KAT HART
Electronic and Continuing Resources Librarian

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
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_AvZdXl0RQDNHG/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
What is the Community Zone Update?

Synchronize Changes from CZ job

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

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

Collection name: American Physical Society Journals
Collection ID: 61175844790002952
Service type: Full Text
Service ID: 62175847020002952
Provider package: 3MX
code (DB ID)

Activation Information:
- Service activation status:
  - Not Available
  - Available

- Activate new portfolios associated with service automatically:
  - No
  - Yes

Active from date: 11/20/2010
Service temporarily unavailable message:
- No
- Yes

Active until date
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”

<table>
<thead>
<tr>
<th>Public Name</th>
<th>Public Name Override</th>
<th>Auto Activate</th>
<th>Electronic Collection Id</th>
<th>Proxy</th>
<th>Description</th>
<th>PO Number</th>
<th>PO Line Reference</th>
<th>Electronic Collection MMS ID</th>
<th>Activation Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACM Digital Library</td>
<td></td>
<td>Yes</td>
<td>61175845320002952</td>
<td>Yes</td>
<td>Selective package</td>
<td>PO-6102</td>
<td>18186-gtubh</td>
<td>993439305302952</td>
<td>2010-11-21</td>
</tr>
<tr>
<td>AIP Journals (American Institute of Physics)</td>
<td>American Institute of Physics Journals</td>
<td>No</td>
<td>61175845360002952</td>
<td>Yes</td>
<td>Selective package</td>
<td>PO-11501</td>
<td>POL-4660</td>
<td>993440205303952</td>
<td>2010-11-21</td>
</tr>
<tr>
<td>AIP Scitation (American Association of Physics)</td>
<td></td>
<td>No</td>
<td>61175845330002952</td>
<td>Yes</td>
<td>Selective package</td>
<td></td>
<td></td>
<td></td>
<td>2010-11-21</td>
</tr>
<tr>
<td>Akademie Kiindo</td>
<td></td>
<td>No</td>
<td>61175844300002952</td>
<td>Yes</td>
<td>Selective package</td>
<td></td>
<td></td>
<td></td>
<td>2014-07-22</td>
</tr>
<tr>
<td>ALA ACRL Association of College and Research Association of College &amp; Research Libraries</td>
<td></td>
<td>No</td>
<td>61175844490002952</td>
<td>No</td>
<td>Selective package</td>
<td></td>
<td></td>
<td></td>
<td>2011-06-21</td>
</tr>
</tbody>
</table>

- 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
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.
### CZ UPDATES TASK LIST

**Processing the Update**

#### Community Zone Updates Task List

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Electronic Collection Name</th>
<th>Title</th>
<th>Identifier</th>
<th>Submit Date</th>
<th>Before Change</th>
<th>After Change</th>
<th>Local Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Portfolio linking parameters update</td>
<td>Directory of Open Access Journals</td>
<td>2251-7650</td>
<td>04/08/2018</td>
<td>jkey=<a href="http://ijgt.ui.ac">http://ijgt.ui.ac</a>...</td>
<td>jkey=<a href="http://www.theoryofgroups.ir">http://www.theoryofgroups.ir</a></td>
<td>-</td>
</tr>
<tr>
<td>2</td>
<td>Portfolio linking parameters update</td>
<td>EBSCOhost SPORTDiscus with Full Text</td>
<td>0273-5024</td>
<td>04/08/2018</td>
<td>jkey=000</td>
<td>jkey=000 &amp; exception2=atitle</td>
<td>-</td>
</tr>
<tr>
<td>3</td>
<td>Portfolio linking parameters update</td>
<td>EBSCOhost SPORTDiscus with Full Text</td>
<td>0899-8493</td>
<td>04/08/2018</td>
<td>jkey=000</td>
<td>jkey=000 &amp; exception2=atitle</td>
<td>-</td>
</tr>
</tbody>
</table>
Tracking Your Progress

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

**Check or Ignore in CZ Updates Task List.xlsx**

<table>
<thead>
<tr>
<th>VERIFY in Updates</th>
<th>Public Name</th>
<th>Public Name Override</th>
<th>Auto Activate</th>
<th>Electronic Collection Id</th>
<th>Proxy</th>
<th>Description</th>
<th>PO Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>NO</td>
<td>DOAJ Directory of Open Access Journals</td>
<td>Directory of Open Access Journals</td>
<td>Yes</td>
<td>61758454730002952</td>
<td>No</td>
<td>Selective package</td>
<td></td>
</tr>
<tr>
<td>NO</td>
<td>EBSCOhost Communication &amp; Mass Media C</td>
<td></td>
<td>Yes</td>
<td>6175844280002952</td>
<td>Yes</td>
<td>Aggregator package</td>
<td>P-E-31594-3</td>
</tr>
<tr>
<td>NO</td>
<td>EBSCOhost Education Source</td>
<td></td>
<td>Yes</td>
<td>61758443160002952</td>
<td>No</td>
<td>Selective package</td>
<td></td>
</tr>
<tr>
<td>NO</td>
<td>HeinOnline Law Journal Library</td>
<td></td>
<td>Yes</td>
<td>6175844350002952</td>
<td>Yes</td>
<td>Selective package</td>
<td></td>
</tr>
<tr>
<td>YES</td>
<td>Highwire Press Journals</td>
<td></td>
<td>No</td>
<td>61758441600002952</td>
<td>Yes</td>
<td>Selective package</td>
<td></td>
</tr>
<tr>
<td>NO</td>
<td>Internet Scientific Publications</td>
<td></td>
<td>Yes</td>
<td>61758441600002952</td>
<td>No</td>
<td>Selective package</td>
<td></td>
</tr>
</tbody>
</table>

