

Alma March 2016 Release:  
**Great Inventions  
Around the Alma World**  
Belgium - Gerardus Mercator  
The Mercator Projection



## SFX to Alma Migration Guide

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# 1

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## High Level Migration Scope

### *Inventory*

- Globally managed, active entities (these will automatically be linked to the Central Knowledge Base within the Alma Community Zone):
  - Targets
  - Target Services (Full Text, Selected Full Text). For more information, see the [Other SFX Services](#) section on page 13.
  - Object Portfolios/Objects (serials, monographs)
- Locally managed, active/inactive entities (these will be locally managed institutional level electronic inventory resources):
  - Targets
  - Target Services
  - Object Portfolios/Objects

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## Overview of SFX to Alma Migration

The purpose of this document is to explain the following:

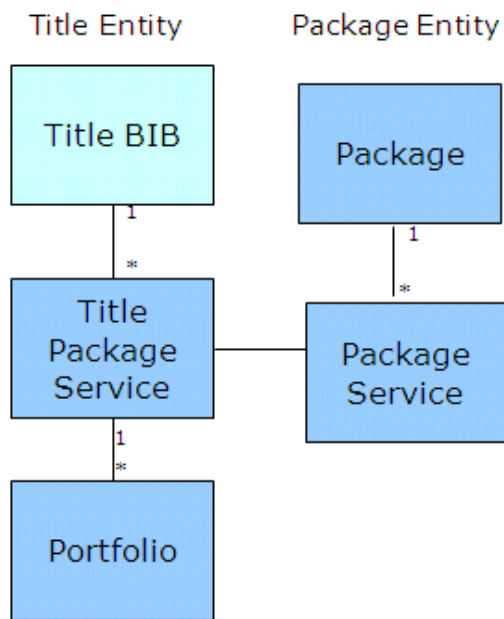
- An Overview of the scope and terms related to migrating SFX to Alma
- The input or information that you will need to supply to Ex Libris regarding SFX migration to Alma.
- The rules and assumptions that will be applied to the SFX data upon migration to Alma

Prerequisite: basic knowledge of Alma and SFX key concepts and architecture.

A few key terms to understand SFX in Alma terms:

SFX	Alma
Targets	Packages
Target Services	Package / Portfolio Services
Object Portfolios	Portfolios
Objects	Bibliographic records (Global objects will be linked to the KB/CZ Bibliographic record and Local objects will become locally managed Bibliographic records)

## ALMA's E-Inventory Model



### Some Key Definitions:

- **CKB/CZ** – Central Knowledge Base of E-resources. Managed by Ex Libris in the CZ and includes info on the different e-offerings available from data providers including linking and coverage information as well as bibliographic enhanced CONSER records Journal titles. E-books being considered.
- **E-Titles (Inventory)** – An electronic resource (e.g. e-journal =Science, e-book=Harry Potter and the Deathly Hallows). Titles include a link to the e-inventory (portfolio or stand-alone – see below) and to the Bibliographic record (in CZ for CZ/Global portfolios or to local Bib for local portfolios and stand-alones).
- **Package (Inventory)** – A collection of electronic portfolios from a specific data provider - includes provider name, package name, services supported by the package and admin/access info. Currently, does not have its own Marc Bibliographic data, but rather key package descriptive fields. Does **not** get published. Types: Aggregator and Selective. Analogous to SFX target.
- **Package Service** – The particular services a package offers in any of its portfolios (e.g. full text, etc.). Analogous to SFX Target service.
- **Title Package Service** – The service a particular individual title instance offers within a package.
- **Portfolio (Inventory)** – The specific coverage, services and link information relevant for a particular title within a package. May include admin/access info. May be local or global. Analogous to SFX Object Portfolio.

- **Stand-alone (Inventory)** – A local electronic resource not part of a package that is purchased alone and has its own specific linking info and is currently not managed from the Community Zone - often just a URL.

