

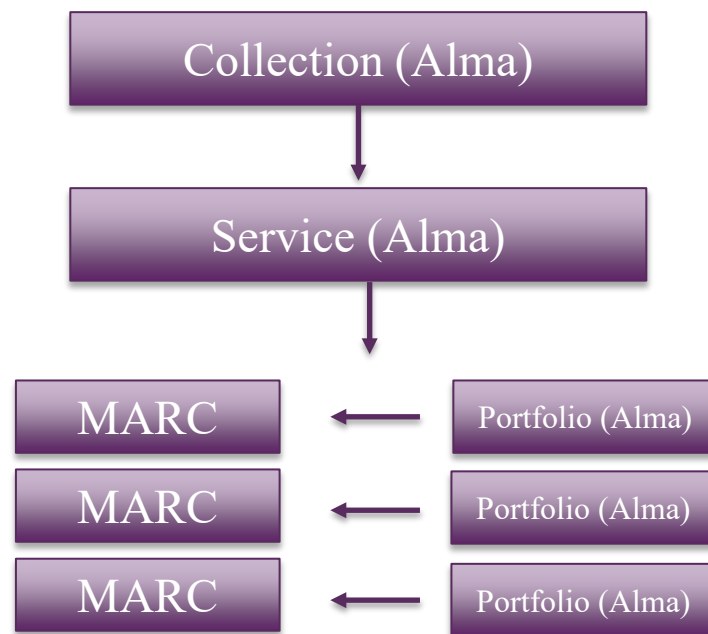


CARLI

TECH SERVICES Q&A  
EBOOKS IN ALMA  
DECEMBER 15, 2020



- Focus on adding new titles.
  - We've talked a lot about P2E resources and want to focus on the newly acquired resources your library is adding.
- Fundamentally ebooks in Alma are managed differently
  - Ex Libris Documentation – Describes workflows and how to manage eresources but...
  - CARLI receives many questions about ebook cataloging – today we want to talk about **why** you should manage your ebooks differently in Alma.
- Ultimately CARLI would like to have some best practices for ebooks in our new Alma environment.



- Where should my MARC record come from?
- Where should my MARC record go?
- How and Why should I organize my MARC records for ebooks in Alma?

## Where can you get your MARC records?

- Community Zone
  - Is the CZ Collection Metadata quality acceptable?
- Vendor
  - Is the vendor metadata quality acceptable?
- OCLC



- Quick Refresher. CZ includes:
  - Bib records for electronic resources (collections, databases, titles)
  - Central knowledgebase (CKB) of e-resources (coll, db, portfolios)
  - Data updated regularly by Ex Libris, Alma Community, Vendors.
- Start cataloging (or acquisitions) by searching CZ
  - Locate the title and the collection (e.g., platform and provider)
  - Activate the collection
  - Portfolios already exist for many resources, some in many collections
  - Activate (~ cat) or Order (~ acq + cat) the portfolio

## Why select bibs from a source besides the CZ?

- If you determine that the CZ records are not sufficient
- If the CZ does not yet include the collection or provider of your resources
- Familiarity of bibs from OCLC Collection Manager / vendor

## Options

1. Import bibs and create portfolios via import profile
  - a) Load to IZ, create portfolios as part of a collection
  - b) Distinct import profile for each collection
  - c) May also link to CZ-CKB data, but use imported bib
2. Import single bibs to IZ, manually select/create portfolios

Remember the “Cataloging Electronic Resources...” recommendations? Some new developments:

- In Alma, URLs go in portfolios
- Primo VE optimized for portfolio display
- Better realization of provider-neutral representation

So what data for ebooks should be in bib records?

- The obvious: description and access points
- Less obvious
  - Institution-specific URLs in 956
  - Shareable URLs in 856
  - Other institutions' URLs removed



Data on your institution's electronic resources => your IZ

- If selecting CZ data, Alma saves to the IZ
- If importing bibs from vendors, import to the IZ
  - More control over portfolio creation at import
  - More control over record reloads/unloads
  - Vendor data (i.e., non-OCLC data) should not be in the NZ
- If importing ebook bibs from OCLC, import to the IZ
  - More control, as above
  - No collision with other libraries' Collection Manager loads
    - Bibs don't become a collection of other libraries' 856s







- Ebooks in the Network Zone are more practical for Collections managed at the Consortial Level or by groups of libraries.
- Some import processes need more exploration
  - Normalization runs after portfolio creation
  - Need to evaluate timing and effect of match actions on portfolio creation



- Collections create groups of records, as such, those groups will be easier to manage.
  - Easier to associate with licenses and other ERMS aspects of records (e.g. usage data)
  - Service Level is apparent with Collection
    - Manage Proxy across all resources
    - Manage description of full text resource
  - If you use local Collections you can use them to distinguish resources you've purchased at different times.
  - Improved display in Primo VE
  - Even if you are purchasing titles individually (selective rather than aggregator), you should still add them to a collection.