### CZ Updates Task List_20180504kah(1680).xlsx

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Electronic Collection Name</th>
<th>Title</th>
<th>Identiﬁer</th>
<th>Submit Date</th>
<th>Before Change</th>
<th>After Change</th>
<th>Local Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portfolio linking parameters</td>
<td>EBSCOhost Communication &amp; American Journal of speech-lang</td>
<td>Reading improvement</td>
<td>1058-0690</td>
<td>05/07/2018</td>
<td>jkey=E7</td>
<td>jkey=E7 &amp; exception2=article</td>
<td></td>
</tr>
<tr>
<td>Portfolio linking parameters</td>
<td>EBSCOhost Education Source</td>
<td>Reading improvement</td>
<td>0034-0510</td>
<td>05/07/2018</td>
<td>jkey=OR5</td>
<td>jkey=OR5 &amp; exception2=article</td>
<td></td>
</tr>
<tr>
<td>Portfolio coverage update</td>
<td>Factiva</td>
<td>Financial Times (FT.Com)</td>
<td>09/07/2018</td>
<td>Available from 2000.</td>
<td>Available from 2000. Most recent 1 month(s) not available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portfolio coverage update</td>
<td>Factiva</td>
<td>Financial Times (FT.Com)</td>
<td>09/07/2018</td>
<td>Available from 2000.</td>
<td>Available from 2000. Most recent 1 month(s) not available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portfolio deleted from non auth Highwire Press Journals</td>
<td>The Journal of nutrition</td>
<td>0022-3156</td>
<td>09/07/2018</td>
<td>null</td>
<td>Available from 2000 until 2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portfolio coverage update</td>
<td>Internet Scientific Publications</td>
<td>The Internet Journal of biology</td>
<td>0022-3156</td>
<td>09/07/2018</td>
<td>null</td>
<td>Available from 2000 until 2017</td>
<td></td>
</tr>
</tbody>
</table>
## Dismissing Single Records

### Community Zone Updates Task List

<table>
<thead>
<tr>
<th>Portfolio linking parameters update</th>
<th>Electronic Collection Name</th>
<th>Title</th>
<th>Identifier</th>
<th>Submit Date</th>
<th>Before Change</th>
<th>After Change</th>
<th>Local Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>EBSCOhost SPORTDiscus with Full Text</td>
<td>Journal of Teaching in Physical Education</td>
<td>0273-5024</td>
<td>04/08/2018</td>
<td>jkey=6DO</td>
<td>jkey=6DO &amp; exception2=attt</td>
<td>Edit, View hidden</td>
</tr>
<tr>
<td>3</td>
<td>EBSCOhost SPORTDiscus with Full Text</td>
<td>Pediatric Exercise Science</td>
<td>0899-8493</td>
<td>04/08/2018</td>
<td>jkey=6DP</td>
<td>jkey=6DP &amp; exception2=attt</td>
<td></td>
</tr>
</tbody>
</table>
Dismissing Multiple Records
Examining the Changes

Community Zone Updates Task List

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Electronic Collection Name</th>
<th>Title</th>
<th>Identifier</th>
<th>Submit Date</th>
<th>Before Change</th>
<th>After Change</th>
<th>Local Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Portfolio linking parameters update</td>
<td>EBSCOhost SPORTDiscus with Full Text</td>
<td>Journal of teaching in physical education</td>
<td>0273-5024</td>
<td>04/08/2018</td>
<td>jkey=0DO</td>
<td>jkey=0DO &amp; exception2=atitle</td>
</tr>
<tr>
<td>3</td>
<td>Portfolio linking parameters update</td>
<td>EBSCOhost SPORTDiscus with Full Text</td>
<td>Pediatric exercise science</td>
<td>0899-8493</td>
<td>04/08/2018</td>
<td>jkey=0DP</td>
<td>jkey=0DP &amp; exception2=atitle</td>
</tr>
</tbody>
</table>
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

CZ UPDATES TASK LIST
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

<table>
<thead>
<tr>
<th>Type</th>
<th>Action Name</th>
<th>Action Taken</th>
<th>Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Both (Auto-activation and Non auto-activation)</td>
<td>Electronic Collection linking parameters update</td>
<td>The action is performed. You can undo it by selecting Actions &gt; Edit and manually restoring the previous value.</td>
<td>Both (Review and All)</td>
</tr>
<tr>
<td></td>
<td>Electronic Collection base url updated</td>
<td>The action is performed. You can undo it by selecting Actions &gt; Edit and manually restoring the previous value.</td>
<td>Both (Review and All)</td>
</tr>
<tr>
<td></td>
<td>Electronic Collection service deleted</td>
<td>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 &gt; 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 &gt; Remove to delete a portfolio.</td>
<td>Both (Review and All)</td>
</tr>
</tbody>
</table>
Examining the Changes

CZ UPDATES TASK LIST
What to look for

- 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