Wrangling cats: Managing e-content for migration

Jessica Lee | Valdosta State University
Whitney Bates-Gómez | Georgia State University
GUGM 2024
About Jessica and Whitney

Jessica

- Electronic Resources & Serials Librarian at VSU since 2013
- Previously used HLM when the USG was on Voyager
- Electronic Resources Lead for the FOLIO Migration

Whitney

- Electronic and Continuing Resources & Serials Librarian at Georgia State since 2019.
- Completed a migration to Ex Libris Alma and Primo with previous library.
Table of Contents

- Common examples of inactive portfolios
- How to resolve these issues
- Licenses and reporting
- Crosswalk of terminology
- Differences between HLM & Alma
- New workflows
Types of Inactive Portfolios: Duplicate Coverage

Example: Title is deactivated, but present in other collections.

Resolution 1: Keep and have title activated in two places.
Types of Inactive Portfolios: Duplicate Coverage

Example: Title is inactivate, but present in other collections.

Resolution 2: Delete and have portfolio activated in just one collection.
Types of Inactive Portfolios: Specialty Collections

Example: DDA/EBA/PDA titles that are inactive until triggered

Resolution: Case-by-case, but may need to consult your cataloguing librarian.
Recommendation: Pause on these, due to the nature of subscriptions services in FOLIO/HLM.
Helpful hints - Inactive Portfolios

Look for inactive portfolios in Alma instead of using report in Analytics.
Helpful hints - Inactive Portfolios

Electronic Portfolios - History

Who changed the Availability from Available to Not Available?
A person or “System”?

<table>
<thead>
<tr>
<th>▼ Date</th>
<th>Operator</th>
<th>▲ Field Name</th>
<th>Old Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 05/06/2024 03:47:57 AM EDT</td>
<td>System</td>
<td>Electronic material type</td>
<td>-</td>
<td>Video</td>
</tr>
<tr>
<td>2 05/06/2024 03:47:57 AM EDT</td>
<td>System</td>
<td>Availability</td>
<td>Available</td>
<td>Not Available</td>
</tr>
</tbody>
</table>
Helpful hints - Inactive Portfolios

Try filtering by Interface or Electronic Material Type.

**Interface**
- Alexander Street (2)
- Ebook Central (1)
- EBSCOhost (3)
- Elsevier ScienceDirect (2)
- Free E-Journals (1)
- Galegroup (4)
- JSTOR (1)
- Miscellaneous Ejournals (1)
- Oxford Reference Online (4)
- Wiley Online Library (1)

**Electronic Material Type**
- Book (9)
- Journal (9)
- Video (2)
DDA, EBA, & other acquisitions methods

EBook Central
To get a better handle on what your library licenses for DDA and other non-traditional acquisition methods.

Pull reports from the vendor web page instead of including all potential titles in your DDA profile.

Purchased titles
Once a title is purchased, it moves to “Owned titles”
Types of Inactive Portfolios: Deactivated in CZ

Example: Alma deactivates a CZ record and localizes it.

Resolution: Reactivate the title in CZ.
Types of Inactive Portfolios, Deactivated in CZ

Example: Alma deactivates a CZ records and localizes it.

Resolution: Manually rerun Autoholdings job.
Using License Agreements

VII. Term and Termination

These T&C shall be in effect from January 1, 2022 through December 31, 2024 (the “Term”).

Exhibit I – Pricing

SAGE Premier 2021 Fixed List

2022 Maintained Holdings: $ 
Upgrade Holdings: $ 

Access Fee

2022 - 
2023 - 
2024 - 

Using EBSCOnet

Does it have perpetual access?

Organization Information

Name: Human Kinetics Publishers/single titles

URL for content: https://journals.humankinetics.com/page/journals/our-journals

Access Information

Access: ALL WITH CURRENT - If subscription lapses, subscriber does not retain access on the publisher's site. Perpetual access (post cancellation access) is only provided through ProQuest membership.

Remote access allowed: Yes
Using EBSCO.net

What year does my coverage begin?

Access Information

Access: FIXED - Current subscription includes content from 1999 to current where available. If subscription lapses, subscriber retains access to paid content.

Organization Information

Name: SAGE Publications Inc
URL for content: https://journals.sagepub.com/
Crosswalk of Alma and HLM terminology

**Alma**

All functionality resides in one place

- Electronic content information is housed in a portfolio.

**HLM**

(Holdings & Link Management)

- E-content is activated in HLM. Orders and licenses reside in FOLIO
- FOLIO eholdings app & HLM have bidirectional communication
Crosswalk of Alma and HLM terminology

Alma
Can filter by different factors when searching in the CZ

HLM
Less options to filter results
Crosswalk of Alma and HLM terminology

Spreadsheet of more Alma to HLM Crosswalk Terminology

An example: Searching for a Journal
Crosswalk of Alma and HLM terminology

<table>
<thead>
<tr>
<th>Package Name</th>
<th>Vendor</th>
<th>Package Type</th>
<th>Content Type</th>
<th>Available Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAGE Premier 2021 (3Rel)</td>
<td>SAGE</td>
<td>Complete</td>
<td>E-Journal</td>
<td>987</td>
</tr>
<tr>
<td>SAGE Journals New Premier 2021</td>
<td>SAGE</td>
<td>Complete</td>
<td>E-Journal</td>
<td>30</td>
</tr>
<tr>
<td>SAGE Journals Premier 2021</td>
<td>SAGE</td>
<td>Complete</td>
<td>E-Journal</td>
<td>1,234</td>
</tr>
</tbody>
</table>

Alma Collections

HLM

Uses Packages and Collections interchangeably.
Differences between Alma & HLM

**ALMA**
- PO, license, coverage dates, proxy, and etc all reside within the portfolio and/or collection.
- Deleted portfolios, orders, inventory, and etc. can be revived from the deleted repository.
- Can be very complicated. Alma uses specific terminology when dealing with e-content.

**HLM and FOLIO**
- E-content can reside in both HLM and FOLIO
- There are different modules for workflows: Licensing, Inventory, and HLM is not a part of FOLIO.
- Can only search by title, publisher, ISSN/ISBN, Subject, packages, or vendor.
- Publisher ≠ Vendor
- Notes created at global level then associated with package, title, etc.
- Less of a learning curve.
Workflow Revision

Activating new titles
Once your e-content migrates to HLM, any new content will need to be activated in two places (HLM & Alma) in order to keep information current before go-live.

Orders live in FOLIO
Dealing with e-content is siloed in FOLIO. Orders, licenses, access model, etc are in FOLIO.

Implementation
All institutions will likely need to revamp workflows post-migration as content will no longer live in just one location.

Once we get FOLIO, try and do your workflows now so you can ask all the questions.
Thank you! Any questions?

Jessica Lee
jessicalee@valdosta.edu

Whitney Bates-Gómez
wbatesgomez@gsu.edu

Slide layout and design from Slidesoo