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## E-Resource Activations

Ex Libris supports migration from certain link resolver systems, such as SFX and 360Link. Other link resolver systems are not supported in migration, so customers may batch-active resources using the [E-Resource Activation Form](#), an Excel worksheet which contains the current list of e-resources available in the Alma KB.

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### Note

Migrating from SFX and 360Link uses a different process and does not use this E-Resource activation form. See the [SFX to Alma Migration Guide](#) and the [360 and Intota to Alma Migration Guide](#) for more information.

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### The main steps for non-Ex Libris systems:

1. Customer: Downloads an up-to-date [Excel template](#). The Excel includes all potential global/CZ-managed electronic collections according to package type: Licensed Aggregators, Free Aggregators, and Selective Aggregators.
2. Customer: Updates the Excel form to indicate the relevant global electronic collection (package) and selective title activations. Ex Libris recommends using your sandbox access to the community zone (CZ) search to help in the matching of your link resolver collection and title names to the CZ version names. Additionally, the particular title list for any package must be provided in the Excel Title tab along with at least one identifier of PORTFOLIO\_PID, ISBN, or ISSN in order for the package activations to include any the titles. If the customer institution has multiple activations for the same resource, such as the law library and the main library, multiple forms may be submitted, which will result in double activations. See the section on Multiple Activations below.
3. Customer: do not modify the default bibliographic record template until after go-live. If the default bib record template is modified prior to the E-Resource Activation Load, extraneous fields may appear in the bib for locally created portfolios.
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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### Note

The Excel format used in the batch title activation flow described in this document is very similar to the one that can be used for batch activation in Alma for ongoing purposes. The main difference is that the ongoing process handles loading titles for a specific electronic collection, whereas this process handles activating electronic collections and loading all titles in one batch process. This process of batch activating all titles for all e-collections for the library is migration-specific and done only during implementation.

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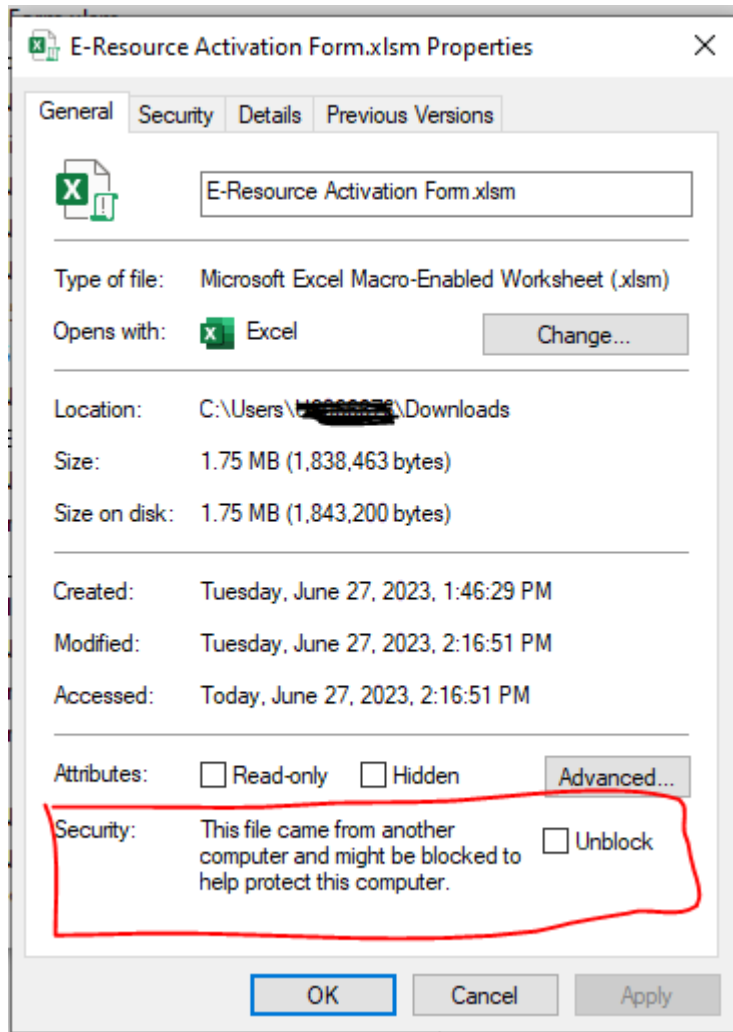
## Troubleshooting problems in Excel File

### Unblock Macros

If the macros in the downloaded E-Resource Activation Form are not enabled, you may need to unblock macros in the file. If the dropdown box on the TITLES tab does not show collections that you have marked as BY\_TITLE, then the macros

are blocked.