<https://www.carli.illinois.edu/products-services/i-share/electronic-res-man/p2e-cleanup>

- Recommendations include:
  - Delete duplicate portfolios
  - ★ Group ILS Migrated portfolios into local collections to make them easier to manage
  - ★ Link ILS migrated portfolios to CZ collections but retain ILS migrated bib records



# Don't Panic





00:10:13 Holly Nordheden: Good morning everyone!

00:11:20 Holly Nordheden: That's what so frustrating about trying to use the Ex Libris resources!

00:17:17 Jodi Craighow: We have a robust ILL department -- how does that square when many/most CZ records don't have OCLC numbers attached?

00:17:18 Laurie Sauer: Holly--In my experience that's every piece of technical documentation I've ever seen!

00:24:48 Holly Nordheden: Slightly off topic, but 856 URL's (like table of contents notes, etc. from DLC) can stay in the bib record now instead of moving to holdings record?

00:30:11 Jolanta Radzik (JJC): Will CARLI be moving institution specific URLs from 856 to 956 for each institution? Or is this something we have to do it on our own?

00:32:58 Elaine Fetyko Page: Would eRead Illinois be one of those collections that might be created/maintained in the NZ?

00:34:09 Jodi Craighow: Sometimes we're able to make printouts of chapters from our ebooks.

00:34:50 Laurie Sauer: But aren't our holdings for ebooks set in OCLC? That would determine holdings for ILL purposes, right?

00:34:55 Denise D Green: Perhaps ISBNs can assist with OCLC matching.

00:36:40 Mary Konkel: If you use the OCLC Gateway process, you set your holdings manually as you would catalog any other format.

00:36:56 Andrea: We haven't done this but isn't it possible to integrate Illiad and Alma so that you would be able to view all your resources in ALma, even the ebooks without OLCC numbers, to determine if you can fulfill a request via Illiad.

00:37:16 Laurie Sauer: What amount of CZ records are we talking about that do not have OCLC numbers?

00:37:37 Laurie Sauer: Andrea, et all--true for Tipasa too?

00:37:41 Jodi Craighow: We use Tipasa, and we're making the switch to RapidILL, so we're concerned about having correct matching so that we don't miss deadlines.

00:37:52 Mary Konkel: E-resource cataloging doesn't have to be different than any other cataloging, other than you DON'T create MFHDS, but instead create a portfolio and link it to the appropriate electronic collection.

00:38:23 Jodi Craighow: Good to know -- thanks!

00:38:51 Laurie Sauer: What amount of CZ records are we talking about that do not have OCLC numbers?

00:39:06 gporter: What if you already have the portfolio or some portfolios from a CZ e-collection in your IZ--will the ""Activate" action in CZ create a duplicate portfolio in your IZ? Does Alma warn you before you import a duplicate portfolio from CZ to your IZ?

00:40:08 Russell Kracke: Are the 956 URLs something that CARLI has decided to do on its own, or is this something suggested by Ex Libris or have other institutions used this field, too?

00:40:34 Lisa Wallis: Yes, @gporter, Alma does warn you

00:40:53 Mary Konkell: Using the OCLC Gateway process also ensures that you have OCLC numbers for your individually purchases ebooks AND you can edit less than stellar/brief records by copy/pasting from the physical copy, which most of the time exist already in OCLC -- all at the same time.

00:41:21 Brent Eckert: I don't understand why you would move an 856 to a 956 instead of just putting it in the portfolio.

00:42:19 Holly Nordheden: Sorry, I meant 856 for physical items

00:43:41 Jolanta Radzik (JJC): Thank you.

00:44:39 Elaine Fetyko Page: Hurray!

00:45:54 Gloria: What was the Overdrive collection that Ted mentioned?

00:46:34 Ruth Lindemann: The overdrive collection is a group collection several community colleges have acquired through NILRC.

00:46:46 Gloria: Ok, thank you!

