**Maintenance for Alma & Primo**

**Alma Maintenance**

Weekly:

CZ (Community Zone):Weekly: Check for new portfolios (individual journals) and electronic collection (journal and eBook) database updates. Update CZ, in Alma as needed. This is based on whether or not we have electronic portfolios or electronic collections that need updating (add or delete).

Monthly:

Alma has new releases that come out monthly. New and/or improved features are added. It is my responsibility to keep up with these changes and train/work with staff, if it is something there is something new that is part of their workflow.

Quarterly:

Compare EBSCO eBook databases new title lists with the title list we currently have in Alma. Find titles that have been deleted by EBSCO, and make changes in Alma.

Run Jobs in Alma for the following:

1. Expired patrons
2. Patron purge dates
3. Expired Reserve lists

As needed:

When we subscribe to new electronic databases or choose not to subscribe to new databases, there is work that needs to be done in Alma and PCI (These tasks are done by the sys admin).

1. The database either needs to be activated, if it is found in the community zone, or de-activated if it is no longer available.

2. Information needs to be added to the configuration of the electronic database in Alma.

3. If the new electronic database is not found in the CZ, then work needs to be done in the PCI, to activate alternative coverage, if it is available for that particular database. All electronic databases require activation or deactivation in PCI.

**Primo Maintenance:**

Weekly:

New electronic databases that are available in the CZ need to be activated in the PCI. There are a lot of Open Access Resources available. Primo recently added 2 open textbook OER databases that I activated.

Monthly:

Primo Central Index (PCI) new releases are sent out monthly. A list of new databases and updates to Primo are sent out. For example there may be a database that has a title change, or a title or database may no longer be available. If changes need to be made to work needs to be done in the institution’s PCI. This is a task that is performed by the sys admin.

Quarterly:

BTC Library’s OneSearch/Primo page needs to be updated quarterly.

As needed:

PCI updates (See “as needed” above for Alma).