

The Community Zone Updates Task List

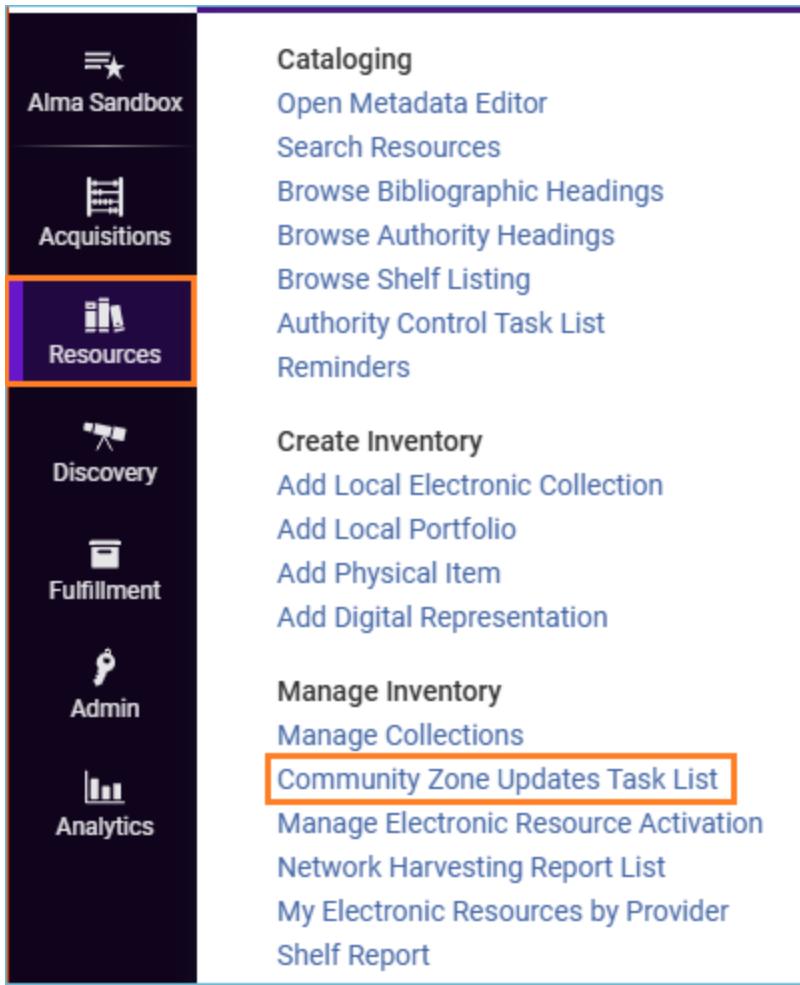
Role: To work with the Community Zone Updates Task List, you will need the **Repository Manager** or **Purchasing Operator/Purchasing Manager** role.

The Community Zone Updates Task List is an important tool for the management of your electronic resources. When the electronic resources in your Institution Zone are updated by the Community Zone via the Synchronize changes from the CZ job, those updates are listed in the Task List.

- The changes in the Task List are specific to your institution.
- The Community Zone changes do not affect locally managed portfolios.
- Updates are synchronized on Sundays at midnight in your time zone.

How to View the Task List

Click on the **Resources Menu**, and under the **Manage Inventory** heading, select **Community Zone Updates Task List**.

