



The State University of New York

New MD Editor Series: Splitting Electronic Portfolios From Physical Bib Records

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Splitting Inventory

- Physical and electronic inventory should be on separate bib records in Alma
 - Physical = Holdings with items
 - Electronic = Portfolios
- Electronic portfolios should not be ordered from a Network Zone (NZ) or Institution Zone (IZ) physical format bib record. Electronic portfolios should be ordered in Alma from either the:
 1. Community Zone (CZ)
 2. Institution Zone (IZ)
- Bib records with physical and electronic inventory in Alma may have:
 1. Migrated on the same bib record because physical and electronic inventory was on the same bib record in Aleph and the Aleph number was included on the P2E form
 2. Accidentally ordered electronic portfolios on the physical bib record in Alma



Splitting Inventory

- The P2E process:
 1. Created the electronic portfolio on the physical bib record
 2. Created an IZ only electronic portfolio
 - The IZ electronic portfolios are not linked to the CZ and will, therefore, have an IZ icon
 3. 865 \$u was used to add the linking information to the portfolio
 - MARC 856 did not migrate in the bib record unless otherwise specified during migration
 4. Included the electronic provider name if the information was included in 856 \$z
 - This is helpful to determine which CZ electronic collection the electronic portfolio should be linked to



Splitting Inventory

- Electronic portfolios:
 - Must be split record by record because there are no jobs in Alma that can split inventory
 - The URL in the portfolio editor can be used to help identify the electronic collection if the collection name is not populated from migration
- Steps to Split electronic portfolios from physical bib records:
 1. Identify electronic portfolios to be split
 2. Review electronic portfolios to be split
 3. Relink electronic portfolios or Delete electronic portfolios



Identify Inventory to Split



Identify Inventory to Split

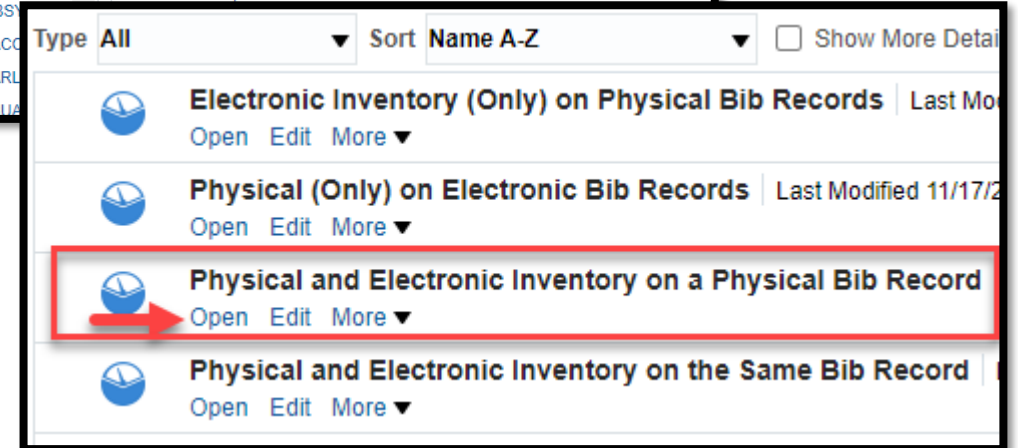
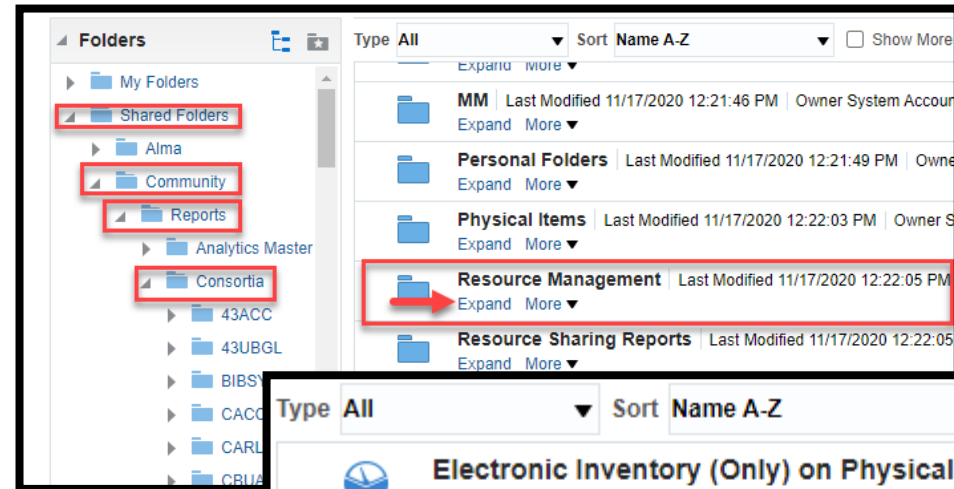
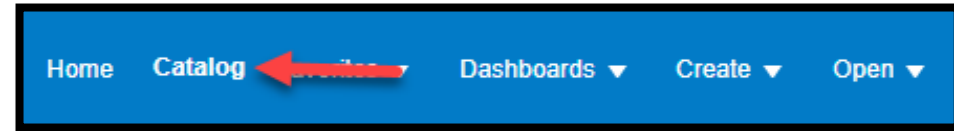
- Inventory that needs to be split can be identified:
 - Individually during typical workflows
 - Analytics report
- The following analytics reports can be used to identify inventory that needs to be split:
 1. Physical and Electronic Inventory on a Physical Bib Record
 - Identifies portfolios to be split
 2. Electronic Inventory Only on Physical Bib Records
 - Identifies portfolios not linked to the CZ that need to be split
 - The bib records may or may not have other inventory
 3. Physical and Electronic on the Same Bib Record
 - Identifies either physical inventory or portfolios that need to be split
- The following role is required to access analytics:
 - Designer Analytics



