

## KBART E-resource activations

Ex Libris supports migration of e-resources from KBART, a format used by Springer. The information directly provided by KBART is not enough to load into Alma, so customers must manipulate the KBART data prior to submitting for migration processing.

### Overview for migrating from KBART:

1. Customer: Export records from KBART.
2. Customer: Modify the KBART export file in Excel to include all of the columns as described in the chart below. The most important new column is the e-collection name in Alma.
3. Customer: Submit the completed Excel file (with a single tab) to the Ex Libris migration team along with the rest of the files for the normal ILS migration.
4. Alma Migration Team: During Alma migration, processes and loads the Excel file to activate e-resources indicated by the customer in the Excel file.

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## Loading Options

There are a few options that customers can consider when submitting the KBart form for loading to Alma during migration.

**Combine activations (Yes/No)** - When Combine Activations is set to Yes, if there are multiple input forms, then activations in the second input form will be combined with the existing activations in Alma. This options works even when the previously loaded activations are from a different e-resource system, such as SFX. For more information on this, see [Multiple E-Resource Input](#). Default: No

**Deduplicate Portfolios (Yes/No)** - when Combine Activations = Yes, then if both activations are Selective (BY\_TITLE), then portfolios in the packages will be deduplicated. Please note that if the multiple portfolios have different date ranges, only the date range from the first portfolio will be used. Default: No

**Match by Title (Yes/No)** - When a package is Selected (BY\_TITLE), and the titles listed do not have an identifier such as ISSN or ISBN, then the loader can attempt to find a match by comparing the exact title of a portfolio with the titles of the portfolios in the specified package. The title is an exact match, including punctuation, so 'Biology.' does not match 'Biology'. Default: No

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### Note

The match by title option can currently process 10,000 titles per hour, which may add a significant amount of processing time to your overall migration timeline. If you have 400,000 titles without an identifier, this could add 40 hours to your timeline.

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If you wish to use one of these options, inform your Ex Libris representative so that they can inform the migration analyst.

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## Customer fills in the form

The file that is exported from KBart does not have enough information for loading into Alma. So, add three new columns to the beginning of the Excel workbook. The new columns are described below.

The most important column is the E-collection name in Alma. Search for the relevant collection in Alma, and copy the name of the collection exactly to the 'Collection Name CZ' column. Punctuation and capitalization is important for matching.

Do not add, remove, or change the names of columns, because the migration programs need the file in this exact format in order to process it correctly.

For Activate = Y (activate all), titles are not needed or used. If the collection is listed as Activate All, then all titles in Alma are activated automatically.

For Activate = BY\_TITLES, list all titles associated with this collection, including ISSN.

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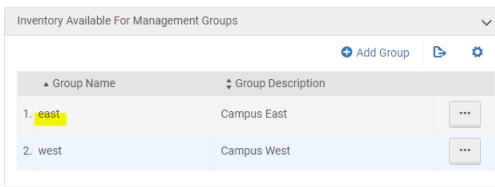
### **Note**

Only one line per title is supported. If your institution has multiple coverage dates, the title must be loaded once with a single coverage date span, and then the coverage dates corrected afterward in Alma.

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## Columns for Excel spreadsheet

Add three new columns to the exported KBART title file.

Field Name	New or Existing	Description/Instructions
Collection Name CZ	New	Identify the Alma collection that the title belongs to. Copy the collection name <b>exactly</b> as it is in Alma: this string is used as the match point for assigning the title to the collection. Capitalization and punctuation matter!
Activate?	New	Y = Aggregator, or Activate All  BY_TITLES = Selective (only the titles listed in this sheet are activated)
AVAILABLE_ FOR_GROUPS	New	<p>Here you can specify the name of the campuses/institutions for which the resource should be made available. For multiple values, use a semicolon separator with no spaces (for example GROUP1;GROUP2;GROUP3). AF Groups are assigned at the service level.</p> <p>For multiple campuses/institutions that require specific access by certain groups of patrons, fill in this column. 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 <a href="#">Inventory Network Groups</a> configuration area (Alma Configuration -&gt; Resources -&gt; Inventory Network Groups). The value required here for the AF group is in the first column, 'Group Name'.</p>  <p>If you used AF GROUPS in the form, your PS representative must inform the migration analyst in the SF case for the load.</p>
USE_PROXY Y, N	New	<p>Y or N.</p> <p>Blank = N</p> <p>If USE_PROXY = Y and you filled in a group(s) in the AVAILABLE_FOR_GROUPS column, then the proxy will be made available for the specified group(s).</p> <p>If USE_PROXY = Y and there is no group in the AVAILABLE_FOR_GROUPS column, then the proxy will be made available for the entire package.</p> <p>Information on resolver proxies may be found at <a href="#">Resolver Proxies</a>.</p> <p>Please note that proxies are only assigned to services at the collection level.</p>
publication_title	Existing	Not used if a match is found in the CZ. Used for title if no match was found, because in that case a local portfolio is created.
print_identifier	Existing	identifier; see see 'Matching Individual Titles/Portfolios' below
online_identifier	Existing	identifier; see see 'Matching Individual Titles/Portfolios' below
date_first_issue_ online	Existing	The to and from dates/volumes are placed in local coverage fields in Alma.
num_first_vol_	Existing	

online		
num_first_issue_online	Existing	
date_last_issue_online	Existing	
num_last_vol_online	Existing	
num_last_issue_online	Existing	
title_url	Existing	Not used if a match is found in the CZ. If a match is not found, this is placed in the newly created local portfolio.
first_author	Existing	Not used if a match is found in the CZ. If a match is not found, this is placed in the newly created local portfolio.
title_id	Existing	not used
embargo_info	Existing	placed in local embargo fields in Alma.
coverage_depth	Existing	not used
coverage_notes	Existing	placed in notes field
publisher_name	Existing	Not used if a match is found in the CZ. If a match is not found, this is placed in the newly created local portfolio.
own_anchor	Existing	not used
package:collection	Existing	not used
URL for identifying EZB Collection ID	Existing	not used
EZB Collection ID	Existing	not used
all_issns	Existing	identifier; see 'Matching Individual Titles/Portfolios' below
zdb_id	Existing	not used

## Matching Individual Titles/Portfolios

There is different behaviour depending on whether the migration loader finds a matched title in the Community Zone. If the loader finds a title match in the specified collection, the title is added as a linked portfolio. If no match is found, the title is added to the collection as a local portfolio.

Matching is done using the identifiers in this order: all\_issns, print\_identifier, online\_identifier. If you request it, the loader can match additionally by title where the title does not have an identifier present - match by title is not attempted if an identifier is present but failed to find a match.

As noted above, title matching is time-intensive and can add a lot of processing time to the migration process, depending on how many titles are present without an identifier match. Additionally, the title match is based completely on string-

matching. The migration programs do not attempt to remove certain words or punctuation in order to find a better match.

Sometimes the titles do not find a match in the CZ. This could be because the title is not in the CZ yet for this package (it may be there for a different package), or the identifiers provided are not the same as the identifiers in the CZ. When the title is not found as a CZ match, it is automatically added as a local portfolio for the global package indicated. Customers may request to have this title added to the CZ post-migration.

When local portfolios are created, the [default bibliographic record template](#) is used. If the default template is modified, some extraneous fields/punctuation may be present in locally-created portfolios. We are working to correct this, but in the mean time as a workaround, wait to modify the default template until after go-live.

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## Report of Loader Events

A report of the events which took place during the E-Resource load is available upon request. This report is usually very large, and many entries are purely informational. However, it may be useful to review.