00:49:59 Denise D Green: NILRC see <https://nilrc.overdrive.com/>

00:51:17 Tammie Busch (she/her/hers): I recently created an IZ collection of online CRDP records and portfolios we've received from MARCIVE. I keep this collection updated with the monthly new online and changed online records I receive. Is this something I should share to the CZ?

00:52:23 gporter: Ted talked about the CARLI-provided ebook collections being activated in the NZ in the future.. Should each institution activate these ebook collections in their IZ?

00:52:53 Jessica Gibson: Editing CZ Bib Records:  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/040Metadata\\_Management/120Contributing\\_to\\_the\\_Community\\_Zone\\_%E2%80%93\\_Bibliographic\\_Records#Editing\\_Community\\_Zone\\_Bibliographic\\_Records](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/040Metadata_Management/120Contributing_to_the_Community_Zone_%E2%80%93_Bibliographic_Records#Editing_Community_Zone_Bibliographic_Records)

00:53:12 Denise D Green: Cataloging Records Distribution Program (CRDP)  
<https://home.marcive.com/blog/cataloging-record-distribution-program-crdp/>

00:53:14 Sharon Nelson: e purchased ebook records from Cassidy Cataloging that are in most cases superior to CZ records for the same title. Our license doesn't allow using the Cassidy records outside our institution. Can we suppress the CZ record in our IZ so the better Cassidy record appears to

patrons? Or is this taken care of by the "linking" between CZ records and IZ records you mentioned earlier?

00:54:09 Tammie Busch (she/her/hers): Thanks, that's what I was thinking!

00:54:26 Ashtin Trimble: Are the new Oxford and Wiley collections in the NZ? We are still struggling with how to get our users to these collections via PrimoVE.

00:55:01 Ruth Lindemann: Ashtin, I'd be interested in hearing about that too.

00:57:48 Theodore Carl Schwitzner: CZ editing:  
[https://knowledge.exlibrisgroup.com/Alma/Best\\_Practices\\_and\\_How-Tos/Electronic\\_Resources\\_and\\_the\\_Community\\_Zone/Community\\_Zone\\_\(CZ\)](https://knowledge.exlibrisgroup.com/Alma/Best_Practices_and_How-Tos/Electronic_Resources_and_the_Community_Zone/Community_Zone_(CZ))--See specifically the powerpoint on "Contributing to and Contributed By in the Alma Community Zone.pptx"

00:57:52 Liz Hollendonner: Does anyone have any experience with Omnigraphics ebooks for the physical books you've purchased?

00:58:04 Ruth Lindemann: Is there a list of those titles so I can see whether or not they are active?

00:58:46 Ruth Lindemann: That would be great, thanks. :)

01:01:40 Sharon Nelson: These Cassidy records are already in Alma, so sounds like we will need to do the manually re-link (Xmas project :-)) - thank you!

01:01:53 Liz Hollendonner: Yes.

01:02:22 Denise D Green: I'm not familiar with them either

01:02:26 Elaine Fetyko Page: That's a similar situation with Grey House/Salem Press books. I've been able to find the ebooks in the CZ for the most part

01:02:30 Liz Hollendonner: I will do that. Thanks!

01:02:43 Jennifer Masciadrelli: [techservices-ig@carli.illinois.edu](mailto:techservices-ig@carli.illinois.edu)

01:02:53 Denise D Green: Oh you mean you buy the physical book and they then allow access to the e-book version too?

01:03:00 Amanda Pippitt (she/her): Denise- yes

01:03:07 Brent Eckert: for Omnigraphics I've simply imported bibs for the ebooks in OCLC and created standalone portfolios. But this is probably not the best practice.

01:03:22 Theodore Carl Schwitzner: To subscribe or manage your list subscription:  
<https://carli.illinois.edu/mailman/listinfo/techserv-ig>

01:03:36 Cindy Bowen: I've used OCLC bibs for our Salem titles like this, and have a local collection for those

01:06:23 Raeann Dossett: Link to those instructions, please?



01:06:45 Laurie Sauer: A nice feature I discovered about managing e-collections is that you can add notes in the service level that appear for each e-item in the collection, rather than add a note to each portfolio.

01:10:03 gporter: Yes I've seen the Carli-provided collection titles in a catalog search--I expect it was via the Everything search. Then it becomes a library instruction issue to make sure users know to choose that type of search to access those collections if not defaulted to that type of search-- it depends on how the search is configured in PrimoVE.