Identify Inventory to Split

To access the “Physical and Electronic Inventory on a Physical Bib Record” report

1. Go to *Analytics>Analytics>Design Analytics*
2. Click *Catalog*
3. Expand the "Shared Folders"
4. Expand the "Community" folder
5. Expand the "Reports" folder
6. Expand the "Consortia" folder
7. Expand the "SUNY" folder
8. Expand the "Resource Management" folder
9. Click *Open* from the "Physical and Electronic Inventory on a Physical Bib Record" report



Path: /Share Folders/Community/Reports/Consortia/SUNY/Resource Management



Review Electronic Portfolios to be Split

Review Electronic Portfolios to be Split

To review the electronic portfolio to be split:

1. Perform an "All Titles: [Keywords or MMS ID]: [MMS ID]" repository search to view both physical and electronic inventory:

All titles ▾ MMS ID ▾ 990000160020204803 X Home ▾ Search

1 **The Founders' Constitution / edited by Philip B. Kurland and Ralph Lerner.** [Edit Record](#) [Portfolio List](#) [...](#)

Book {Book - Physical} text; unmediated; volume By Kurland, Philip B., (Chicago : University of Chicago Press, 1987.)

Language: English
ISBN: 0226463877 and others
MMS ID: 990000160020204803

Subject: Constitutional history--United States--Sources. Constitutional history. Staatsinrichting. and others
Record number: (OCoLC)13358566

Creation Date: 06/16/2019 11:51:43 EDT
Modification Date: 08/14/2020 21:12:53 EDT

Physical (1) Electronic (1) Digital [Other details](#)

2. Perform an "Electronic Portfolio: Title: Title" repository search to see if the electronic portfolio already exists in either the IZ or the CZ:

Electronic portfolios ▾ Title ▾ The Founders' Constitution X Home ▾ Search



Review Electronic Portfolios to be Split

To review the electronic portfolio to be split:

3. Determine how to handle the electronic portfolio being split:
 1. If it is an IZ electronic portfolio is being split from a physical bib record because a portfolio does not already exist:
 1. Determine the collection the portfolio needs to be linked to
 - The link can be found on the Linking tab of the portfolio if the electronic collection is not populated
 2. Use “Link to Community” workflow to link the IZ electronic portfolio to the CZ
 2. If it is a CZ electronic portfolio being split from a physical bib record because a portfolio does not already exist:
 1. Use "Relink to another bibliographic record" workflow to relink the electronic portfolio to the CZ bib record



Review Electronic Portfolios to be Split

To review the electronic portfolio to be split:

3. Determine how to handle the electronic portfolio being split continued:
 3. If the IZ portfolio will not be linked to the CZ
 1. Export the electronic format bib record from OCLC to the IZ
 2. Relink the portfolio to the exported bib using "Relink to another bib record" and select the IZ bib record
 3. Edit the portfolio and select "Attach to an electronic collection" to add it to a local or CZ collection
 4. Delete the electronic portfolio being split if another portfolio already exists either
 - Manually from the electronic portfolio OR
 - Using the "Delete Portfolios" job for an "Electronic Portfolio" set created using the portfolio ids



Review Electronic Portfolios to be Split

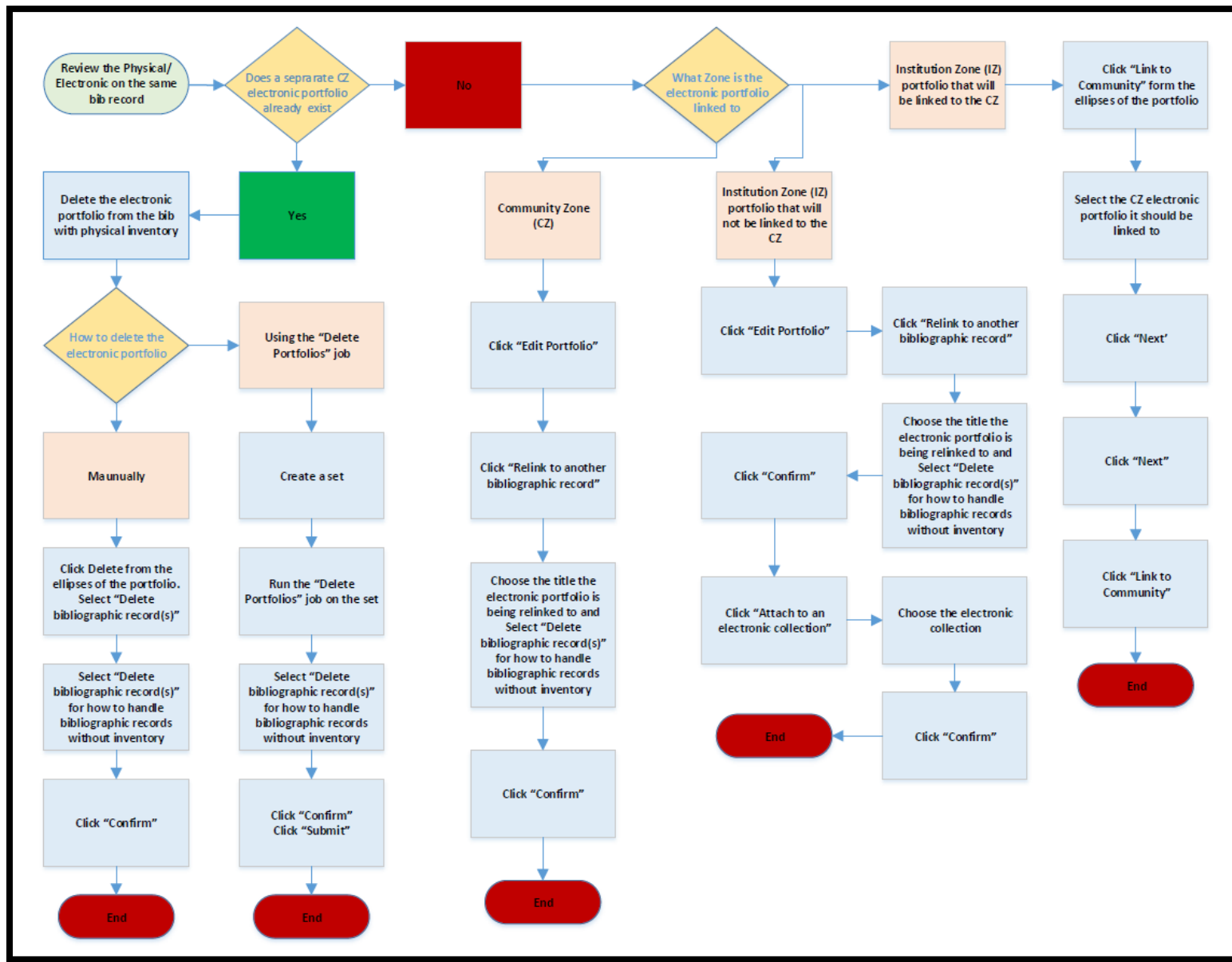
To review the electronic portfolio to be split:

