



Processing the Community Zone Updates Task List

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GSU Background

Helpful Links

What is the Community Zone Update?

Who should process it?

Why should I process this?

Prep Work

How to access the update?

When to process the update?

Processing the Update and tracking progress

Dismissing records and what to look for

citation

GSU Non-GALILEO E-Resources

Databases: 180

Electronic Collections: 241

Portfolios: 537,775

Helpful Links

GIL Training Wiki

ERM > CKB Updates

<https://sites.google.com/view/g3almatraining/erm/ckb-updates>

Community Zone Updates Task List workflow

https://drive.google.com/file/d/1qF7MEqM3yXPj9LuxeB_AvZdXIoRQDNHG/view

Ex Libris Knowledge Center

Working with the Community Zone Updates Task List

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/040Resource_Management/050Inventory/060Working_with_the_Community_Zone_Updates_Task_List](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/060Working_with_the_Community_Zone_Updates_Task_List)

GALILEO Interconnected Libraries (GIL) Documentation

▼ Getting Started

GIL Master Calendar

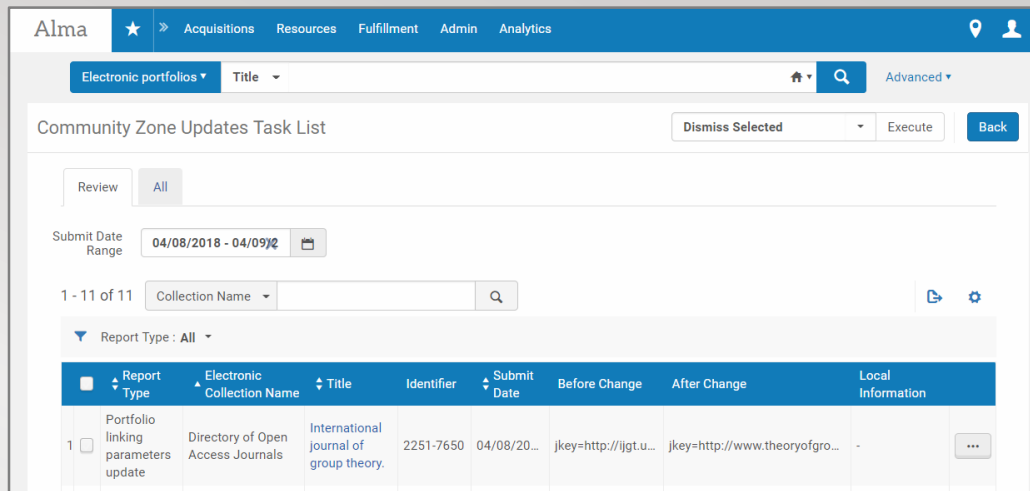
^ ERM

Activating E-Resources

CKB Updates



What is the Community Zone Update?



The screenshot shows the Alma Community Zone Updates Task List interface. At the top, there's a navigation bar with 'Alma' and various tabs like 'Acquisitions', 'Resources', 'Fulfillment', 'Admin', and 'Analytics'. Below this, a search bar and 'Advanced' options are visible. The main heading is 'Community Zone Updates Task List'. There are buttons for 'Dismiss Selected', 'Execute', and 'Back'. A 'Review' section shows 'All' items. A 'Submit Date Range' filter is set to '04/08/2018 - 04/09/2018'. Below this, a table lists the updates. The table has columns for 'Report Type', 'Electronic Collection Name', 'Title', 'Identifier', 'Submit Date', 'Before Change', 'After Change', and 'Local Information'. One row is visible, showing a 'Portfolio linking parameters update' for the 'Directory of Open Access Journals'.