01:10:17 Mary Konkell: And it's easy to add a standalone portfolio to an electronic collection at the same time you are creating the portfolio--- it's a menu choice.

01:10:52 Mary Konkell: In addition, you can also test the link-- another menu choice.

01:11:12 Cindy Bowen: yes, so helpful!

01:11:51 Jessica Gibson: P2E Cleanup page: <https://www.carli.illinois.edu/products-services/i-share/electronic-res-man/p2e-cleanup>

01:14:17 Lori Thompson: Yes, Jen, I would like that too

01:15:49 David Stern: Can we watch you add one item from the CZ to an IZ?

01:18:06 Jessica Gibson: Add I-Share Results to "Everything" Search in Primo VE:  
<https://www.carli.illinois.edu/products-services/i-share/discovery-interface/searcheverything>

01:18:56 Jennifer Masciadrelli: Clean up and change proxy settings doc:  
[https://knowledge.exlibrisgroup.com/Alma/Knowledge\\_Articles/Post\\_migration\\_cleanup\\_of\\_eResources\\_in\\_Alma#Remove+proxy+prefix+from+P2E+portfolio+URLs](https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Post_migration_cleanup_of_eResources_in_Alma#Remove+proxy+prefix+from+P2E+portfolio+URLs)

01:21:58 Denise D Green: Ted has roles /user permissions for Electronic Inventory Operator & Electronic Inventory Operator Extended. If you are ordering, you'll need appropriate Acq roles. If editing record, possibly Cataloging roles.

01:22:34 Rachel Park: Do you have any sense of how important it is that POLs are attached to activated records and portfolios? If we have POLs that are attached to suppressed bib records, is it important to transfer those POLs to active bibs and portfolios?

01:23:15 Laurie Sauer: "create e-activation task" is a mystery to me. What happens here?

01:23:58 Frances Whaley: Making sure I understand - So as long as a collection or a portfolio is in our IZ we can make edits and the changes will display in our catalog, without affecting CZ or NZ, right?

01:26:11 Frances Whaley: Perfect. Thanks.

01:26:31 Carol: Could you show where that is again under edit?

01:26:51 Carol: Thanks.

01:27:57 gporter: Q re: technical details: How to choose the Access Type for titles we bought: 1. Current 2. Perpetual 3. Both. OR are these just for PDA titles?

01:29:00 Denise D Green: Laurie- the e-activation task list can do several different things. You can use it to deactivate, delete, assign to a co-worker, etc. Partly explained in section "Tasks in the Task List" at [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/050Inventory/020Managing\\_Electronic\\_Resources](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources)

01:29:23 Laurie Sauer: Thanks Denise!

01:30:22 Rachel Park: This would be for resources we are still using and have access to.

01:30:24 Denise D Green: Get to task list by clicking on the clipboard icon in upper right corner of Alma.

01:31:04 Rachel Park: Wondering if it has implications for Analytics maybe?

01:32:30 Rachel Park: Thanks!

01:35:27 Carol: It's under General I think?

01:35:50 Carol: Or not. :)

01:38:13 Mary Konkel: Notes are also a great place to put the particulars about licensing, expiration dates, et.

01:38:45 Lori Thompson: Super helpful. I have gleaned much today!

01:38:52 Mary Konkel: I am mostly talking about individual purchased items

01:39:01 Laurie Sauer: Thanks!

01:39:10 Rachel Park: Thank you!

01:39:12 Cynthia: THANKS !!

01:39:15 Frances Whaley: I'd love a session on that ERMS, Jen.

01:39:22 Lauren Noel: Thanks so much! And thanks for recording these sessions for future reference!

01:39:25 Sarah Kurpiel: Thank you!

01:39:27 Liz Hollendonner: Thanks for sharing!

01:39:28 Russell Kracke: Very helpful, thank you!

01:39:34 Megan Ruenz: Thank you! So helpful!

01:39:36 George Woolsey: Many thanks Ted and Jen

01:39:36 Jolanta Radzik (JJC): Thank you! Very helpful!

01:39:37 Jodi Craiglow: Thanks! You, too!

01:39:37 Bill Schultz: Thanks!!

01:39:39 Cynthia: Thanks!

01:39:42 Sharon Nelson: Thank you and happy holidays!

01:39:44 Kate Hartman: Thanks!

01:39:44 bkaylin:thank you.

01:39:45 Elaine Fetyko Page: Thank you!

01:39:47 Lynn M:Thanks

01:39:47 Bryan Hinds: Thanks!