4. Determine whether to use the CZ descriptive record
 - If you do not want to use the CZ descriptive record:
 1. Export the electronic format bib record from OCLC to the IZ
 2. Relink the portfolio to the exported bib using "Relink to another bib record" and select the IZ bib record
 3. Then, link the IZ portfolio to the CZ collection using "Link to Community"



Splitting Electronic Portfolios from Physical Bib Records

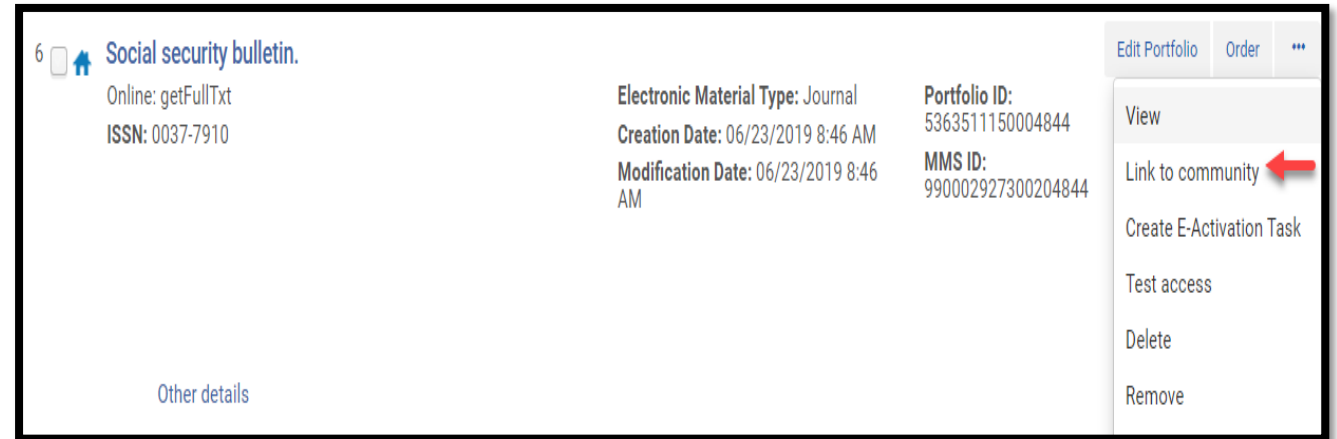
Splitting Electronic Portfolios from Physical Bib Records Workflow Flowchart



Splitting Electronic Portfolios from Physical Bib Records

IZ electronic portfolio to be split that will be linked to the CZ:

1. Perform an "**Electronic Portfolio**" repository search for the electronic portfolio to be split
2. Click **Link to Community** from the ellipses
3. Click on the radio button next to the electronic portfolio/collection to be relinked to
4. Click **Next**
5. Click **Next**