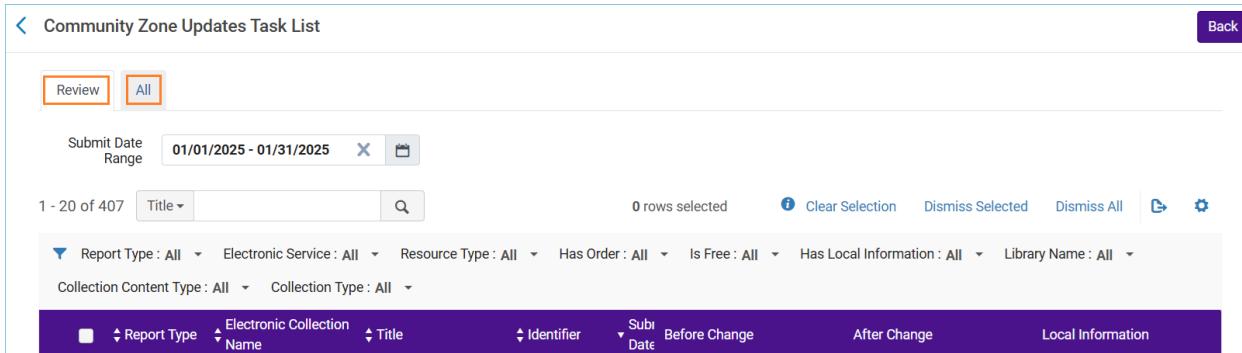


The screenshot shows the Alma Sandbox interface. On the left is a vertical sidebar with icons and labels: Alma Sandbox (star icon), Acquisitions (grid icon), Resources (book icon, highlighted with an orange box), Discovery (magnifying glass icon), Fulfillment (box icon), Admin (key icon), and Analytics (bar chart icon). The main content area is titled 'Cataloging' and lists several options: Open Metadata Editor, Search Resources, Browse Bibliographic Headings, Browse Authority Headings, Browse Shelf Listing, Authority Control Task List, and Reminders. Below this is a section titled 'Create Inventory' with options: Add Local Electronic Collection, Add Local Portfolio, Add Physical Item, and Add Digital Representation. Further down is a section titled 'Manage Inventory' with options: Manage Collections, Community Zone Updates Task List (which is also highlighted with an orange box), Manage Electronic Resource Activation, Network Harvesting Report List, My Electronic Resources by Provider, and Shelf Report.

The Task List may appear empty at first. Just clear the **Submit Date Range** box, and the list will populate with new entries.

At the top of the page are two tabs- **Review** and **All**.

- The **Review** tab lists all the changes to your electronic resources that are available for review.
- The **All** tab is a history of all changes to your electronic resources.

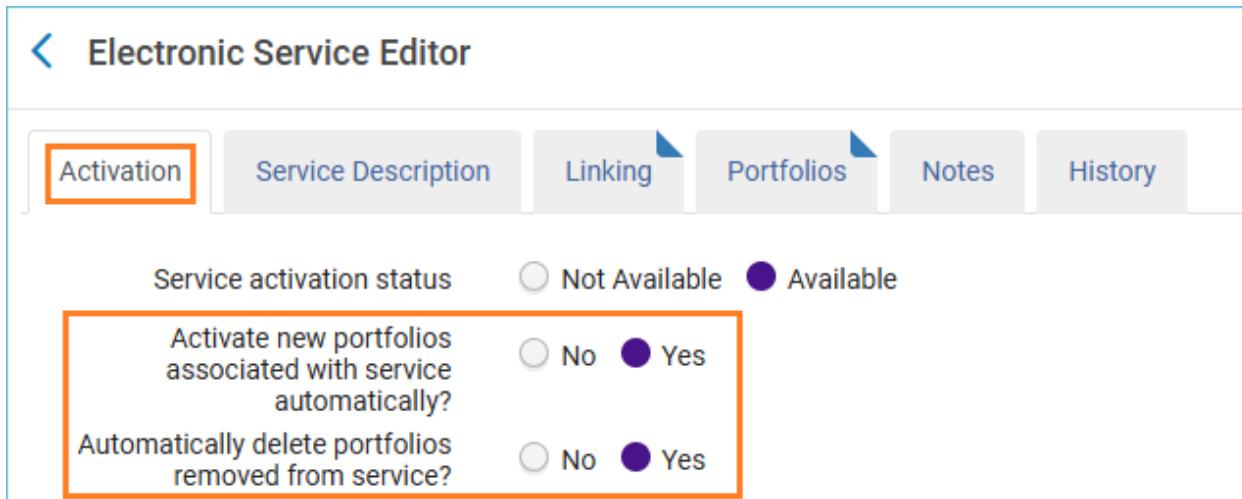


The screenshot shows the 'Community Zone Updates Task List' page. At the top, there are two tabs: 'Review' (which is selected and highlighted with an orange box) and 'All'. Below the tabs is a 'Submit Date Range' input field showing '01/01/2025 - 01/31/2025' with a clear button ('X') and a save button ('Save'). The main area shows a table header with columns: Report Type, Electronic Service, Resource Type, Has Order, Is Free, Has Local Information, Library Name, Collection Content Type, and Collection Type. The table body shows 1 - 20 of 407 rows, with a 'Title' dropdown and a search icon. At the bottom, there are buttons for 'Clear Selection', 'Dismiss Selected', 'Dismiss All', and a gear icon. The footer contains navigation icons for back, forward, and search.

There are several filters for the Task List; the most useful is **Report Type**. [This support document](#) describes all the reports available in this filter.

Auto-Activation and Non Auto-Activation

Generally, when you activate an electronic resource from the Community Zone, you will select **Automatically activate new portfolios** and **Automatically delete portfolios** when the electronic collection type is **Aggregator**.



