

Creating Electronic Portfolios Missed During Migration

Welcome to this training session on creating electronic portfolios for bibliographic records that were missed during Migration.

During your migration to Alma, you submitted a Physical-to-Electronic file -- a P2E -- to create electronic portfolios that would be associated with bibliographic records of electronic items in your legacy ILS. Your discovery service, such as Primo, pulls linking information from the electronic portfolio rather than the 856 field in the bib record.

However, if any migrated bib records were accidentally omitted from the P2E file, then they aren't associated with the appropriate electronic portfolios, and they won't have linking information. And without that linking information, there is no Online Access in your discovery service.

In this session, we will show you how to export the bibliographic records from Alma, and then re-import them with an Import Profile that will create the necessary electronic portfolios.

—

First, you need to find the bib records that were missed by the P2E file. The search criteria you use will vary based on your cataloging practices in your legacy ILS, but hopefully the examples shown here will help you find them.

Let's say you cataloged e-resources in your legacy ILS in a fake physical location, such as "INTERNET" or "ONLINE." Use the Advanced Search tool to do a Physical Items search, on the Holdings level, choose Permanent physical location, Equals. Then in the location field, enter the fake location from your legacy ILS. Any results from this search are ones you need to fix.

Or perhaps your institution cataloged e-resources in your legacy ILS as standalone bibliographic records. In that case, use the Advanced Search for an All Titles search, and then select Has Inventory, Equals, No. Add a row of search parameters, and select Originating System, Equals, ILS. You can add a third row of search parameters for Electronic location and note, Contains keywords, http*. The results of this search are the bibliographic records that have 856 fields and originated in your ILS but don't have any inventory.

No matter which search you used, create a set by clicking Save Query, and give this new set a name that will help you find it later, like Bibs that Need Portfolios.

Now you need to export that set of bib records that don't have e-resource portfolios. On the Admin menu, select Run a Job. Find and select the job called Export Bibliographic Records. Choose the set of bib records you just saved. On the Task Parameters page, change Physical format to Binary, which will give you an mrc file. Output format should be MARC21 Bibliographic. For number of records, choose one file, and then for Export into folder, select Institution. Leave the rest of the fields blank and go to the next page. Confirm your selections, and then click Submit.

When the job is done, it will appear on the Monitor Jobs page on the History tab. Use the row-action menu to select the Report. Click the Link to Exported records, and then use the row-action menu to download the mrc file to your computer.

Now you need to create an Import Profile to bring those records back into Alma, but this time with portfolios. In the Resources Menu, choose Manage Import Profiles. Click Add New Profile, to start the Import Profile Wizard.

Select Repository Profile. Give the Import Profile a name, like "Import Missing P2E Portfolios," and add a description if needed. The originating system was Alma, but that's not on this list, so choose Other. You'll be uploading the file, and the Physical source format of that file is binary. The encoding format is UTF-8. The source is MARC21 Bibliographic format, and so is the target. You don't need to change anything else on this page, so click Next.

You won't filter out data, but in Normalization, correct the data using Marc21 Bib normalize on save.

On the next page of the Import Profile Wizard, select No, and then make sure the Match Method is 001 To MMS_ID, because the 001 field in the file exported from Alma will have a perfect match.

For Upon match, select Merge. The Merge method should be Keep only old value.

Leave the other selections on the default, but Upon no match, do not import, because all the records already exist in Alma.

All of the Management Tags settings can stay on the default option.

For Inventory Operations, change the setting to Electronic. For the Portfolio type, choose Part of an electronic collection. Choose the Electronic Collection. Select Multiple portfolios. Extract portfolio information from field 856.

Extract access URL from field 856, subfield u. Leave the rest of the fields blank unless you want to extract Note fields from the bib records and put them in the portfolios. At the bottom, select Activate resource, so you don't have to do that manually later. Then save the Import Profile.

Now, it's time to import those records. On the Import Profiles list, find the profile you just created, and select the row-action Run. Select the mrc file you downloaded to your computer. Add a label and note if you want, then click Add. Finally, click Submit. This will create the portfolios.

Once the import is complete, check back in your discovery service. You should now have online access for these titles.

If you had physical inventory (that is, holdings or items) in a fake physical location, such as ONLINE or INTERNET, you will want to remove that inventory. Choose the Admin menu and select Run a Job. Find and select the job called Withdraw items. Find and select the set you created back at the beginning that was made from the search of Physical Items where the Permanent Physical Location was that fake location. For Task Parameters, you want to Delete holdings; suppress bibliographic records that have no other holdings from publishing. The rest of the options can remain unchecked. Confirm the settings and click Submit.

When the job is done, the holdings and items in the fake location will be gone. And once that is done, you can remove the fake location from your Alma configuration, because it is no longer needed.

When you withdrew the items, you also suppressed the bib records. Now you need to unsuppress them, so that they will be discoverable. Open the Admin menu and select Run a Job. Search for Suppress. Select the job Suppress bib records from discovery. Select the set you made at the beginning of this process. In our case, Bibs that need portfolios. For the question Suppressed from Discovery? Select "false". Review and submit the job. This will unsuppress the bib records.

To review:

First, you create a set of bib records that were missed by your P2E file.

Next, you export those bib records

And then you reimport them with portfolios.

If there is inventory, remove it,

and unsuppress the bib records.

And that's how you can create electronic portfolios that were missed during migration to Alma.