High Level Migration Scope

Ex Libris must have ssh access to your SFX instance and an SFX minimum version of SFX 4.1.2 (Nov 2012 version of SFX or later).

Inventory

- Globally managed, active entities (these will automatically be linked to the Central Knowledge Base within the Alma Community Zone):
  - Targets
  - Target Services (Full Text, Selected Full Text). For more information, see the Other SFX Services section on page 13.
  - Object Portfolios/Objects (serials, monographs)
- Locally managed, active/inactive entities (these will be locally managed institutional level electronic inventory resources):
  - Targets
  - Target Services
  - Object Portfolios/Objects

Overview of SFX to Alma Migration

The purpose of this document is to explain the following:

- An Overview of the scope and terms related to migrating SFX to Alma
- The input or information that you will need to supply to Ex Libris regarding SFX migration to Alma.
- The rules and assumptions that will be applied to the SFX data upon migration to Alma

Prerequisite: basic knowledge of Alma and SFX key concepts and architecture.

A few key terms to understand SFX in Alma terms:

<table>
<thead>
<tr>
<th>SFX</th>
<th>Alma</th>
</tr>
</thead>
<tbody>
<tr>
<td>Targets</td>
<td>Packages</td>
</tr>
<tr>
<td>Target Services</td>
<td>Package/Portfolio Services</td>
</tr>
<tr>
<td>Object Portfolios</td>
<td>Portfolios</td>
</tr>
</tbody>
</table>
Some Key Definitions:

- **CKB/CZ** – Central Knowledge Base of E-resources. Managed by Ex Libris in the CZ and includes info on the different e-offerings available from data providers including linking and coverage information as well as bibliographic enhanced CONSER records Journal titles. E-books being considered.

- **E-Titles (Inventory)** – An electronic resource (e.g. e-journal =Science, e-book=Harry Potter and the Deathly Hallows). Titles include a link to the e-inventory (portfolio or stand-alone – see below) and to the Bibliographic record (in CZ for CZ/Global portfolios or to local Bib for local portfolios and stand-alones).

- **Package (Inventory)** – A collection of electronic portfolios from a specific data provider - includes provider name, package name, services supported by the package and admin/access info. Can be local or global. Global bibliographic records are harvested as suppressed and are not published unless you unsuppress them. Types: Aggregator and Selective. Analogous to SFX target.

- **Package Service** – The particular services a package offers in any of its portfolios (e.g. full text, etc.). Analogous to SFX Target service.

- **Title Package Service** – The service a particular individual title instance offers within a package.

- **Portfolio (Inventory)** – The specific coverage, services and link information relevant for a particular title within a package. May include admin/access info. May be local or global. Analogous to SFX Object Portfolio.

- **Stand-alone (Inventory)** – A local electronic resource not part of a package that is purchased alone and has its own specific linking info and is currently not managed from the Community Zone - often just a URL.
Institutes, Default Institute, and Available For groups

By default, the SFX migration extracts data for each institute defined in your instance, including all activations that are available for each institute via SFX groups, default SFX institute, or specific activations for that institute.

When you migrate to a single institution in Alma, each institute’s activations plus the default activations are loaded to your single Alma institution. For institutes which are not the default, the institute name is mapped into the Available For (AF) group for the resource. Resources in the default institute do not have an AF group assigned, but if you would like the default institute’s resources to have an AF group in Alma, you may inform the migration analyst what the AF group name should be in the SF case.

In order to have the institute name (and the AF group for the default institute if you provide it) saved and assigned in Alma, the AF groups must be turned on in the Inventory Management Groups configuration area.

Available For Groups are assigned in Alma at the service level.

Considerations for multiple institutes

When multiple SFX institutions from the same SFX server are exported and then loaded into a single Alma institution, the default institution is included with each institute’s export. As a result, the resources from the default institution will be migrated/activated as many times as you have SFX institutes. For large consortia sharing a single SFX instance, this may result in very many duplicate activations from the default institute. If you have very many institutions, you may choose to not include the default activations in your export, and load the default activations with the Non-ExL Link Resolver instead.

When migrating to separate institutions in Alma, the activations from the different institutes plus activations from the default institution in SFX are loaded to each separate Alma institution. The default institute activations are duplicated for each Alma institution, and are loaded along with the SFX institute activations.

SFX Data Elements

The following is a list of data elements that are converted from SFX. For more information on these elements, see the SFX General User’s Guide.