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## Input Required for SFX Migration

By default, the SFX migration extracts data for each institute defined in your instance, including all activations that are available for each institute via SFX groups, default SFX INSTITUTE, or specific activations for that institute. Unless you are migrating to separate institutions in Alma (where each institute loads to a separate Alma institution) each institute's activations are loaded to your single Alma institution. In this case, each institute's activation in Alma attains the originating SFX institute ownership in order to differentiate activations that may have been available in more than one institute in SFX and which is now subject to duplicate activations in Alma.

Additionally, Ex Libris must have ssh access to your SFX instance and an SFX minimum version of SFX 4.1.2 (Nov 2012 version of SFX or later).



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## SFX to Alma Migration Rules

This section describes the SFX areas and fields that are being migrated to Alma.

### SFX Data Elements

The following is a list of data elements that are converted from SFX. For more information on these elements, refer to the [SFX General User's Guide](#):

#### TARGET > PACKAGE

- Target internal name
- Global public name
- Local public name
- Global threshold
- Local threshold
- Indication of which threshold is active
- Character Set
- Aggregator
- Authentication note
- General note
- Internal note
- **Indication if the target is a local target**

- Institute information- public name

## TARGET SERVICE > PACKAGE SERVICE

- Service
- Global public name
- Local public name
- Site down
- Site down date
- Site down reason
- Is free
- Global parser
- Local parser
- Global parse param
- Local parse param
- Linking param
- Linking value
- Autoactive
- Autoupdate
- Use proxy
- Crossref supported
- crossref disabled
- Linking param
- Linking value
- Authentication\_note
- General\_note
- Internal\_note
- Indication if the target service is a local target service
- Institute information- Public name, Auto active, Proxy, Local threshold, Linking parameters, Linking values

## OBJECT PORTFOLIO > PORTFOLIO

- Object
- Global parser
- Local parser
- Global threshold
- Local threshold
- Indication of which threshold is active
- Global parse param
- Local parse param
- Linking param
- Linking value
- Proxy
- Authentication\_note
- General\_note
- Internal\_note
- **Indication if the portfolio is a local portfolio**

## LOCAL OBJECT > BIBLIOGRAPHIC

**Note:** Global Object Bibliographic Records Linked/Managed in KB/CZ

- Type
- Language
- Identifiers
- Titles
- Authors
- Publisher information (date, place, name)
- **Indication if it is a local object**
- Institute information- Proxy, Local threshold, Linking parameters, Linking values, Site down

## Areas/Fields Not In Scope

- Active Target services which are TOC/Abstract
- Inactive Global Targets/Target Services/Portfolios/Objects

- Local target parsers
- Local e-inventory material type

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## Other SFX Services

Many of the services not migrated are implemented in Alma differently than in SFX. Others can be leveraged from Primo. The following table describes the SFX service types and their equivalent functionality in the Alma/Primo solution.

Service Type	Leveraged in Alma/Primo	Details
Full text / Selected Full text	Alma	Migrated and leveraged by Alma, similar to SFX resolution.
A-Z list	Primo	Requires Primo v 4.01+ For more information, refer to the <a href="#">Primo Back Office Guide</a> .
Document Delivery	Alma	Document delivery is offered as part of U-resolver services and is based on fulfillment policy. For more information, refer to the Alma online documentation.
Search/link to external provider targets (e.g. Google Scholar, Amazon book review)	Primo	Part of core Primo configuration options. For more information, refer to the <a href="#">Primo Back Office Guide</a> .
Availability to Primo Central / Google Scholar	Alma	Part of the Alma publishing processes.
Citation / End Note / Ref works	Primo	Part of the core Primo configuration options. For more information, refer to the <a href="#">Primo Back Office Guide</a> .

Service Type	Leveraged in Alma/Primo	Details
DOI resolution	Alma	U-resolver services offer DOI resolution. For more information, refer to the Alma online documentation.
Citation link builder service	Primo	Part of the core Primo configuration options. For more information, refer to the <a href="#">Primo Back Office Guide</a> .
All non-full text/TOC/abstract/document delivery services	Alma	Alma general electronic services allow generic linking. Primo configuration also has various external linking options.