



Kanopy & Chill?

Using Alma to manage
licensed media



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The background is a dark blue stage with orange curtains on the left and right sides. A spotlight beam of yellow light shines from the bottom center, illuminating the text.

Episode 1: Background

There's no crying in cataloging

15 IZs &
1 NZ to rule them
all

Consortial Alma



Primo
VE

Alma Modules

Electronic
Resources

Setup Import
Profile

Design
Analytics

Excel

OCLC

MarcEdit

SalesForce

Supporting Software

**Administrative /
Technical**

*POs not
covered

Existing problems



License variation

What we have here is a failure to communicate license dates.



Non-standard portfolio info



Low discoverability

Mo' bad metadata mo' problems



Lifecycle management

What happens in Alma, stays in Alma



Notification

Check Alma

Get records

Enhance records

Import

Deactivate



Workflow overview



The background is a dark blue stage with orange curtains on the left and right. Several yellow spotlights shine from the bottom, creating a fan-like pattern of light beams that illuminate the text.

Episode 2: Bib records

**Oh bib record,
where art thou?**



Nominees for best bib record...



	OCLC Record	Vendor Record	CZ Record
Control #s	3	1	0
Includes OCLC#?	Yes	No	No
Name headings (600 & 610)	3	0	0
Topical subject (650)	4	3	0
Genre/Form heading (655)	2	1	0

=LDR 02310ngm a2200493 i 4500
 =001 kan11947169
 =003 CaSfKAN
 =005 20210126021749.0
 =006 m\l\l\l\l\l\l\l\l\l\l
 =007 cr\una---unuuu
 =007 vz\uzazuu
 =008 210126p20211976cau104\l\l\l\l\l\l\l\l\l\l
 =028 52\$a11947169\$bKanopy
 =040 \\\\$aCaSfKAN\$beng\$erda\$cCaSfKAN
 =245 00\$aHarlan County USA.
 =264 11\$bThe Criterion Collection,\$c1976.
 =264 11\$a[San Francisco, California, USA] :\$bKanopy Streaming,\$c2021.
 =300 \\\\$a1 online resource (streaming video file) (105 minutes):\$bdigital, .flv file, sound
 =336 \\\\$a\$two-dimensional moving image\$btdi\$2rdacontent
 =337 \\\\$acomputer\$bcb\$2rdamedia
 =338 \\\\$aonline resource\$bcr\$2rdacarrier
 =344 \\\\$adigital
 =347 \\\\$a\$video file\$bMPEG-4\$bFlash
 =500 \\\\$aTitle from title frames.
 =500 \\\\$aFilm
 =500 \\\\$aln Process Record.
 =511 01\$aHouston Elmore, John Corcoran, John O'Leary, Norman Yarborough
 =518 \\\\$aOriginally produced by The Criterion Collection in 1976.
 =520 \\\\$aBarbara Kopple's Academy Award-winning HARLAN COUNTY USA unflinchingly docu
 =538 \\\\$aMode of access: World Wide Web.
 =546 \\\\$aln English
 =650 10\$aAmericans.
 =650 10\$aSociology.
 =650 10\$aDocumentary films.
 =655 17\$aDocumentary films.\$2lcgft
 =700 11\$aKopple, Barbara,\$efilm director.
 =700 11\$aElmore, Houston,\$eactor.
 =700 11\$aCorcoran, John,\$eactor.
 =700 11\$aO'Leary, John,\$eactor.
 =700 11\$aYarborough, Norman,\$eactor.
 =710 21\$aThe Criterion Collection (Firm)\$4dst
 =710 21\$aKanopy (Firm)\$4dst
 =856 40\$uhttps://gwu.kanopy.com/10947170/\$a Kanopy streaming video
 =856 42\$zCover Image\$uhttps://www.kanopy.com/node/10947170/external-image