Report Type	Electronic Collection Name	Title	Identifier	Submit Date	Before Change	After Change	Local Information
Portfolio linking parameters update	Directory of Open Access Journals	International Journal of group theory.	2251-7650	04/08/20...	jkey=http://ijgt.u...	jkey=http://www.theoryofgro...	-

Synchronize Changes from CZ job

- Copies changed authorities and resources from CZ to IZ
- Adds changes to the Community Zone Updates Task List page

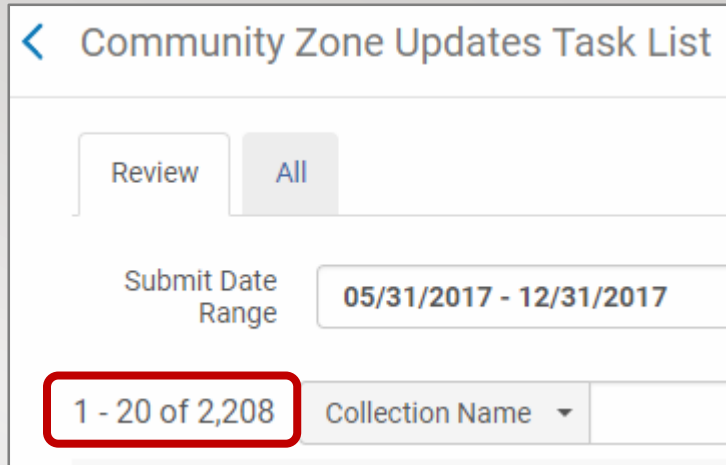
SYNCHRONIZE CHANGES FROM CZ JOB

Who Needs to Process the Update?



- Active electronic resources
- Not maintained by GALILEO
- In the Institution Zone
- Linked to the Community Zone

Why Should I Process This?



< Community Zone Updates Task List

Review All

Submit Date Range 05/31/2017 - 12/31/2017

1 - 20 of 2,208 Collection Name ▾

- Number of records unprocessed build up
- Some records need action
- Check for errors
- Ensures patrons have access

Prep Work

1. Create a “Collections to check or ignore in the CZ update” table
 - E-Inventory Subject Area: Electronic Collection and Portfolio dimension tables
 - Pull these attributes and measures:

Electronic Collection	Portfolio
Public Name	No. of Portfolio (In Repository)
Public Name Override	Is Free

Prep Work

You might want to include:

- Electronic collection ID
- Proxy
- Description
- PO #
- PO Line Reference
- Electronic Collection MMS ID
- Activation Date

Auto Activated Portfolios

Electronic Service Editor Cancel Save

Collection name American Physical Society Journ... Collection ID 61175844790002952
Service type Full Text Service ID 62175847020002952 [View all services](#)
Provider package 3MX
code (DB id)

Activation Information Service Description Linking Information Portfolios Notes History

Service activation status ☐ Not Available ☒ Available

Activate new portfolios associated with service automatically? ☒ No ☐ Yes

Active from date 11/20/2010 X 📅 Active until date 📅
Service temporarily unavailable message ☒ No ☐ Yes Service unavailable message as of date 📅
Service unavailability reason