To unblock macros, close the file. In the Windows directory where the file is stored, right click on the file, and click 'Properties'. Then, click the 'Unblock' checkbox as noted below



### Use a local version of the file

If you are having problems seeing values in dropdown lists, be sure that you are using a local copy of the file on your own computer. Do not edit this in a shared situation.

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## Loading Options

There are a few options that customers can consider when submitting the E-Resource Activation 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](#), and also the "Multiple Activations" section below.

**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.

**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'. Match by title is not attempted if identifiers are present but failed to find a match.

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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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## Validating the Form

Customers should validate the completed E-Resource Activation Form using the [Validating Migration Forms](#) tool available in any Alma instance. Use the instructions found at the link [https://knowledge.exlibrisgroup.com/...Migration\\_Form](https://knowledge.exlibrisgroup.com/...Migration_Form)

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## Customer fills in the form

### Packages Tabs

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#### **Note**

In this document, and in the accompanying Excel spreadsheet, the term package is used to mean electronic collection which has a list of titles, either Activate All or Selective Activation.

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There are five tabs on the E-Resource Activation spreadsheet - the first three tabs are packages tabs, the fourth is the Database tab (zero-title packages), and the fifth is a TITLES tab that is used to list titles for packages indicated as Selective Databases (activated with BY\_TITLE).

The first three tabs, FREE\_PKG, LICENSED\_AGG, and SELECTIVE\_PKG contain package information.

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#### **Note**

Local packages cannot be activated using this tool. They must be activated in Alma manually post-migration. The standard Alma portfolio/title loader may be used to batch populate local packages after they are manually activated.

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Post-migration, the bibliographic records for the packages from FREE\_PKG, LICENSED\_AGG, and SELECTIVE\_PKG are suppressed from discovery. The titles in the packages are what is interesting to the customer, so they migrate as available in the discovery system.

### **Free Packages vs Open Access (CDI)**

The FREE\_PKG tab is populated automatically by checking the 'Free' flag on e-collections in Alma.

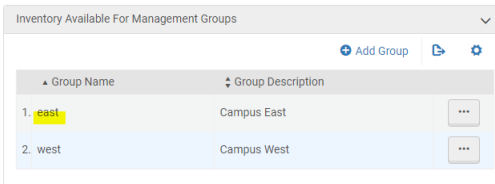
Free (Open Access in Alma) is not the same as the Open Access indication for CDI. For more information on Open Access, see [Open Access Content in CDI](#).

### **Database Tab**

The DATABASE tab contains zero-title packages, and operates similarly to the three packages tabs as described above. The dropdown contains Y, N, and BY\_TITLES, but BY\_TITLES is not actually used - if selected, this will act as if it is N.

Post-migration, the bibliographic records for the databases migrate as unsuppressed and made available for discovery. Additionally, if the database is linked to CDI content, the CDI content is also discoverable.

# Columns on Packages and Database tabs

Field Name	Notes
PACKAGE_NAME	The name of the package. For Databases, there may be some packages with identical names. See "Duplicate Database Names" section below.
SERVICE_TYPE	Some packages have multiple service options available, for example getFullTxt or getSelectedFullTxt.
ACTIVATE?	<p>Indicate how you want the package to be activated (or not) using this column.</p> <ul style="list-style-type: none"> <li>• N – Do not activate any titles in the package.</li> <li>• Y – Activate all titles in the package. Titles do not need to be listed in the TITLES tab.</li> <li>• BY_TITLES – Activate the package but only activate the titles that are listed in the TITLES tab. If you select BY_TITLES, but no titles are listed in the TITLES tab, the package still copied from CZ to IZ as INACTIVE, with no portfolios.</li> </ul> <p>Leaving the ACTIVATE? column blank defaults to N.</p>
AVAILABLE_FOR_GROUPS	<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 for collections. Databases do not have a service, so the AF group and proxy are assigned at the collection level.</p> <p>For multiple campuses/institutions that require specific access by certain groups of patrons, fill in the column AF GROUPS. 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>During the validation process, a warning may show if the group is longer than 20 characters. When listing multiple groups, this limit may be reached and the warning can be ignored.</p> <hr/> <p><b>Note</b></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> <hr/>
USE_PROXY	<p>Yes or No. Blank = No.</p> <p>Similar to AF groups, proxies are only assigned to the service of the collection, except Databases which do not have a service so they are at the collection level. Proxies are not assigned to individual portfolios during migration.</p> <p>If USE_PROXY = Yes 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 = Yes 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>

LEAVE BLANK	This column is not used in this worksheet, but must be present for data consistency with the loader program. Please leave this blank.
PROXY_SELECTED	If USE_PROXY = Y, then you may specify a proxy code in this column. If you leave this column blank, the default proxy will be assigned.  If USE_PROXY = N, then this column is not used.