Kanopy

=028 52\$a11947169\$bKanopy
 =029 01\$aAU@\$b000068571504
 =035 \\\\$a(OCOLC)1236031198
 =049 \\\\$aDGWW
 =245 00\$aHarlan County U.S.A.
 =264 11\$bThe Criterion Collection,\$c1976.
 =264 11\$a[San Francisco, California, USA] :\$bKanopy Streaming,\$c2021.
 =300 \\\\$a1 online resource (streaming video file) (105 minutes) :\$b.flv file, sound, color
 =336 \\\\$a\$two-dimensional moving image\$btdi\$2rdacontent
 =337 \\\\$acomputer\$bcb\$2rdamedia
 =338 \\\\$aonline resource\$bcr\$2rdacarrier
 =344 \\\\$adigital
 =347 \\\\$a\$video file\$bMPEG-4\$bFlash
 =500 \\\\$aTitle from title frames.
 =511 01\$aHouston Elmore, John Corcoran, John O'Leary, Norman Yarborough.
 =508 \\\\$aProducer and director, Barbara Kopple; cinematographers, Hart Perry, Kevin Keating; principal editor,
 =518 \\\\$aOriginally produced by Cabin Creek Films in 1976.
 =520 \\\\$aBarbara Kopple's Academy Award-winning HARLAN COUNTY USA unflinchingly documents a gruelin
 =546 \\\\$aln English with optional closed captioning.
 =650 10\$aDocumentary films.
 =650 10\$aCoal Miners' Strike, Harlan County, Ky., 1973.
 =650 10\$aCoal miners\$zKentucky\$zHarlan County.
 =650 10\$aStrikes and lockouts\$zKentucky\$zHarlan County.
 =651 10\$aHarlan County (Ky.)
 =610 20\$aEastover Mining Company.
 =610 20\$aDuke Power Company.
 =610 20\$aUnited Mine Workers of America.
 =650 17\$aAmericans.\$2fast\$0(OCOLC)f\$00807488
 =650 17\$aDocumentary films.\$2fast\$0(OCOLC)f\$00896079
 =650 17\$aSociology.\$2fast\$0(OCOLC)f\$01123875
 =655 17\$aDocumentary films.\$2fast\$0(OCOLC)f\$0171390
 =655 17\$aFeature films.\$2lcgft
 =655 17\$aDocumentary films.\$2lcgft
 =700 11\$aKopple, Barbara,\$efilm director.
 =700 11\$aElmore, Houston,\$eon-screen participant.
 =700 11\$aCorcoran, John,\$eon-screen participant.
 =700 11\$aO'Leary, John,\$eon-screen participant.
 =700 11\$aYarborough, Norman,\$eon-screen participant.
 =700 11\$aPerry, Hart,\$ecinematographer.
 =700 11\$aKeating, Kevin,\$d1944-\$ecinematographer.
 =700 11\$aBaker, Nancy,\$e1946-\$efilm editor.
 =710 21\$aThe Criterion Collection (Firm)\$4dst
 =710 21\$aKanopy (Firm)\$4dst
 =856 40\$uhttps://secure.qut.edu.au/library/resources/current/databases/cou/kanopy/index-script/?10947170\$z

OCLC

The background features a dark blue stage with orange curtains on the left and right sides. Several yellow spotlights are shining upwards from the bottom, creating a fan-like pattern of light on the dark background.

Episode 3: Import profiles

**I'll get you my pretty, and your
little bib record too.**



Inventory

Can create portfolios
upon import



Discovery Collections

787 \$w [Collection_ID]
will add to existing
collections



E Collection

Is automatically added to
desired collection



URL

Automatically added



Cover art

957 \$9 Local, Primo norm
rule for thumbnail



Coverage dates

Doesn't automatically
add coverage dates

Inventory information

Normalization & Validation

Filter	
Filter out the data using	
Normalization	
Correct the data using	Add BIB to Collection
Validation Exception Profile	
Handle invalid data using	MarcXML Bib Metadata Editing On Save

Inventory Operations			
Electronic			
E-Book Mapping			
Delete/deactivate portfolios	No		
Use Community Zone portfolios	No		
Portfolio type	Part of an electronic collection		
Electronic Collection	Kanopy		
Service	Full Text		
Material type	Streaming Video		
	Multiple portfolios		
Create inventory only for new bibliographic records	Yes		
Extract portfolio information from field	856		
	Field	Subfield	Default Value
Extract access URL from field	856	u	-
Extract internal description note from field	856	-	-
Extract authentication note from field	856	-	-
Extract public note from field	856	-	-
Extract library from field	856	-	Gelman Library (by appointment only)
License	Kanopy LLC		
Activate resource	Yes		

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Episode 4: Portfolios & the loader

**Alright, Mr. DeVille, I'm ready
for my batch update**

5 70 Acres in Chicago: Cabrini Green.