Prep Work

2. Export query to Excel

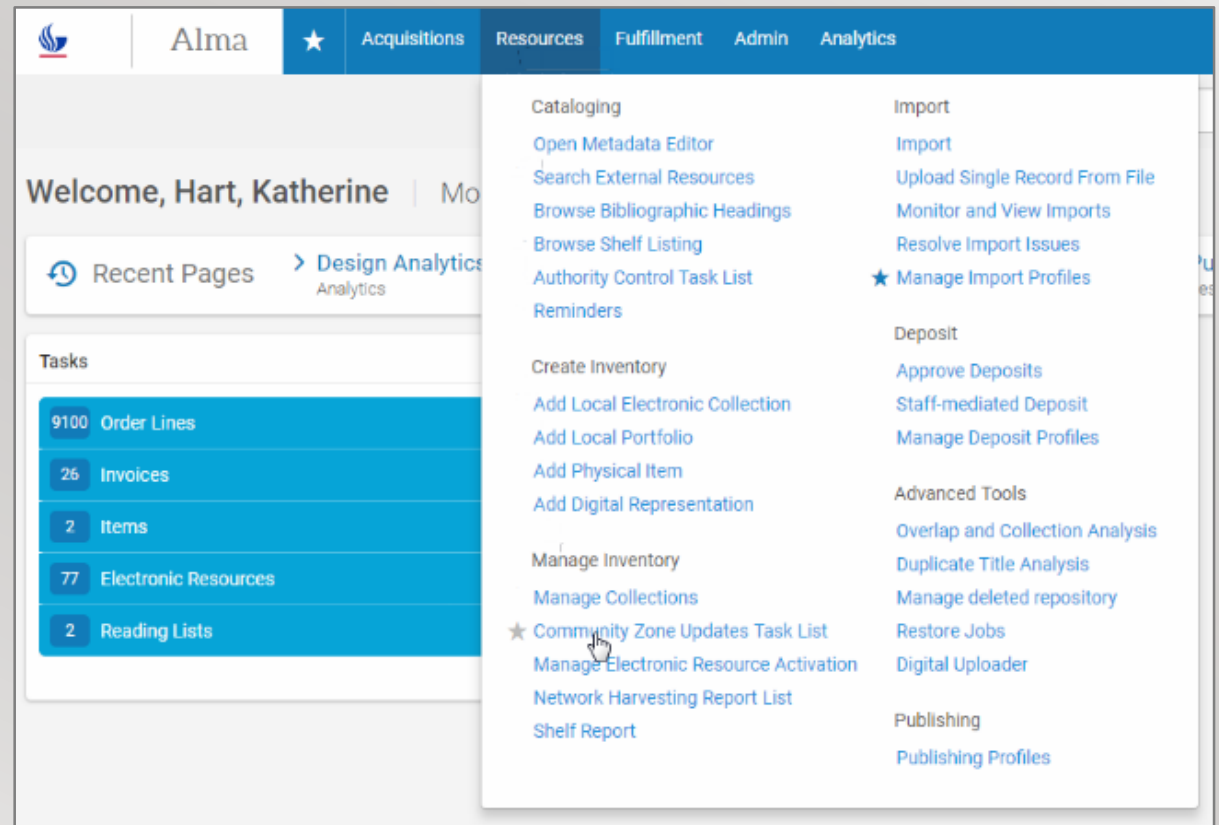
3. Add columns for “Verify in Update” and “Auto Activate”

VERIFY in Update	Public Name	Public Name Override	Auto Activate	Electronic Collection Id	Proxy	Description	PO Number	PO Line Reference	Electronic Collection MMS ID	Activation Date
NO	ACM Digital Library		Yes	61175845320002952	Yes	Selective package	PO-6102	18186-gsudb	9934393053302952	2010-11-21
YES	AIP Journals (American Institute of Physics)	American Institute of Physics Journals	No	61175845360002952	Yes	Selective package	PO-11501	POL-4660	9934402053502952	2010-11-21
YES	AIP Scitation American Association of Physics		No	61175845330002952	Yes	Selective package				2010-11-21
YES	Akademiai Kiado		No	61175844300002952	Yes	Selective package				2014-07-22
YES	ALA ACRL Association of College and Research Libraries	Association of College & Research Libraries	No	61175844990002952	No	Selective package				2011-06-21

- If Auto Activate = Yes; Do Not Verify
- If Auto Activate = No; Verify

How to Access the Update

Go to Alma menu > Resources >
Manage Inventory > Community Zone
Updates Task List



CZ UPDATES TASK LIST

When to Process the Update

The Synchronize Changes from CZ job runs on Sundays.

Select the date range that includes all the Sunday updates you want to process.

We recommend once a week.

The screenshot shows the Alma interface for the 'Community Zone Updates Task List'. A red arrow points to the 'Review' button. Below it, the 'Submit Date Range' is set to '03/18/2018 - 03/21/2018'. A calendar pop-up is open, showing the date range from March 18 to April 9, 2018. A red arrow points to the date '8' (April 8, 2018) in the calendar, which is highlighted. The calendar also shows the dates '04/08/2018' and '04/09/2018' at the top.