## Multiple entries on the Database Tab

There are some databases which have the exact same title as another database in the list, and it is impossible to tell the difference between the two databases from the title alone. In this case, there are two hidden columns in the Database tab, columns A and B, which may be used to determine the correct database line to activate. To see columns A and B on the spreadsheet, just drag the column headers.

	A	B	PACKAGE_NAME
1	PACKAGE_ID	SERVICE_ID	PACKAGE_NAME
2	6186541870002		Acland's Video Atlas of Human Anatomy
3	6136843769000		International bioethics organizations datab
4	6136846772000		National Archives Catalog
5	6114066050000		.wavFX HD Production Suite
6	6113965630000		1177.se
7	6114011210000		1470-1960 הירליגורפיה של הספר העברי (The

### Note

Do not modify columns A and B, as they are used by the loader program to activate the collections/databases.

The following image shows column A, which is the collection ID. Customers can compare collection ID in the spreadsheet to the collection ID in Alma to identify the correct database. The following examples show where to find the collection ID in the spreadsheet and in Alma.

	A	B
39	6113973420000041	A to Z Maps Online
40	6114057280000041	A to Z The USA
41	6113961990000041	A to Z The World
42	6113965730000041	A to Z World Business
43	6114032580000041	A to Z World Business
44	6113928000000041	A to Z World Culture
45	6114019020000041	A to Z World Trade

Institution		Community	
Sort by : Collection name - Asc			
1	A to Z World Business	Type: Database Interface name: World Trade Press Creation Date: - Modification Date: -	Collection ID: 6113985730000041 MMS ID: 997470999400041
2	A to Z World Business	Type: Database Interface name: World Press Trade Creation Date: 15/12/2019 22:32:13 EST Modification Date: 10/01/2021 15:02:18 EST	Collection ID: 6114032980000041 MMS ID: 997471983700041

## Multiple Activations

Customers who have multiple administrative units migrating to a single institution in Alma may desire to manage their activated resources separately. In this case, customers may fill out multiple forms and have them loaded into the same institution. The multiple activations can be combined in Alma or activated separately depending on the response to the 'Combine Activations' flag - see "Loading Options" above for more information

**Available For groups:** When the different administrative units have multiple Available For groups, Ex Libris recommends you use a different AF group for each form. For example, the main library has an activation for Resource A, and so does the law library. When Combine Activations = No, the main library form will activate this resource with AF group MAIN, and the Law library form will have this resource activated with AF group LAW. When Combine Activations = Yes, the AF group LAW will be added to the existing activation so the final activation has AF groups of MAIN and LAW.

For more information on multiple e-resource input, see [Multiple E-Resource Input](#).

For considerations about how many available for groups to have, see [Considerations for Available For Groups](#).

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## E-collection special case: automatic holding feature

While it is possible for customers to load individual portfolios for the following collections, Ex Libris recommends that you set up the automatic holdings feature instead.

The collections which allow for automatic holdings are:

- SpringerLink Journals
- SpringerLink Books
- Elsevier ScienceDirect Books Complete
- Elsevier ScienceDirect Journals Complete
- Books@Ovid Subscription Complete
- Books@Ovid Purchase Complete
- Journals@Ovid Complete
- Wiley Online Library Books
- Wiley Online Library Journals
- Taylor & Francis Books

The collections generally have a large amount of portfolios, and the portfolios are updated continuously. Setting up autoholdings saves time in that the updates are automatically transferred from the publisher to Alma, with little management

on the customer part once it is set up.

In order to set up the auto holdings feature for these collections, see the instructions on the [Automatic Upload of Electronic Holdings](#) page.

If using autoholdings, activate the collection separately from this form.

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## E-collection special case: Ebook Central

Ebook Central collections are not loaded by the E-Resource Activation form. For an explanation, see [https://knowledge.exlibrisgroup.com/...ivations\\_\(EBC\)](https://knowledge.exlibrisgroup.com/...ivations_(EBC))

## Individual Titles/Portfolios

On the **TITLES** tab, provide the following information in order to determine the relevant title activations and optional coverage characteristics to apply to those activations – per global package from package tabs described above. 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.