Electronic Service Editor

Activation Service Description Linking Portfolios Notes History

Service activation status Not Available Available

Activate new portfolios associated with service automatically? No Yes

Automatically delete portfolios removed from service? No Yes

Electronic collections with these selections are automatically updated by the Community Zone. Electronic collections that are **Selective** should not have this setting, because your institution only subscribes to some titles within them.

Important note: When a portfolio is deleted from a **non auto-active electronic service**, it is not deleted. It is unlinked from the Community Zone, and the availability is changed to **Not Available**.

Actions you can take from the Task List

- From the row action menu, you can edit the electronic portfolio, the electronic service, or the electronic collection.

	Report Type	Electronic Collection Name	Title	Identifier	Submit Date	Before Change	After Change	Local Information
1	<input type="checkbox"/> Electronic Collection 'CDI search rights' field updated	RAMBI: The Index of Articles on Jewish Studies			01/30/2025 11:56:22 PM, CST	Subscription	Free	Dismiss Edit portfolio Edit electronic service Edit electronic collection
2	<input type="checkbox"/> Portfolio deleted from auto-delete electronic service	Gale Literature Resource Center	English literature in transition, 1880-1920.	0013-8339	01/23/2025 06:50:13 PM, CST	-	-	Test access Report To Ex Libris View hidden More actions
3	<input type="checkbox"/> Portfolio bibliographic record updated	Newsbank Access World News	Haaretz (Israel)		01/18/2025 03:18:28 AM, CST	99100000000366373	99528000000011923	
4	<input type="checkbox"/> Portfolio coverage update	Gale Literature Resource Center	Canadian Children's Book news / the Canadian Children's Book Centre.	1705-7809	01/15/2025 11:55:59 PM, CST	Available from 01/01/2006.	Available from 01/01/2006 until 03/31/2023.	...

- You can dismiss entries on the list. This will remove the entry from the list, but it will remain under the **All** tab. Once you dismiss an entry, it cannot be moved back to the **Review** tab.
- You can dismiss entries using the row action menu, or the check box, and click **Dismiss Selected**. You can dismiss multiple entries this way.
- If you see an error with a portfolio that should be reported to Ex Libris, please submit a ticket to ODIN, and we will report it to Ex Libris.

Community Zone Task List Report Types

Use the drop-down list of reports to filter the CZ updates by **Report Type**.

Report Type:

Collection Content

	Report Type	Report
1	<input type="checkbox"/> Electronic Collection 'CDI full text linking' field updated	
1	<input type="checkbox"/> Electronic Collection 'CDI full text rights' field updated	
1	<input type="checkbox"/> Electronic Collection 'CDI search activation' field updated	
1	<input type="checkbox"/> Electronic Collection 'CDI search rights' field updated	
1	<input type="checkbox"/> Electronic Collection 'CDI type' field updated	
2	<input type="checkbox"/> Portfolio from auto-delete electronic service	Electronic Collection 'Management Level in Community Zone' field updated
2	<input type="checkbox"/> Portfolio from auto-delete electronic service	Electronic collection bibliographic record update
3	<input type="checkbox"/> Portfolio deleted from auto-delete electronic service	Electronic collection deleted
3	<input type="checkbox"/> Portfolio deleted from auto-delete electronic service	Electronic collection linking parameters update
3	<input type="checkbox"/> Portfolio deleted from auto-delete electronic service	Electronic service base url updated

To streamline your work, check only these four reports:

Portfolio deleted from non auto-active electronic service – The portfolio is deleted from the electronic collection in the CZ, but it cannot be deleted automatically from Alma. The portfolio is unlinked from the CZ and saved as a local portfolio, and it is changed to Not Available. You may need to check that you still have access and activate the portfolio from another collection.

Electronic service base URL updated - Important to check this because if the base URL has changed it can affect access. You may need to update EZ Proxy settings.

Portfolio coverage update – Review this report with the filter, **Has Local Information: Yes**. If you have local coverage for a portfolio, do you want to switch to the new coverage or keep the local coverage?

Electronic Collection deleted - The electronic collection is unlinked from the Community Zone and turned inactive. The institution icon (single building) appears beside the electronic collection in the repository search. If you decide to keep the electronic collection, select Actions > Edit and manually manage the electronic collection. If you decide to delete the electronic collection, find it using the repository search and manually delete it. There may be a replacement electronic collection to activate in the Community Zone.

Once you have checked these four reports, you can dismiss the rest of the tasks to keep the task list up to date.