Kanopy (Kanopy PDA - USA): getFullTxt
Available from 05/25/2020 until 05/25/2021.

Access Type: Current

Electronic Material Type: Streaming Video

Creation Date: 05/14/2020 10:47:07 EDT

 **Orders:** 1

Portfolio ID:
53624715540004107

Service ID:
62588239390004107

Collection ID:
61571857710004107

MMS ID:
99186105107804107

Coverage dates

View Online

Full text availability

Kanopy
Available from 05/25/2020 through 05/25/2021.

Found a Problem?

6 History of American Criminal Justice / by Banning K. Lary.

Films On Demand: getFullTxt

Access Type: current

Electronic Material Type: Streaming Video

Creation Date: 04/24/2019 12:19:01 EDT

Modification Date: 11/23/2020 11:16:57
EST

 **Orders:** 1



Portfolio ID:
53607817100004107

Service ID:
62621968660004107

Collection ID:
61621968670004107

MMS ID:
99186010314704107

Notes field

View Online

Full text availability

Films On Demand
 This video is available through April 24, 2022.

Found a Problem?



VIP Fields



Danger, Will Robinson



ISSN/ISBN & OCLC
match points

Can sometimes cause issues and false
matches with physical records



There can be only one

Cannot add same field multiple times



Analytics to Portfolio
Loader

Terminology is different



Vote to add multiple coverage date functionality in the loader: <https://bit.ly/2SGj63t>

	A	B	C	D	E	F	G	H
1	PORTFOLIO_PID	AVAILABILITY	FROM_YEAR	FROM_MONTH	FROM_DAY	TO_YEAR	TO_MONTH	TO_DAY
2	53634099960004107	ACTIVE	2021	01	08	2022	01	08
3	53610279180004107	INACTIVE	2020	04	14	2022	04	14
4	53610252090004107	ACTIVE	2020	03	02	2024	03	02
5	53610257010004107	ACTIVE	2020	03	10	2022	03	11
6	53610257430004107	ACTIVE	2020	02	25	2022	02	25
7	53610348630004107	INACTIVE	2020	07	16	2021	07	16
8	53612869540004107	ACTIVE	2020	09	11	2022	03	12
9	53612869690004107	INACTIVE	2020	09	01	2021	09	18
10	53612869730004107	ACTIVE	2019	09	11	2022	01	06
11	53612869800004107	ACTIVE	2019	09	11	2022	01	29
12	53613683370004107	INACTIVE	2019	10	28	2023	10	28
13	53613685990004107	INACTIVE	2019	10	16	2021	10	16
14	53614149480004107	INACTIVE	2021	06	01	2022	06	01
15								

Portfolio loader



Eliminates clicking

Updates information in
one spreadsheet



Streamline work

Start of term = busy
license season



Standardization

For your viewing
pleasure



Analytics reports

Easily turned into a
portfolio loader template



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Episode 5: Discovery

**Live long and
discover**


Alma
Production


Acquisitions


Resources


Discovery


Fulfillment


Admin


Analytics

Cataloging

- ★ Open Metadata Editor
- Search Resources
- Browse Bibliographic Headings

- ★ Browse Shelf Listing
- Authority Control Task List
- Reminders

Create Inventory

- Add Local Electronic Collection
- Add Local Portfolio
- Add Physical Item

Manage Inventory

- ★ Manage Collections
- Community Zone Updates Task List
- Manage Electronic Resource Activation
- Network Harvesting Report List
- My Electronic Resources by Provider
- Shelf Report

Electronic collections

Discovery collection



[Manage collections \(Knowledge Base\)](#)

🏠 COLLECTIONS /

Streaming Video Collection

Sort items by Date-newest ▼

Search 🔍

Primo Display

Items (232)



VIDEO
Olympia : der Film von den Olympischen
Spielen, Berlin 1936



VIDEO
Downfall.



VIDEO
Transit.