March 2018							April 2018						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	1	2	3	25	26	27	28	29	30	31
4	5	6	7	8	9	10	1	2	3	4	5	6	7
11	12	13	14	15	16	17	8	9	10	11	12	13	14
18	19	20	21	22	23	24	15	16	17	18	19	20	21
25	26	27	28	29	30	31	22	23	24	25	26	27	28
1	2	3	4	5	6	7	29	30	1	2	3	4	5

Processing the Update

Community Zone Updates Task List

Dismiss SelectedExecuteBack

ReviewAll

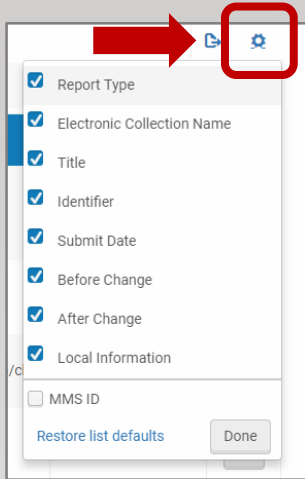
Submit Date Range04/08/2018 - 04/09/2018X

1 - 11 of 11Collection Name

Report Type : All

	Report Type	Electronic Collection Name	Title	Identifier	Submit Date	Before Change	After Change	Local Information
1	☐ Portfolio linking parameters update	Directory of Open Access Journals	International journal of group theory.	2251-7650	04/08/2018	jkey=http://ijgt.ui.ac...	jkey=http://www.theoryofgroups.ir	-
2	☐ Portfolio linking parameters update	EBSCOhost SPORTDiscus with Full Text	Journal of teaching in physical education	0273-5024	04/08/2018	jkey=ODO	jkey=ODO & exception2=atitle	-
3	☐ Portfolio linking parameters update	EBSCOhost SPORTDiscus with Full Text	Pediatric exercise science	0899-8493	04/08/2018	jkey=ODP	jkey=ODP & exception2=atitle	-

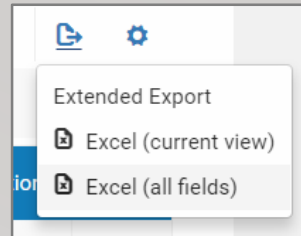
Tracking Your Progress



Report Type

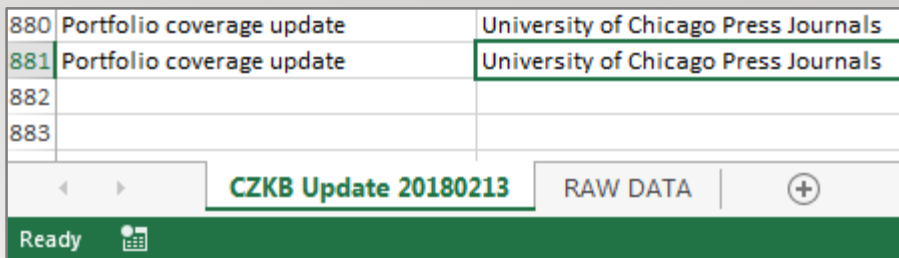
- ☒ Report Type
- ☒ Electronic Collection Name
- ☒ Title
- ☒ Identifier
- ☒ Submit Date
- ☒ Before Change
- ☒ After Change
- ☒ Local Information
- ☐ MMS ID

Restore list defaults Done



Extended Export

- Excel (current view)
- Excel (all fields)



880	Portfolio coverage update	University of Chicago Press Journals
881	Portfolio coverage update	University of Chicago Press Journals
882		
883		

Ready

CZKB Update 20180213 RAW DATA

Export Update data into Excel in order to:

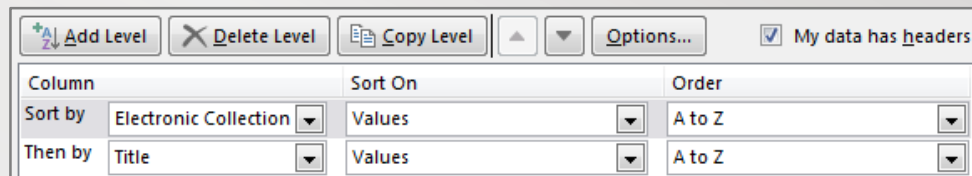
- Track progress
- ID collections to dismiss