Globally managed titles that are part of globally managed packages (matched based on either ISBN, ISSN or Alma community zone's internal PORTFOLIO\_PID for the package indicated) automatically obtain the bibliographic information managed in the CZ and are activated accordingly in your institution. For every non-local portfolio listed in the titles tab, at least one ISBN, ISSN, or Alma portfolio PID must be provided in order to be considered for loading/activation.

If multiple resources are found for a identifier match (ISBN, ISSN), then the loading program attempts to search again using the URL. This function is rarely exercised because the ISSN/ISBN match only checks for titles within the specified package.

If you have multiple identifiers for a title, they may be provided in the three ISSN or three ISBN fields provided. Do not provide multiple identifiers in a single field. Additionally, do not duplicate identifiers - do not provide the same identifier (or similar, like 1234-5678 and 12345678) in two different fields for the same title.

### Creating local portfolios

Sometimes the titles on the TITLES tab 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.

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#### Note

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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In rare cases, locally managed titles that are not part of any package may be activated as local standalone portfolios (not associated with any package). Since resources in this LR form get Available For (inventory) groups associated with a package, standalone portfolios cannot be assigned a group.

### Standalone Local Portfolios

This worksheet is intended mainly for activating global inventory managed in the community zone. Local e-inventory (of the package, database, or standalone type) can also be created from the title tab by indicating the package name STANDALONE (the last package name in the drop-down list). However, in most cases, standalones are created from the ILS system using the P2E process, so it is important NOT to load standalones that are also present in your ILS system (to avoid unnecessary duplication).

Standalones cannot be combined into any collection, local or otherwise. It is strongly discouraged to use the standalone option without first ensuring the numbers provided are limited below 5K standalone portfolios and only after first consulting with your Ex Libris project consultant.

Standalone portfolios cannot be assigned a proxy. Proxies are only assigned at the service level (or database level because there is no service for a database). Proxies are not assigned to individual portfolios in any case, standalone included.

Field Name	Notes
PACKAGE_NAME	<p>Should match a package name from tab 3 for global packages if you selected BY_TITLES for the package. Alternatively, if the Title being activated is a local standalone, choose STANDALONE (the last option in the dropdown list). If you do not have any STANDALONE packages, go to the SELECTIVE_PKG tab and set STANDALONE to N so it does not appear in the dropdown.</p> <hr/> <p><b>Note</b></p> <p>If the dropdown box does not populate with the BY_TITLES collections, the macros in the file may be blocked. To unblock the file, see the section above 'Unblock Macros in Excel File'.</p> <hr/>
PORTFOLIO_PID	<p>Will generally be left blank – the internal PID # used in the community zone for this portfolio in Alma. This ID can only be determined by searching the community zone, opening the relevant community e-collection’s portfolio list within the community zone, and running an extended export as Excel.</p> <p>This is not to be confused with the institutional level portfolio PID (via institution-level search results instead of the Community-level results), which is activated in your institution, is not persistent, and is ignored. (Either Portfolio ID, ISSN, or ISBN are mandatory)</p>
ISSN	<p>ISSN identifier (requires at least one Portfolio ID, ISSN, or ISBN). Note: more than one ISSN column value may be passed in the three available ISSN fields, if desired. This is intended in cases where more than one ISSN (for instance E-ISSN) exists. Do not provide multiple ISSNs in the same field - they must be provided individually in the separate fields. If you provide a number with hyphens or other punctuation, it will be removed in order to find a match.</p>
ISBN	<p>ISBN identifier (Either Portfolio ID, ISSN or ISBN are mandatory). Note: more than one ISBN column value may be passed, if desired. This is intended in cases where more than one ISBN (for instance E-ISBN) exists. Do not provide multiple ISBNs in the same field - they must be provided individually in the separate fields. If you provide a number with hyphens or other punctuation, it will be removed in order to find a match.</p>
<hr/> <p><b>Note</b></p> <p>All fields are below are used if the portfolio being loaded is:</p> <ul style="list-style-type: none"> <li>• A local standalone portfolio – not linked to any package. Standalone portfolios require an identifier (ISBN/ISSN) along with Title, URL, and coverage.</li> <li>• A local portfolio linked to a global package.</li> </ul> <p>If the portfolio is CZ-linked, meaning a match was found, then the only fields which are added to the CZ-linked portfolio are:</p> <hr/>	

