Best Practice for E-Resources Vendor Loads into Aleph
Approved by LSP Task Force: 7/13/2018

Data extracts from Aleph are being scheduled for September 2018 to create a SUNY-wide Alma/Primo test environment. Campuses will be notified when the schedule is finalized in the first two weeks of August, 2018. In preparation for those extracts, the OLIS will stop e-resources vendor data loads for those campuses that are managed by the OLIS by August 31, 2018. All campuses are recommended to also stop e-resources vendor loads when it works with their schedules.

For the remainder of Aleph’s brief life span, the SLC strongly recommends that campuses:

- Remove from Aleph, or request OLIS to delete for them, all MARC records for e-resources that can be activated via a discovery service or link resolver (this does not include e-resources that are purchased by campuses or that cannot be activated)
- Ensure that these e-resources are activated in the campus discovery system and/or link resolver
- Not resume e-resources vendor loads after the Aleph data extracts have been completed EXCEPT for those e-resources that are purchased by the campus or cannot be activated in the campus’s knowledgebase/link resolver

Rationale for these recommendations:
Integrated library systems were developed to manage print resources, but over time, third party products were developed to manage electronic resources through a combination of link resolvers, knowledgebases, A-Z lists, discovery layers and ERMS (electronic resource management systems). In response, the Alma/Primo architecture replaced these discrete components to seamlessly incorporate management of electronic resources. As a result, the Primo interface pulls metadata from Alma that represents the traditional print based resources while allowing for electronic content to be managed through the Primo Central Index and the Alma Community Zone. This eliminates the need to load and maintain vendor records for electronic subscription packages in Alma.

As part of the data migration, MARC records representing e-resources in Aleph need to be identified and addressed in a P2E (physical to electronic) procedure to ensure they are treated as e-resources in Alma. Otherwise, they will appear as physical items, which cannot be converted to e-resources. Experience from the Vanguard loads has shown that the results are mixed with some e-resource content being displayed as physical while other e-resources are duplicated between Alma and Primo. This can result in confusing displays and necessary cleanup activities in Alma. Continuation of vendor e-resources data loads into Aleph will also complicate how data for these materials are extracted and migrated for the go-live extracts in May/June 2019.

Further, it is possible that the time spent on handling vendor loads in Aleph can be replaced by learning how e-resources are managed in Alma/Primo and developing strategies for instructing
patrons on how to use a discovery tool as the concept of a separate “WebOPAC” goes away in
the Alma/Primo environment, with OPAC functionality.