Format Update data spreadsheet:

- Freeze top row
- Set columns to Filter
- Copy sheet as Raw Data

Sort Update data by:

- Electronic Collection
- Title



Sort by: Electronic Collection

Then by: Title

Sort On: Values

Order: A to Z

My data has headers

Using the Check or Ignore File

6. Compare collections in update export to *Check or Ignore in CZ Updates Task List* spreadsheet to identify collections you will immediately dismiss.



VERIFY in Update	Public Name	Public Name Override	Auto Activate	Electronic Collection Id	Proxy	Description	PO Number	PO Line Reference	Electronic Collection MMS ID	Activation Date
NO	ACM Digital Library		Yes	61175845320002952	Yes	Selective package	PO-6102	18186-gsudb	9934393053302952	2010-11-21
YES	AIP Journals (American Institute of Physics)	American Institute of Physics Journals	No	61175845360002952	Yes	Selective package	PO-11501	POL-4660	9934402053502952	2010-11-21
YES	AIP Scitation American Association of Physics		No	61175845330002952	Yes	Selective package				2010-11-21
YES	Akademiai Kiado		No	61175844300002952	Yes	Selective package				2014-07-22
YES	ALA ACRL Association of College and Research Libraries	Association of College & Research Libraries	No	61175844990002952	No	Selective package				2011-06-21

Tracking your progress

Check or Ignore in CZ Updates Task List.xlsx

VERIFY in Update	Public Name	Public Name Override	Auto Activate	Electronic Collection Id	Proxy	Description	PO Number
NO	DOAJ Directory of Open Access Journals	Directory of Open Access Journals	Yes	61175845730002952	No	Selective package	
NO	EBSCOhost Communication & Mass Media C		Yes	61175844280002952	Yes	Aggregator package	
NO	EBSCOhost Education Source		Yes	61175845030002952	Yes	Aggregator package	P-E-31594-3
NO	HeinOnline Law Journal Library		Yes	61175844130002952	Yes	Selective package	
YES	Highwire Press Journals		No	61175844350002952	Yes	Selective package	
NO	Internet Scientific Publications		Yes	61175844160002952	No	Selective package	

CZ Updates Task List_20180504kah(1680).xlsx

Report Type	Electronic Collection Name	Title	Identifie	Submit Da	Before Change	After Change	Local Informatio
Portfolio linking parameters up	Directory of Open Access Jour	Journal of world-systems rese	1076-156X	05/07/2018	jkey=http://www.jwsr.org/	jkey=http://jwsr.pitt.edu/ojs/index.php/jwsr/index	
Portfolio linking parameters up	EBSCOhost Communication & I	American journal of speech-la	1058-0360	05/07/2018	jkey=5E7	jkey=5E7 & exception2=atitle	
Portfolio linking parameters up	EBSCOhost Education Source	Reading improvement.	0034-0510	05/07/2018	jkey=0R5	jkey=0R5 & exception2=atitle	
Portfolio coverage update	Factiva	Financial Times (FT.Com)		05/07/2018	Available from 2000.	Available from 2000. Most recent 1 month(s) not availab	
Portfolio coverage update	Factiva	Financial Times (FT.Com)		05/07/2018	Available from 2000.	Available from 2000. Most recent 1 month(s) not availab	
Portfolio coverage update	HeinOnline Law Journal Library	Planning & environmental law	1548-0755	05/07/2018	Available from 1949 volume: 1	Available from 1949 volume: 1 until 2012 volume: 64.	
Portfolio deleted from non aut	Highwire Press Journals	The Journal of nutrition.	0022-3166	05/07/2018			
Portfolio coverage update	Internet Scientific Publications	The Internet journal of biologi		05/07/2018	null	Available from 2006 until 2017.	

