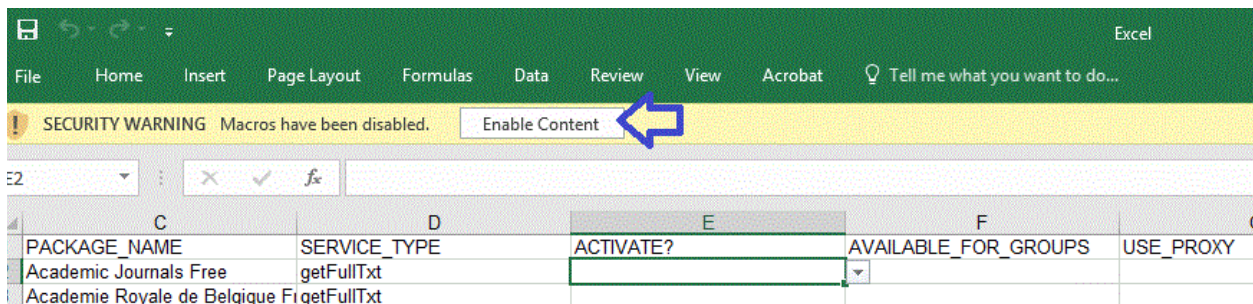
- 2) When you open this form:
 - a. If you get enable protected view message, click "Enable Editing."



- b. If you get a security message, click "Yes."



- c. When you get a warning "macros have been disabled..." click on "Enable content".
NOTE: you must have macros enabled to use the form.



- 3) Save two copies: one as a backup without any changes in case you need to start completely over. Save one as your working copy to start editing.

If asked to save "XXX_Link Resolver to Alma Activations" as a Microsoft Excel macro enabled worksheet. Click Yes.

- 4) The form is easily broken and corrupted. Do NOT move columns or hide columns. Also, do NOT unhide columns A & B that are for Ex Libris staff only. Do not change the order of the tabs/sheets.

You may freeze the top row to keep the column headers more visible but unfreeze before final save and upload.

If you insert rows or columns, remove them before final save and upload to CARLI. If you add any colors or change fonts to help keep track of changes, remove them or revert to original selections for final version. For example: you may add a column to keep track of questions about various collections or to mark how far down the list you are. These are ok as long as you remove the column(s) before final save and upload.

- 5) On each tab, using only drop-down lists, select appropriate Y or BY_TITLES info in "ACTIVATE?" column.

Y = Yes activate in my library's institution zone (IZ) with 100% of titles active

BY_TITLES= will either link package to your IZ or look for titles info on BY_TITLES tab, see below for more info

And if your library purchases/license a package select Y for "yes activate" also select "Y" for Yes USE_PROXY.

	C	D	E	F	G
1	PACKAGE_NAME	SERVICE_TYPE	ACTIVATE?	AVAILABLE_FOR_GROUPS	USE_PROXY
395	JPLA SpringerLink Journals 2017	getFullTxt			
396	JSTOR Arts & Sciences 1 Current	getFullTxt	Y		Y
397	JSTOR Arts & Sciences 2 Current	getFullTxt			

Free/Open Access collections do not require proxy. For that tab, just select "Y" in "ACTIVATE?" column or leave blank if you do not want to activate it in Alma.

- 6) It is not necessary to select "N" for "don't activate." A blank is interpreted as a "N" or do not activate. The packages that are in the CARLI Network Zone are marked "N" to assist your work. You do not have to activate the all CARLI commercial and selected "best of" free/open access resources.

For "BY_TITLES" packages fill out TITLES page with libraries content, if possible.

NOTE: You do not have to fill out all columns on the TITLES page, but you must fill out at minimum the package, ISSN or ISBN and title. Make sure the PACKAGE_NAME matches the PACKAGE_NAME designated "BY_TITLES" on the other tab _exactly_ or the process will not work.

	A	B	C	D	E	F	G	H	I
	PACKAGE_NAME	RTFOLIO	ISSN	ISSN	ISSN	ISBN	ISBN	ISBN	TITLE
	JSTOR Books					9780812215120	9780812200522		Book of Sainte Foy, The
	JSTOR Books					9780252077029	9780252092015		Illinois Politics: A Citizen's Guide

Another option is to leave the TITLES tab blank. During migration, the package will be linked to the institution zone. The package will not be activated and no portfolios (titles) will be activated. Once you receive your Alma environment, you can manually activate BY_TITLES collections and selected titles/portfolios to which you subscribe. You can either open the collection/package in Alma and select each title one by one or use a batch loading method to activate selected titles/portfolios using a list of ISSNs or ISBNs.

7) As noted in step 4: Change any font/color edits back to defaults. Unhide any columns you hide and delete any extra columns or rows added. Unfreeze top row if frozen. Then save as Microsoft Excel macro enabled worksheet.

8) Upload to your CARLI libraries box.com folder.

For more information:

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