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## Post migration clean-up of eResources in Alma

- **Product:** Alma
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### Links to useful documentation:

#### ***Electronic Resources in Alma – Managing Duplication***

[https://knowledge.exlibrisgroup.com/Alma/Implementation\\_and\\_Migration/Migration\\_Guides\\_and\\_Tutorials/Electronic\\_Resource\\_Handling\\_in\\_Alma\\_Migration#Managing\\_Duplication\\_in\\_Alma](https://knowledge.exlibrisgroup.com/Alma/Implementation_and_Migration/Migration_Guides_and_Tutorials/Electronic_Resource_Handling_in_Alma_Migration#Managing_Duplication_in_Alma)

Note that if you need to make a set in Alma of type 'Electronic Portfolios' and have an input file from a vendor see: [How to create an Alma set of type Electronic Portfolios from an input file of ISBNs \(a vendor list of e-book ISBNs\)](#).

Note that if you need to make a set of content type 'Electronic Portfolios' in Alma, there is an option to do this from an analytics report. See [How to create an Alma set of Electronic Portfolios using the Portfolio ID from an Alma Analytics report](#) for more information.

#### ***Duplicate title analysis – this tool can assist in identifying duplicates in Alma across formats***

[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/070Advanced\\_Tools/020Using\\_Duplicate\\_Title\\_Analysis](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/070Advanced_Tools/020Using_Duplicate_Title_Analysis)

#### ***Managing Electronic Resources – a high level overview of electronic resource management in Alma, including performing global changes on sets of portfolios, linking local eResources to the CZ and more***

[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)

### Commonly used post-Migration clean-up tasks for eResources

1. [Remove duplicate electronic portfolios](#)
2. [De-activate duplicate electronic portfolios](#)
- 3.

## Group ILS-migrated P2E portfolios into local collections to make them easier to manage

4. [Link ILS-migrated P2E portfolios to CZ but retain ILS-migrated bib records](#)
5. [Remove proxy prefix from P2E portfolio URLs](#)
6. [Locate duplicate electronic portfolios or electronic collections that were used as acquisitions records in your ILS](#)

### 1. [Remove Duplicate Electronic Portfolios](#)

**Use Case 1:** During Migration, you provided a P2E file of ILS bib records representing eResources. You also provided data from your link resolver (SFX for example).

Post-migration you notice duplicate records—one coming from the P2E and another from the link resolver data

**Goal:** Remove the ILS migrated P2E portfolio and retain the CZ linked portfolio

**Use Case 2:** Migrated ILS P2E records contained multiple 856 fields in the bib and an electronic portfolio was created for each one.

**Goal:** Remove duplicate ILS P2E portfolios

#### **Clean-up option 1:**

- Create a set of standalone portfolios
  - Tip! To find P2E portfolios, search for: Electronic Portfolio "Is Standalone" equals "Yes"
  - Add additional search criteria as needed
    - Ex: URL contains <https://proxy.proquest.com/openurl?>
    - Ex: Title: Tag Suppressed (Title) equals "Yes"
    - Ex: Interface Name contains "ProQuest Full-Text" (this would be the value you had in the bib & specified as the *Provider Name* field on the migration form)
  - Save Query
- Run **Delete Portfolios** job

**Result:** Duplicate local portfolios and their related bib (if bib is not linked to any orders or other inventory) are removed.

## Clean-up option 2:

- Create a set of standalone portfolios
  - Tip! To find P2E portfolios, search for: Electronic Portfolio “Is Standalone” equals “Yes”
  - Add additional search criteria as needed
    - Ex: URL contains <https://proxy.proquest.com/openurl?>
    - Ex: Title: Tag Suppressed (Title) equals “Yes”
    - Ex: Interface Name contains “ProQuest Full-Text” (this would be the value you had in the bib & specified as the *Provider Name* field on the migration form)
  - Save Query
- Use the Export URLs job to create a .csv file of all URLs in the standalone portfolios set (see Alma documentation on *Running Manual Jobs on Defined Sets* for more info)
- Use Excel to identify duplicate values & modify the Excel so it includes \*only\* the IDs you want to delete
- Use the file of IDs to create an itemized set of “IDS to Delete”
- Run *Delete Portfolios* job

**Result:** Duplicate local portfolios and their related bib (if bib is not linked to any orders or other inventory) are removed.

## 2. [De-activate Duplicate Electronic Portfolios](#)

**Use Case:** During Migration, you provided a P2E file of ILS bib records representing eResources.

You also provided data from your link resolver (SFX for example).

Post-migration you notice duplicate records—one coming from the P2E and another from the link resolver data. You are not ready to delete the ILS record from Alma but you do not want it to display in Primo.

**Goal:** De-activate the ILS migrated P2E portfolio

## Clean-up:

- Create a set of standalone portfolios
  - Tip! To find P2E portfolios, search for: Electronic Portfolio “Is Standalone” equals “Yes”
  - Add additional search criteria as needed
    - Ex: URL contains <https://proxy.proquest.com/openurl?>
    - Ex: Title: Tag Suppressed (Title) equals “Yes”
    - Ex: Interface Name contains “ProQuest Full-Text” (this would be the value you had in the bib & specified as the Provider Name field on the migration form)
  - Save Query
- Run the Change Electronic Portfolio Information job to de-activate portfolios

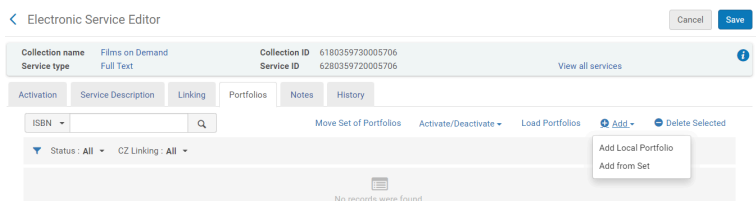
**Result:** The local ILS-migrated electronic portfolio is de-activated and will not display to end-users in Primo.