VIDEO
The last black man in San Francisco



VIDEO
Learning to Skateboard in a Warzone (If
You're a Girl).



VIDEO
Biutiful



VIDEO
Learning the Aleph Bet.



VIDEO
Blackfish.



<https://go.gwu.edu/streamingmedia>

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Episode 6: Deactivation

So long, partner



Custom deactivate task



Email reminders



One task per portfolio



Done vs. delete



No batch work



E-Activation

Analytics report

Spreadsheet

Portfolio loader

Logical set

Suppress



A la carté deactivation



Excel report

File

Home

Insert

Page Layout

Formulas

Data

Review

View

Help

Acrobat

Tell me what you want to do

Get Data

From Text/CSV

From Web

From Table/Range

Recent Sources

Existing Connections

Refresh All

Queries & Connections

Properties

Edit Links

Sort

Filter

Advanced

Text to Columns

Flash Fill

Remove Duplicates

Data Validation

Consolidate

Relationships

Manage Data Model

What-If Analysis

Forecast Sheet

Group

Ungroup

Subtotal

Outline

Get & Transform Data

Queries & Connections

Sort & Filter

Data Tools

Forecast

H1

Coverage Information Combined

	A	B	C	D	E	F	G	H	I	J
1	MMS Id	Portfolio Id	Title	OCLC Control Number	Bibliographic Lifecycle	Availability	Coverage Statement	Coverage Information Combined	Lifecycle	Suppressed From Discovery
2	99185930148104107	53634099960004107	L'avventura.	956898078; 973343061	In Repository	Available	Only local	Available from 2021-01-08 until 2022-01-08;	In Repository	No
3	99186025635704107	53610279180004107	The seventh seal /	897772389; 973342890;	In Repository	Available	Only local	Available from 2020-04-14 until 2022-04-14;	In Repository	No
4	99186025664704107	53610252090004107	Aguirre, the wrath of	1003863091; 100660781	In Repository	Available	Only local	Available from 2020-03-02 until 2024-03-02;	In Repository	No
5	99186025669704107	53610253590004107	American tongues /	900275517; 973350303;	In Repository	Available	Only local	Available from 2020-06-08 until 2021-06-08;	In Repository	No
6	99186025681104107	53610257010004107	Race-- the power of an	956893425	In Repository	Available	Only local	Available from 2020-03-10 until 2022-03-11;	In Repository	No
7	99186025682504107	53610257430004107	I am not your negro.	1014288389	In Repository	Available	Only local	Available from 2020-02-25 until 2022-02-25;	In Repository	No
8	99186026622704107	53610348630004107	La haine.	953383763	In Repository	Available	Only local	Available from 2020-07-16 until 2021-07-16;	In Repository	No
9	99186041922804107	53612869540004107	Rashomon.	900275586; 973355427;	In Repository	Available	Only local	Available from 2020-09-11 until 2022-03-12;	In Repository	No
10	99186041923004107	53612869690004107	The Liberator.		In Repository	Available	Only local	Available from 2020-09-01 until 2021-09-18;	In Repository	No
11	99186041923104107	53612869730004107	The lost honor of Kath	972891543	In Repository	Available	Only local	Available from 2019-09-11 until 2022-01-06;	In Repository	No
12	99186041923304107	53612869800004107	The Murderers are Am	900276299	In Repository	Available	Only local	Available from 2019-09-11 until 2022-01-29;	In Repository	No
13	99186046906604107	53613683370004107	Scaffolding.		In Repository	Available	Only local	Available from 2019-10-28 until 2023-10-28;	In Repository	No



If you use "Text to columns" you can break up coverage information combined into single data columns.