CZ UPDATES TASK LIST

Dismissing Single Records

Community Zone Updates Task List

Dismiss Selected Execute Back

Review All

Submit Date Range 04/08/2018 - 04/09/2018 X

1 - 11 of 11 Collection Name

Report Type : All

	Report Type	Electronic Collection Name	Title	Identifier	Submit Date	Before Change	After Change	Local Information		
1	☐	Portfolio linking parameters update	Directory of Open Access Journals	International journal of group theory.	2251-7650	04/08/2018	jkey=http://ijgt.ui.ac...	jkey=http://www.theoryofgroups.ir	-	...
2	☐	Portfolio linking parameters update	EBSCOhost SPORTDiscus with Full Text	Journal of teaching in physical education	0273-5024	04/08/2018	jkey=0DO	jkey=0DO & exception2=atitle	-	...
3	☐	Portfolio linking parameters update	EBSCOhost SPORTDiscus with Full Text	Pediatric exercise science	0899-8493	04/08/2018	jkey=0DP	jkey=0DP & exception2=atitle	-	...

Dismiss Edit View hidden

Dismissing Multiple Records

Community Zone Updates Task List

Dismiss Selected Execute Back

Review All

Submit Date Range 04/08/2018 - 04/09/2018 X

1 - 11 of 11 Collection Name

Report Type : All

	Report Type	Electronic Collection Name	Title	Identifier	Submit Date	Before Change	After Change	Local Information
1	Portfolio linking parameters update	Directory of Open Access Journals	International journal of group theory.	2251-7650	04/08/2018	jkey=http://ijgt.ui.ac...	jkey=http://www.theoryofgroups.ir	-
2	Portfolio linking parameters update	EBSCOhost SPORTDiscus with Full Text	Journal of teaching in physical education	0273-5024	04/08/2018	jkey=ODO	jkey=ODO & exception2=atitle	-
3	Portfolio linking parameters update	EBSCOhost SPORTDiscus with Full Text	Pediatric exercise science	0899-8493	04/08/2018	jkey=ODP	jkey=ODP & exception2=atitle	-

CZ UPDATES TASK LIST

Examining the Changes

Community Zone Updates Task List

Dismiss Selected Execute Back

Review All

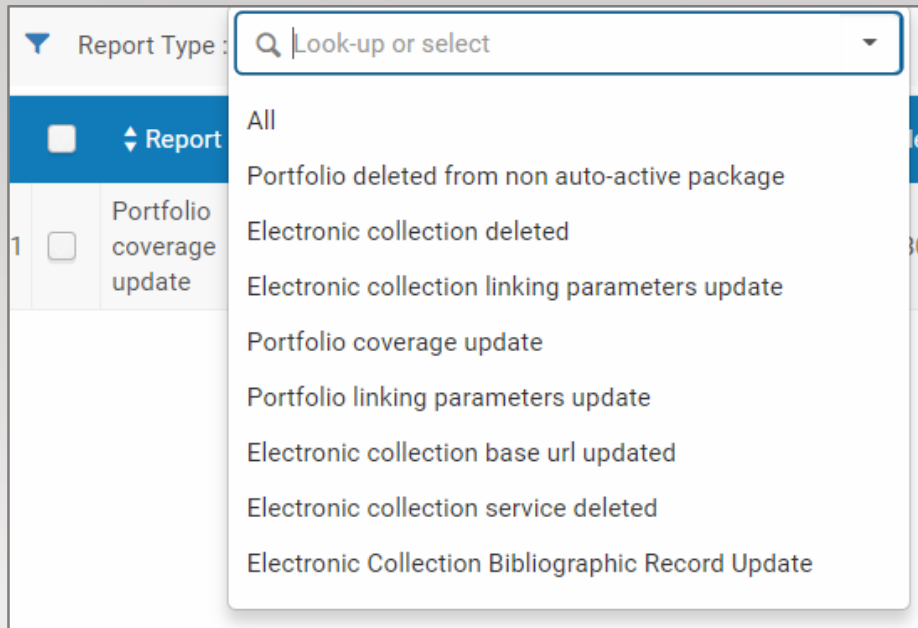
Submit Date Range 04/08/2018 - 04/09/2018 X