Field Name	Notes
FROM_* TO_* EMBARGO_*	
TITLE	The 245 ja to apply to this title. Will only be used if the title is local.
PUBLISHER	Free Text
AUTHOR	Free Text
URL	This URL is only loaded to Alma for local (newly-added) portfolios.
<p><b>The FROM_*, TO_*, and EMBARGO_* fields below are placed in the "Local Coverage" fields in Alma. Use these fields only if your coverage is different from the default (global) coverage. If there is no local coverage, then the portfolio displays the global coverage which is inherited from the CZ.</b></p>	
FROM_YEAR	The YYYY coverage start date of the title.
FROM_MONTH	The MM coverage start month of the title (used with FROM_YEAR). Single digit month is acceptable, so 1 or 01 is fine.
FROM_DAY	The DD coverage start day (used with FROM_YEAR and FROM_MONTH). Single digit day is acceptable, so 1 or 01 is fine.
TO_YEAR	The YYYY coverage end date of the title. Words like 'Present' not accepted. If the content is currently received, leave this column blank.
TO_MONTH	The MM coverage end month of the title (used with FROM_YEAR). Words like 'Present' not accepted. If the content is currently received, leave this column blank. Single digit month is acceptable, so 1 or 01 is fine.
TO_DAY	The DD coverage end day (used with FROM_YEAR and FROM_MONTH). Words like 'Present' not accepted. If the content is currently received, leave this column blank. Single digit day is acceptable, so 1 or 01 is fine.
FROM_VOLUME	The numeric volume number of when the title coverage begins
TO_VOLUME	The numeric volume number of when the title coverage ends. Words like 'Present' not accepted. If the content is currently received, leave this column blank.
FROM_ISSUE	The numeric issue number of when the title coverage starts
TO_ISSUE	The numeric issue number of when the title coverage ends. Words like 'Present' not accepted. If the content is currently received, leave this column blank.
EMBARGO_OPERATOR	<p>permitted values: &gt;, &gt;=, &lt;, &lt;=</p> <p>Note: If EMBARGO_OPERATOR is filled, then either EMBARGO_YEARS or EMBARGO_MONTHS must be filled (one or the other). Also, the opposite is true: if EMBARGO_YEARS or EMBARGO_MONTHS are filled, then you must use the EMBARGO_OPERATOR.</p>

Field Name	Notes
	<p><u>Operator meanings:</u></p> <p>&lt;= (less than or equal to) = Most recent X year(s) available</p> <p>&gt;= (greater than or equal to) =Most recent X year(s) not available</p> <p>&lt; (less than) = Most recent X year(s)-1 available</p> <p>&gt; (greater than) = Most recent X year(s)+1 not available</p> <p>See also <a href="#">Publishing and Inventory Enrichment</a></p>
EMBARGO_YEARS	possible value: positive integer number.
EMBARGO_MONTHS	possible value: positive integer number.
PUBLICATION_DATE_OPERATOR	These PUBLICATION* fields are not used by the loader. ExL is in the process of removing them for a future release.
PUBLICATION_DATE_YEAR	
PUBLICATION_DATE_MONTH	
ELECTRONIC_MATERIAL_TYPE	<p>Acceptable values:</p> <p>BOOK</p> <p>JOURNAL</p> <p>DISSERTATION</p> <p>PROCEEDING</p> <p>CONFERENCE</p> <p>REPORT</p> <p>DOCUMENT</p> <p>SERIES</p> <p>NEWSPAPER</p> <p>TRANSCRIPT</p> <p>DATABASE</p> <p>WIRE</p> <p>CDROM</p> <p>MANUSCRIPT</p> <p>RECORD</p> <p>MAP</p> <p>OTHERVM</p> <p>SCORE</p>
AVAILABILITY	ACTIVE or INACTIVE. This is case sensitive, so 'Active' is not accepted.
NOTES	Placed in a general note in the portfolio

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## Post-Migration Manual Steps, If Necessary

### Add Local Packages

If any non-global packages need to be reflected in Alma, they can be added using standard Alma tools from the **Resource Management > Create Inventory > Add Electronic Collection** wizard.

If additional portfolio titles need to be loaded (if, for instance, one or more were missed during the initial load), see [Managing Electronic Collections](#) for more information on the above process and format. This step may also be performed on production, if necessary.

### Set Up Special Institution-Specific Package Access Parameters

There are some packages where you need to manually set the institution-specific linking parameters. This step must be performed manually, post-migration, from each relevant package. There is a spreadsheet that customers can use to gather the necessary information, the Special Parameters for Link Resolver. For information on these special packages, see the Alma documentation 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).

### 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.

The important lines are for skipped resources. Here are some examples:

```
Skipping 2 for package: National Council of Teachers of English. Reason: Package was not selected for activation by titles - Job ID: 380284740008584
```

```
Package: Oxford Scholarship Online with service: getFullTxt does not exist in CZ, skipping - Job ID: 380284740008584
```