Post text to columns

	F	G	H	I	J	K	L	
le	Availability	Coverage Statement	Combined					
	Available	Only local	2021	01	08	2022	01	08
	Available	Only local	2020	04	14	2022	04	14
	Available	Only local	2020	03	02	2024	03	02
	Available	Only local	2020	06	08	2021	06	08
	Available	Only local	2020	03	10	2022	03	11
	Available	Only local	2020	02	25	2022	02	25
	Available	Only local	2020	07	16	2021	07	16
	Available	Only local	2020	09	11	2022	03	12
	Available	Only local	2020	09	01	2021	09	18
	Available	Only local	2019	09	11	2022	01	06
	Available	Only local	2019	09	11	2022	01	29
	Available	Only local	2019	10	28	2023	10	28
	Available	Only local	2019	10	16	2021	10	16
	Available	Only local	2021	06	01	2022	06	01
	Available	Only local	2021	01	13	2022	01	13
	Available	Only local	2020	11	11	2021	11	11
	Available	Only local	2020	11	30	2021	11	30
	Available	Only local	2021	03	29	2022	03	29
	Available	Only local	2020	11	30	2023	11	30

Electronic Titles (1 - 5 of 5)

Set name 00 - Suppress Kanopy (DO NOT DELETE) **Set type** logical
where (Electronic Collection Name contains keywords "kanopy" AND Availability (Electronic Portfolio) equals "Not Available"
AND Tag Suppressed (Title) equals "No")

Save Query

B Back

Push Selected to MDE

1  Institution

2  Network

3  Community



Select All

Sort by: Rank ▾

Secondary Sort by: Rank ▾

0 rows selected

Expand: All ▾ ×



1 ☐



When I Saw You.

Edit Record

Order



Visual material By Jacir, Annemarie, ([San Francisco, California, USA] : Kino Lorber, 2019)

Subject: Foreign films. Drama. Motion pictures. and others

Creation Date: 09/22/2020 10:39:23 EDT

Modification Date: 06/17/2021 22:12:07 EDT

Language: Arabic

Record number:
(CaSfKAN)kan6320851 

 **Orders:** 1

MMS ID:
99186126110504107



● Electronic (1)

Interface Name	Collection Name	Service Type	Availability	Portfolio
Kanopy	Kanopy (Kanopy PDA - USA)	Full Text	● Inactive	View

Portfolio List

Collections (1)

1 Collection

Collection Name
Streaming Video Collection

Other details



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Denouement

A new hope

Award for revised workflow...

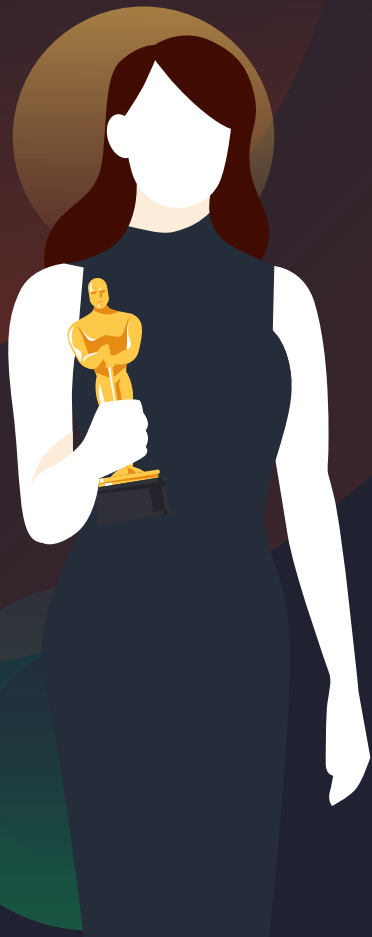
Workflow

- Streamlined
- Clear life cycle
- Better Alma knowledge



Discoverability

- Enhanced metadata
- Streaming collection
- Clear license dates
- Maximized ROI



Questions?

It has been my privilege.
Thank you.

Presenter

Presentation template

Icons

Images

License

Fonts

Jen Froetschel

Slidesgo

Flaticon

Freepik

Creative Commons BY-SA-NC

Work Sans

Karla

Additional Resources



- Discovery Collection: <https://go.gwu.edu/streamingmedia>
- American University's discovery collection: <https://bit.ly/2S1gCMO>
- MarcEdit task list: <https://go.gwu.edu/kanopytask>
- Import profile: Community profile name "Kanopy import (GW)"
- Analytics analysis path: shared/Community/Reports/Institutions/George Washington University
- Excel's data to columns: <https://bit.ly/3oRxT7j>
- MarcEdit: <https://marcedit.reeset.net/>
- Knowledge Base Portfolio Loader information: <https://bit.ly/2S2glcv>
- NERS Coverage date enhancement: <https://bit.ly/2SGj63t>