6 **Social security bulletin.**

Online: getFullTxt
ISSN: 0037-7910

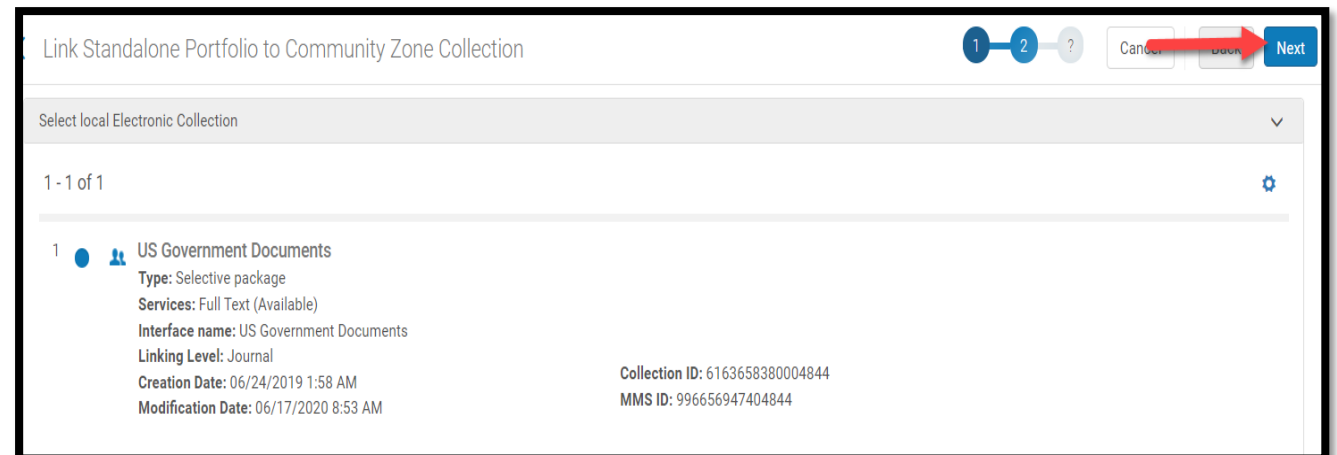
Electronic Material Type: Journal
Creation Date: 06/23/2019 8:46 AM
Modification Date: 06/23/2019 8:46 AM

Portfolio ID: 5363511150004844
MMS ID: 990002927300204844

Other details

Edit Portfolio Order ...

View
Link to community
Create E-Activation Task
Test access
Delete
Remove



Link Standalone Portfolio to Community Zone Collection

1 2 ? Cancel Next

Select local Electronic Collection

1 - 1 of 1

1 **US Government Documents**

Type: Selective package
Services: Full Text (Available)
Interface name: US Government Documents
Linking Level: Journal
Creation Date: 06/24/2019 1:58 AM
Modification Date: 06/17/2020 8:53 AM

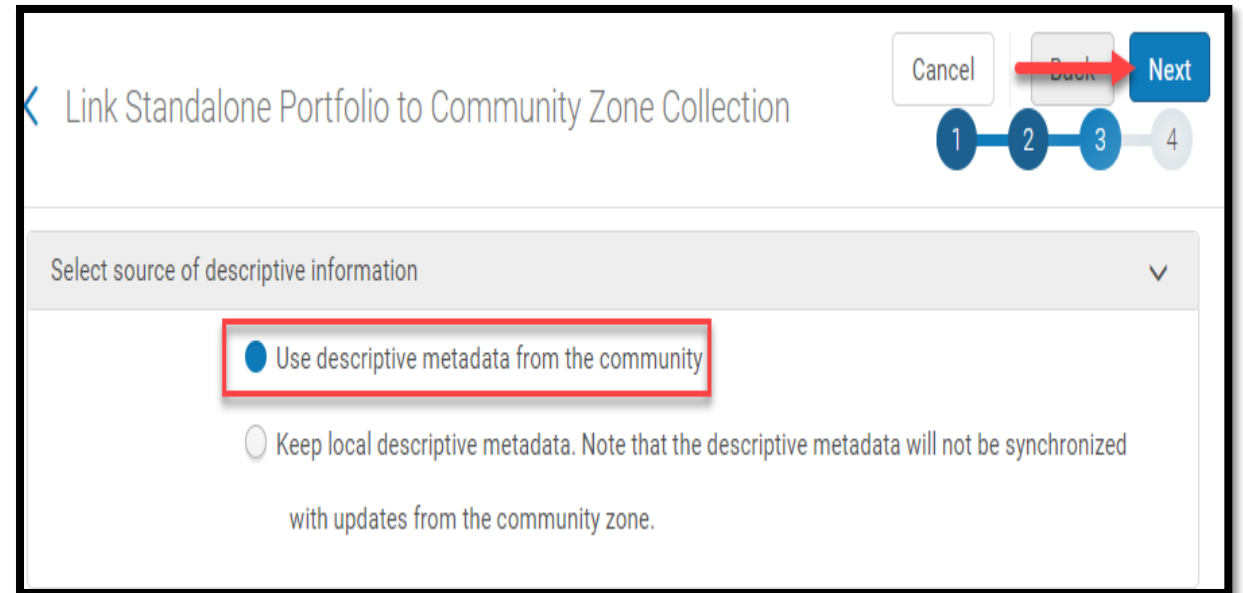
Collection ID: 6163658380004844
MMS ID: 996656947404844