### 3. [Group ILS-migrated P2E portfolios into local collections to make them easier to manage](#)

**Use Case:** I have many ILS-migrated P2E portfolios for *Films on Demand*. Rather than managing them individually, I want to create a local electronic collection within Alma so I can manage them as a group.

#### Steps:

- Create a set of standalone portfolios that should be in the local electronic collection
  - Electronic Portfolio “Is Standalone” equals “Yes”
  - Add additional criteria (ex. URL contains “<http://filmsondemand.com>”)
  - Save Query
- Create a set of standalone portfolios
  - Tip! To find P2E portfolios, search for: Electronic Portfolio “Is Standalone” equals “Yes”
  - Add additional search criteria as needed
    - Ex: URL contains <https://proxy.proquest.com/openurl?>
    - Ex: Title: Tag Suppressed (Title) equals “Yes”
    - Ex: Interface Name contains “ProQuest Full-Text” (this would be the value you had in the bib & specified as the *Provider Name* field on the migration form)
  - Save Query
- Create a Local Electronic Collection
  - On the “Portfolios” tab, use “add from set” to associate the portfolios with this collection



**Result:** Local portfolios contained in this local electronic collection can now be managed within the collection.

### 4. [Link ILS-migrated P2E portfolios to CZ but retain ILS-migrated bib records](#)

**Use Case:** ILS-migrated P2E portfolios have enhanced bibs. Catalogers want to retain bib quality but also want to benefit from automated linking and coverage updates from the CZ.

**Goal:** Link the P2E migrated portfolios to the CZ version of the portfolio

#### Steps:

- Create Local Electronic Collection
- Group local portfolios into a set
- Add portfolios to the local electronic collection (Edit Service>Portfolios>Add from Set)
- Search for the electronic collection, click the ...> Link to Community

- Select the target CZ Electronic Collection and choose “No” to the question “Use the Community bibliographic records?”

Local Information	
Service type *	Full Text
Total number of portfolios	1
Number of local portfolios	1

Community Information	
Electronic collection name *	MyiLibrary
Type	Selective package
Interface name	MyiLibrary
Service type	Full Text

Bibliographic Records Configuration	
Match routine	By ISBN/ISSN Identifier
Use the community bibliographic records	<input type="radio"/> Yes <input checked="" type="radio"/> No

**Result:** Local Electronic Collection is linked to CZ. Portfolios are linked to CZ but local bibliographic records are used.

**Note:** If CZ collections were activated during link resolver (for example, SFX) migration, they will still exist, so they should be withdrawn after the local portfolios are successfully linked.

## 5. [Remove proxy prefix from P2E portfolio URLs](#)

**Use Case:** Proxy URL for ILS-migrated P2E portfolios contains our EZProxy prefix. Enable Proxy is set to “Yes” so the EZProxy prefix configured in Alma is automatically prepended to these URLs during link resolution. Resolution is failing because two EZProxy prefixes are being applied.

**Goal:** Remove EZProxy prefix from ILS-migrated P2E portfolios

### Steps:

- Create a set of standalone portfolios
  - Electronic Portfolios “Is Standalone” equals “Yes”
  - URL contains <http://proxy.institution.edu/login?url=>
- Run the *Change Electronic Portfolio Information* job

Task Parameters: Change Electronic Portfolio Information			
<input type="checkbox"/>	Set interface name (for reservations)	<input type="text"/>	Unconditionally
<input type="checkbox"/>	Set owner	<input type="text"/>	Unconditionally
<input type="checkbox"/>	Remove 'Available For' groups	All DA	
<input type="checkbox"/>	Add 'Available For' groups	All DA	
<input type="checkbox"/>	Electronic Material Type	Book	
<input type="checkbox"/>	Remove local coverage		
<input type="checkbox"/>	Set license	Select from a list	Unconditionally
<input type="checkbox"/>	Set PDA	Select from a list	Unconditionally
<input type="checkbox"/>	Delete or replace url's prefix	http://proxy.institution.edu.	with <input type="text"/>
<input type="checkbox"/>	Enable proxy	<input type="radio"/> No <input checked="" type="radio"/> Yes	Unconditionally
<input type="checkbox"/>	Set proxy	<input type="text"/>	Unconditionally
<input type="checkbox"/>	Set availability status	<input type="radio"/> Active <input type="radio"/> Inactive	
<input type="checkbox"/>	Override public note	<input type="text"/>	Unconditionally

## 6. [Locate duplicate electronic portfolios or electronic collections that were used as acquisitions records in your ILS.](#)

**Use Case:** We have duplicate records for eResources—one record migrated as part of ILS P2E migration and the other as part of link resolver migration. We don't need the ILS P2E record but it is linked to an order. We want to use the CZ record only and remove the ILS P2E record.

**Goal:** Remove acquisitions record and relink order to CZ record

### Steps for Electronic Collection records:

- Do an advanced search for: Electronic Collections where All titles (Originating System contains keywords "ILS") and Electronic Collection (Electronic collection Type equals "Selective package")
- Relink any orders to the CZ record
- Delete duplicate

**Result:** Order is linked to CZ record and duplicate ILS P2E record has been deleted from Alma.

### Steps for Electronic Portfolio records:

- Do an advanced search for: Electronic portfolio where All titles (Tag Suppressed equals "Yes" and Originating System contains keywords "ILS") and Electronic Portfolio (Is Standalone equals "Yes" and Material Type equals "Journal")
- Relink any orders to the CZ record
- Delete duplicate

**Result:** Order is linked to CZ record and duplicate ILS P2E record has been deleted from Alma.

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