1 - 11 of 11 Collection Name

Report Type : All

	Report Type	Electronic Collection Name	Title	Identifier	Submit Date	Before Change	After Change	Local Information
1	☐ Portfolio linking parameters update	Directory of Open Access Journals	International journal of group theory.	2251-7650	04/08/2018	jkey=http://ijgt.ui.ac...	jkey=http://www.theoryofgroups.ir	- ...
2	☐ Portfolio linking parameters update	EBSCOhost SPORTDiscus with Full Text	Journal of teaching in physical education	0273-5024	04/08/2018	jkey=ODO	jkey=ODO & exception2=atitle	- ...
3	☐ Portfolio linking parameters update	EBSCOhost SPORTDiscus with Full Text	Pediatric exercise science	0899-8493	04/08/2018	jkey=ODP	jkey=ODP & exception2=atitle	- ...

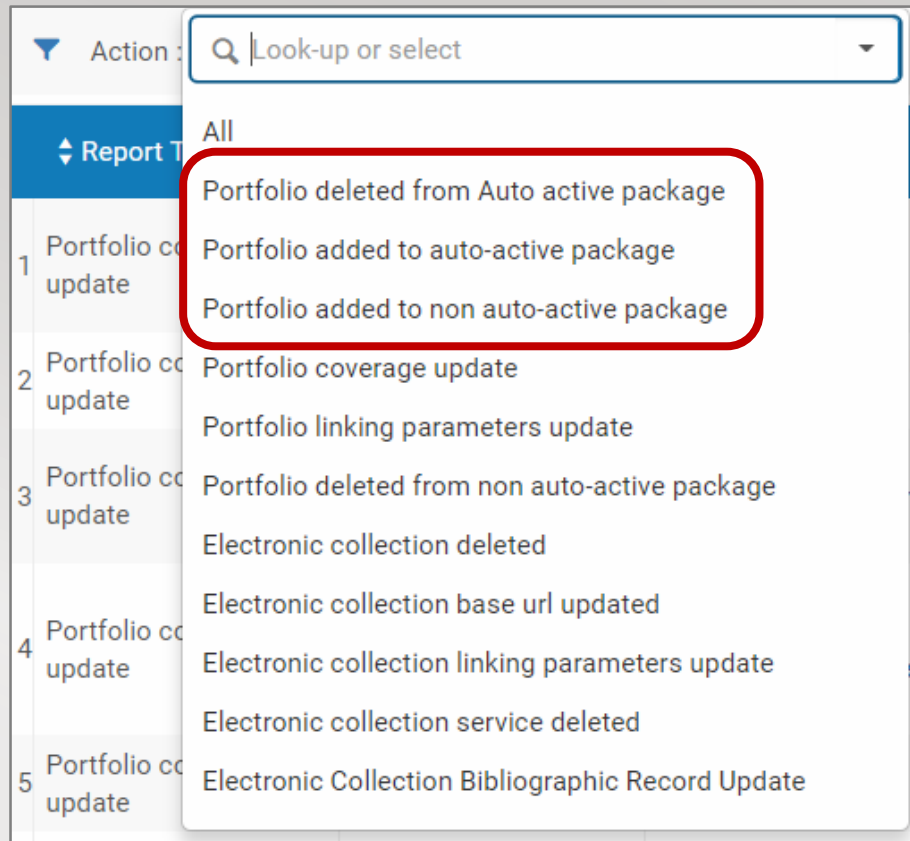
Filtering the List: Review Tab



Report Type Filters

- Electronic collection deleted
- Electronic collection service deleted
- Electronic Collection Bibliographic Record Update
- Electronic collection linking parameters update
- Electronic collection base url updated
- Portfolio deleted from non auto-active package
- Portfolio coverage update
- Portfolio linking parameters update

Filtering the List: All Tab



Action Filters

- Electronic collection deleted
- Electronic collection service deleted
- Electronic Collection Bibliographic Record Update
- Electronic collection linking parameters update
- Electronic collection base url updated
- Portfolio deleted from non auto-active package
- Portfolio coverage update
- Portfolio linking parameters update
- **Portfolio deleted from Auto active package**
- **Portfolio added to auto-active package**
- **Portfolio added to non auto-active package**

What To Look For

Working with the Community Zone Updates Task List has a useful table that describes the actions.