Splitting Electronic Portfolios from Physical Bib Records

IZ electronic portfolio to be split that will be linked to the CZ:

6. Select source of descriptive information: [Select "Use descriptive metadata from the community"]
7. Click **Next**
8. Click **Link to the Community**
 - Click **Cancel** if an error message appears stating “The selected portfolio already belongs to the selected electronic collection”
 - Then, delete the portfolio to be split



Link Standalone Portfolio to Community Zone Collection

Cancel Back Next

1 2 3 4

Select source of descriptive information

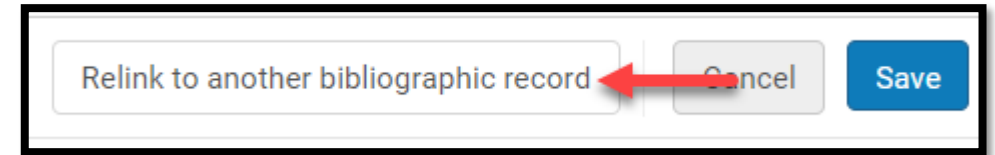
Use descriptive metadata from the community

Keep local descriptive metadata. Note that the descriptive metadata will not be synchronized with updates from the community zone.

Splitting Electronic Portfolios from Physical Bib Records

IZ electronic portfolio to be split that will not be linked to the CZ:

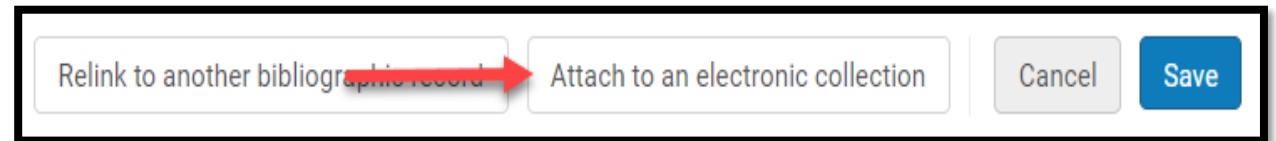
1. Export the correct format bib record to the IZ from OCLC if it does not already exist
2. Perform an "Electronic Portfolio" repository search for the electronic portfolio to be split
3. **Click Edit Portfolio**
4. Click **Relink to another bibliographic record**
 1. Click on the "Select from list" icon
 2. Search for the title in the IZ
 3. Click on the **Title**
 4. Handle bibliographic records without inventory: [Select "**Delete bibliographic record(s)**"]
 5. Click **Confirm**



Splitting Electronic Portfolios from Physical Bib Records


IZ electronic portfolio to be split that will not be linked to the CZ:

5. Click ***Attach to an electronic collection***
 1. Click the "**Select from list**" icon
 2. Search for the electronic collection the record should be linked to
 3. Click ***Confirm***
6. Click ***Cancel*** or ***Save***
 - Cancel - if no changes have been made to the electronic portfolio
 - Save - if changes have been made to the electronic portfolio