TARGET > PACKAGE

- Target internal name
- Global public name
- Local public name
- Global threshold
- Local threshold
- Indication of which threshold is active
- Character Set
• Aggregator
• Authentication note
• General note
• Internal note
• Indication if the target is a local target
• Institute information- public name

TARGET SERVICE > PACKAGE SERVICE

• Service
• Global public name
• Local public name
• Site down
• Site down date
• Site down reason
• Is free
• Global parser
• Local parser
• Global parse param
• Local parse param
• Linking param
• Linking value
• Autoactive
• Autoupdate
• Use proxy
• Crossref supported
• crossref disabled
• Linking param
• Linking value
• Authentication_note
• General_note
• Internal_note
• Indication if the target service is a local target service
• Institute information- Public name, Auto active, Proxy, Local threshold, Linking parameters, Linking values

OBJECT PORTFOLIO > PORTFOLIO

• Object
• Global parser
• Local parser
• Global threshold
• Local threshold
• Indication of which threshold is active
• Global parse param
• Local parse param
• Linking param
• Linking value
• Proxy
• Authentication note
• General note
• Internal note
• Indication if the portfolio is a local portfolio

LOCAL OBJECT > BIBLIOGRAPHIC

• Type
• Language
• Identifiers
• Titles
• Authors
• Publisher information (date, place, name)
• Indication if it is a local object
• Institute information- Proxy, Local threshold, Linking parameters, Linking values, Site down

Areas/Fields Not In Scope

• Active Target services which are TOC/Abstract
• Inactive Global Targets/Target Services/Portfolios/Objects
• Local target parsers
• Local e-inventory material type
• Multiple proxies per institution

Other SFX Services

Many of the services not migrated are implemented in Alma differently than in SFX. Others can be leveraged from Primo. The following table describes the SFX service types and their equivalent functionality in the Alma/Primo solution.

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Leveraged in Alma/Primo</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full text / Selected Full text</td>
<td>Alma</td>
<td>Migrated and leveraged by Alma, similar to SFX resolution.</td>
</tr>
<tr>
<td>Service Type</td>
<td>Leveraged in Alma/Primo</td>
<td>Details</td>
</tr>
<tr>
<td>---------------------------------------------------------</td>
<td>-------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>A-Z list (e-journals)</td>
<td>Primo</td>
<td>A-Z list in Classic primo: for more information, refer to <a href="#">Journal Search</a>. In Primo VE, use Journal Search: see <a href="#">Configuring Journal Search in Primo VE</a>.</td>
</tr>
<tr>
<td>Document Delivery</td>
<td>Alma</td>
<td>Document delivery is offered as part of U-resolver services and is based on fulfillment policy. For more information, refer to the Alma online documentation.</td>
</tr>
<tr>
<td>Search/link to external provider targets (e.g. Google Scholar, Amazon book review)</td>
<td>Primo</td>
<td>Part of core Primo configuration options. For more information, refer to the <a href="#">Primo Back Office Guide</a>.</td>
</tr>
<tr>
<td>Availability to Primo Central / Google Scholar</td>
<td>Alma</td>
<td>Part of the Alma publishing processes.</td>
</tr>
<tr>
<td>Citation / End Note / Ref works</td>
<td>Primo</td>
<td>Part of the core Primo configuration options. For more information, refer to the <a href="#">Primo Back Office Guide</a>.</td>
</tr>
<tr>
<td>DOI resolution</td>
<td>Alma</td>
<td>U-resolver services offer DOI resolution. For more information, refer to the Alma online documentation.</td>
</tr>
<tr>
<td>Citation link builder service</td>
<td>Primo</td>
<td>Part of the core Primo configuration options. For more information, refer to the <a href="#">Primo Back Office Guide</a>.</td>
</tr>
<tr>
<td>All non-full text/TOC/abstract/document delivery services</td>
<td>Alma</td>
<td>Alma general electronic services allow generic linking. Primo configuration also has various external linking options.</td>
</tr>
<tr>
<td>Data Loader/Export tools</td>
<td>Alma</td>
<td></td>
</tr>
<tr>
<td>Collection tool</td>
<td>Alma</td>
<td>Allows the library to determine the level of overlap in packages to which it subscribes.</td>
</tr>
<tr>
<td>Statistics</td>
<td>Alma</td>
<td>As part of Alma Analytics</td>
</tr>
</tbody>
</table>