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/040Resource_Management/050Inventory/060Working_with_the_Community_Zone_Updates_Task_List#Actions_on_a_Collection_Following_a_Community_Zone_Update](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/060Working_with_the_Community_Zone_Updates_Task_List#Actions_on_a_Collection_Following_a_Community_Zone_Update)

Actions for Community Zone Updates			
Type	Action Name	Action Taken	Tab
Both (Auto-activation and Non auto-activation)	Electronic Collection linking parameters update	The action is performed. You can undo it by selecting Actions > Edit and manually restoring the previous value.	Both (Review and All)
	Electronic Collection base url updated	The action is performed. You can undo it by selecting Actions > Edit and manually restoring the previous value.	Both (Review and All)
	Electronic Collection service deleted	The electronic collection service is unlinked from the Community Zone and set to inactive. If you decide to keep the electronic collection service, select Actions > Edit and manually manage the electronic collection service from the Electronic Service Editor page. The institution icon (single building) appears in the Portfolios tab on the Electronic Service Editor page where you can select Actions > Remove to delete a portfolio.	Both (Review and All)

Examining the Changes

Community Zone Updates Task List

Dismiss Selected Execute Back

Review All

Submit Date Range 04/08/2018 - 04/09/2018 X

1 - 11 of 11 Collection Name

Report Type : All

	Report Type	Electronic Collection Name	Title	Identifier	Submit Date	Before Change	After Change	Local Information
1	☐ Portfolio linking parameters update	Directory of Open Access Journals	International journal of group theory.	2251-7650	04/08/2018	jkey=http://ijgt.ui.ac...	jkey=http://www.theoryofgroups.ir	-
2	☐ Portfolio linking parameters update	EBSCOhost SPORTDiscus with Full Text	Journal of teaching in physical education	0273-5024	04/08/2018	jkey=ODO	jkey=ODO & exception2=atitle	-
3	☐ Portfolio linking parameters update	EBSCOhost SPORTDiscus with Full Text	Pediatric exercise science	0899-8493	04/08/2018	jkey=ODP	jkey=ODP & exception2=atitle	-

What to look for

The screenshot shows the 'Community Zone Updates Task List' interface. At the top, there are buttons for 'Dismiss Selected', 'Execute', 'Cancel', and 'Back'. Below this, there are tabs for 'Review' and 'All'. A 'Submit Date Range' filter is set to '04/08/2018 - 04/09/2018'. A search bar for 'Collection Name' is present. A red arrow points to the 'Report Type' dropdown menu, which is currently set to 'Portfolio coverage update'. Three other red arrows point to the 'Before Change', 'After Change', and 'Local Information' columns of the table below.

	Report Type	Electronic Collection Name	Title	Identifier	Submit Date	Before Change	After Change	Local Information
1	Portfolio coverage update	Taylor & Francis Social Science and Humanities Library	Asian affairs.	0306-8374	04/08/2018	Available from 1998 volume: 29 issue: 1.	Available from 1997 volume: 28 issue: 1.	-

- Test access
- Determine if change is correct

What To Look For – Electronic Collections

Added – Generally not relevant at collections level; Be aware of new collections to activate

Deleted – Collections or Services

Updated – Bibliographic Records, Linking Parameters, and URLs

What To Look For – Portfolios

Added – Dependent on package type and service settings

Deleted – Becomes local IZ portfolio

Updated – Does change impact local settings?

Actions: Test, Test, Test!

Added – Was it activated? Is change correct?

Deleted – Do you still have access to it? Is change correct?

Updated – Does change duplicate local settings? Is change correct?

Questions