Relink to another bibliographic record → Attach to an electronic collection

Cancel Save



Attach to an electronic collection - Select a collection and service

Electronic Collection * Maggie's Test Import Profile Electronic Collection

Service * Full Text

Cancel Confirm

Splitting Electronic Portfolios from Physical Bib Records

CZ electronic portfolio to be split:

1. Perform an "**Electronic Portfolio**" repository search for the electronic portfolio to be split
2. Click ***Edit Portfolio***
3. Click ***Relink to another bibliographic record***

The screenshot displays a library system interface. At the top, a record is shown with the title "Economic indicators / prepared for the Joint Committee on the Economic Report by the Council of Economic Advisers." To the right of the title are three buttons: "Edit Portfolio", "Order", and a menu icon (three dots). A red arrow points to the "Edit Portfolio" button. Below the title, the record details are organized into three columns:

US Government Documents: getFullTxt	Access Type: Current	Portfolio ID: 5363725680004844
ISSN: 0013-0125	Electronic Material Type: Journal	Service ID: 6263658370004844
Available from 1995.	Creation Date: 06/24/2019 2:02 AM	Collection ID: 6163658380004844
	Modification Date: 11/18/2020 2:46 PM	MMS ID: 990001573630204844

Below the record details, a dialog box is open. It contains a text input field with the placeholder text "Relink to another bibliographic record". To the right of the input field are two buttons: "Cancel" and "Save". A red arrow points to the "Relink to another bibliographic record" text.

Splitting Electronic Portfolios from Physical Bib Records

CZ electronic portfolio to be split:

4. Choose title:
 1. Click the "**Select from list**" icon
 2. Search for the CZ bib record the electronic portfolio should be linked to
 3. Click on the **Title**
 4. Handling bibliographic records without inventory: [Select "**Delete bibliographic record(s)**"]
5. Click **Confirm**
6. Click **Cancel** or **Save**
 - Cancel - if no changes have been made to the electronic portfolio
 - Save - if changes have been made to the electronic portfolio

Relink Confirmation

You are about to relink the portfolio to title "Economic indicators / prepared for the Joint Committee on the Economic Report by the Council of Economic Advisers and printed for the use of the Joint Committee on the Economic Report."

Choose Title * Economic indicators / prepared for the Joint Committee on the Economic Report by the Co

Handling bibliographic records without inventory Delete bibliographic record(s)

Cancel Confirm

Deleting Electronic Portfolios

The background features a blue gradient. A large, light blue circle is centered on the right side of the image. A diagonal line, also in light blue, crosses the circle from the top right towards the bottom left.

Deleting Electronic Portfolios

- Electronic portfolios only need to be deleted if a CZ electronic portfolio already exists in the repository for the electronic portfolio and linking the portfolio to the CZ would create a duplicate portfolio
- Electronic portfolios can be deleted:
 - Manually
 - Using a job



Deleting Electronic Portfolios

To manually delete electronic portfolios:

1. Search for the electronic portfolio using an "**Electronic Portfolio**" repository search
2. Click **Delete** from the ellipses
3. Handling bibliographic records without inventory: [Select "**Delete bibliographic record(s)**"]
4. Click **Confirm**

The screenshot illustrates the deletion process in a library system. The top panel shows a portfolio titled "Mindful moves : kid-friendly yoga and peaceful activities for a happy, healthy you / Nicole Cardoza." with various metadata fields. A red box highlights the ellipsis menu icon in the top right corner. A dropdown menu is open, showing options like "View", "Create E-Activation Task", "Test access", "Delete", "Move", "Report To Ex Libris", "Resource sharing request", "Deactivate", and "Display in Discovery". A red arrow points to the "Delete" option. Below this, a "Delete confirmation" dialog box is shown. It contains an information icon and the text "You're about to delete the selected portfolio. Do you want to proceed?". A dropdown menu is open, showing "Delete bibliographic record(s)" selected, with a red box around it. At the bottom of the dialog, there are "Cancel" and "Confirm" buttons, with a red arrow pointing to the "Confirm" button.

Deleting Electronic Portfolios

Delete a set of portfolios using a job:

1. Go to **Admin>Manage Jobs and Set>Run a Job**
2. Select the “**Delete portfolios**” job
3. Click **Next**
4. Select the set
5. Click **Next**
6. Portfolio is linked to an active PO-line: [Select one]
 - Skip
 - Delete portfolio
7. Portfolio is linked to an active e-Activation task: [Select one]
 - Skip
 - Delete portfolio
8. Handling bibliographic records without inventory: [Select "Delete bibliographic record(s)"]
9. Click **Submit**
10. Click **Confirm**



Deleting Electronic Portfolios

Run a Job - Enter Task Parameters

Task Parameters: Delete portfolios

DELETE POLICY

Portfolio is linked to an active PO-line *

Portfolio is linked to an active e-Activation task *

Handling bibliographic records without inventory *

Skip will prevent portfolios with an active POL from being deleted. May want to choose this so POLs can be closed or canceled prior to being

1 2 3 4 Cancel Back Next

Run a Job - Enter Task Parameters

Task Parameters: Delete portfolios

DELETE POLICY

Portfolio is linked to an active PO-line *

Portfolio is linked to an active e-Activation task *

Handling bibliographic records without inventory *

1 2 3 4 Cancel Back Next



Troubleshooting



Troubleshooting

Possible scenarios that may be encountered while splitting electronic inventory from physical bib records:

1. No matching CZ electronic portfolio in the collection
2. The institution does not want to use the descriptive metadata of the community zone record
3. The electronic portfolio already belongs to the selected electronic collection



Troubleshooting

No matching portfolio in the CZ collection:

1. Export the electronic format bib record to the institution's IZ from OCLC Connexion
2. Search for the electronic portfolio in the repository using: **Electronic portfolio: [Title, Portfolio pid, etc.]: [enter search terms]**
3. Click ***Edit Portfolio***
4. Click ***Relink to another bibliographic record***
5. Choose Title:
 1. Click on the "Select from list" icon
 2. Search for the bib record from step 1 in the IZ
 3. Click on the **title**
6. Handling bibliographic records without inventory: [Select "**Delete bibliographic record(s)**"]
7. Click ***Confirm***
8. Click ***Attach to Another Collection***
9. Click the "**Select from list**" icon
10. Search for the collection the electronic portfolio will be attached to
11. Click on the collection name
12. Click ***Confirm***



Troubleshooting

The institution does not want to use the descriptive metadata of the community zone record :

1. Export the correct electronic format bib record from OCLC Connexion to the IZ
2. Search for the electronic portfolio using an "Electronic Portfolios" repository search
3. Click **Edit Portfolio**
4. Click **Relink to another bibliographic record**
5. Choose Title:
 1. Click on the "Select from list" icon
 2. Search for the bib record from step 1 in the IZ
 3. Click on the **title**
6. Handling bibliographic records without inventory: [Select "**Delete bibliographic record(s)**"]
7. Click **Confirm**
8. Click **Link to Community** from the ellipses
9. Choose title:
 8. Click the "Select from list" icon
 9. Search for the CZ bib record the electronic portfolio should be linked to
 10. Click on the record
 11. Handling bibliographic records without inventory: [Select "Delete bibliographic record(s)"]
10. Click **Confirm**
11. Click **Cancel** or **Save**



Troubleshooting

The electronic portfolio already belongs to the selected electronic collection:

1. Click **Cancel** when the error message appears stating “The selected portfolio already belongs to the selected electronic collection”
2. Delete the electronic portfolio instead of using the "Link to Community" workflow because it already exists
 1. Click **Delete** from the ellipses of the portfolio
 2. Handling bibliographic records without inventory: [Select "**Delete bibliographic record(s)**"]
 3. Click **Confirm**



Supporting Documentation



Supporting Documentation

SUNY:

- SLS Libguide: [Splitting Inventory](#)

