Autoholdings for ProQuest Ebooks into Alma for CARLI

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August 2022

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Training & Consulting Partners (TCP)

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Session Objectives

By the end of the session, you will be able to

- Recall the benefits of autoholdings

- List some of the considerations of autoholdings

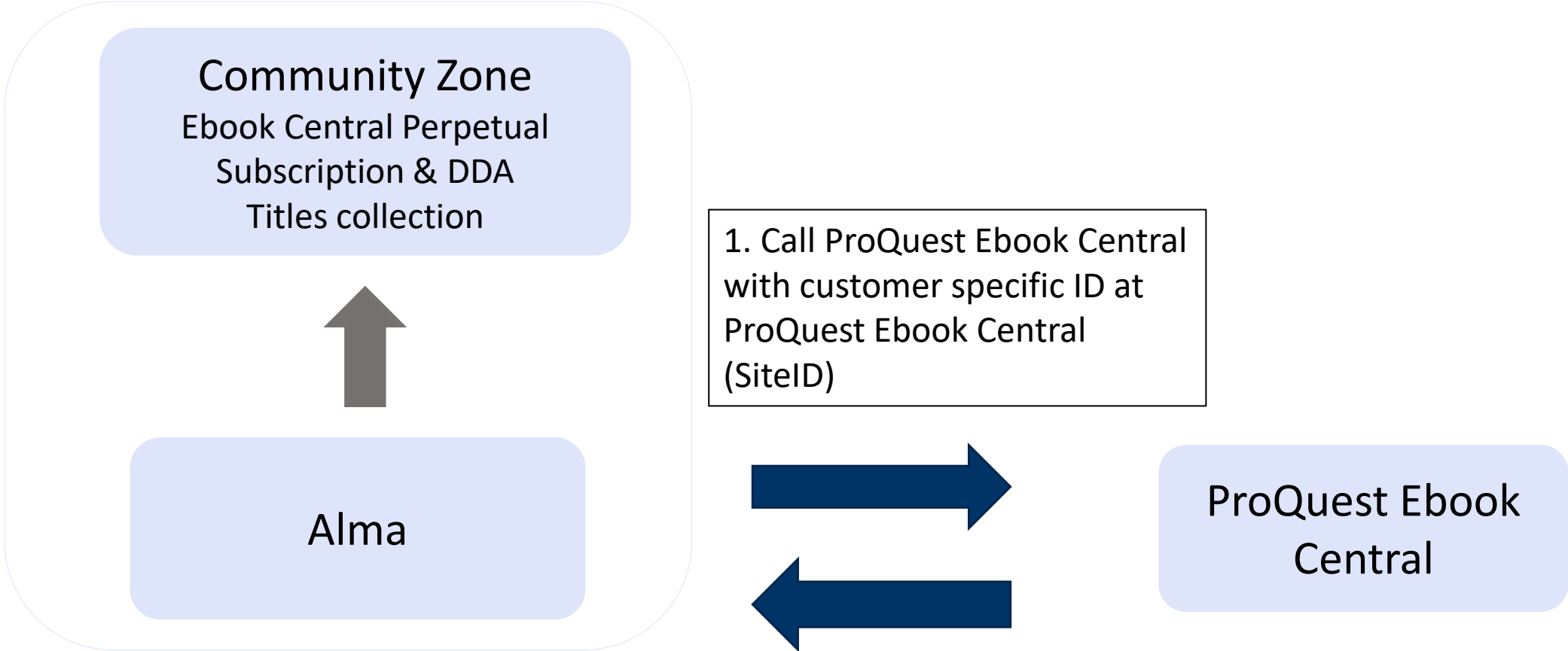- Prepare for initial outreach from ProQuest about autoholdings

What is autoholdings?

- Automated process where all ProQuest Ebook Central titles are activated in Alma

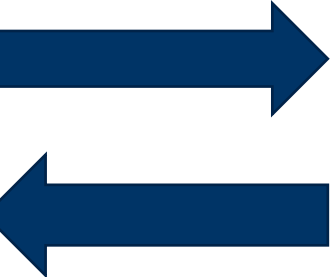- Ex Libris documentation calls it "Upload Electronic Holdings"

Is this new?

- Autoholdings existed previously
  - Only for owned and DDA titles
  - Updated weekly or less frequent

- Autoholdings with new "enhanced integration profile"
  - Owned, DDA, and Subscription
  - Updated daily
  - Updates appear in 24 to 48 hours
  - Purchase model indication for each portfolio

How does it work?

Community Zone
Ebook Central Perpetual
Subscription & DDA
Titles collection

Alma

ProQuest Ebook Central

1. Call ProQuest Ebook Central with customer specific ID at ProQuest Ebook Central (SiteID)

2. **Daily** retrieve customer specific electronic holdings:
- DDA titles
- Owned Titles
- Subscription

3. Activate & Manage customer specific electronic holdings in Alma

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What are the benefits?

- Daily incremental loads of all Ebook Central content: owned, DDA, and subscribed titles.

- No manual activations for individual titles in Ebook Central.

- Once a DDA title is triggered for purchase, the purchase model will be updated via autoholdings in the next daily load.

- Territorial restrictions are not an issue because autoholdings only delivers the titles an institution has access to.

- Set up reports to show any changes or deletions.

What are the considerations?

- Must use the *Ebook Central Perpetual, DDA, and Subscription titles* Community Zone collection.
- Enhanced or customized records can be difficult to retain and maintain.
- To participate in the Training and Consulting Partner-led project, you must activate all Ebook Central content.
  - Owned, DDA, and subscription
  - Can proceed on your own if you do not want all Ebook Central content.
- Each institution is different → individual consultations are needed.

Example consultation questions

- Do you use Alma to maintain your purchasing data (PO Lines) for Ebook Central ebooks?

- If so, how does that order information get into Alma?

- How do you manage Ebook Central records in Alma?
  - Community Zone, Institution Zone, Free-Floating Portfolios

- If you use Community Zone records, are you making any adjustments to those records once you activate titles?

What are the steps in this process?

Outreach
- ProQuest TCPs will reach out to all CARLI members.
- TCPs will schedule consultations with individual members who are interested in the project.

Decision
- You decide if you would like to proceed.
- If so, TCP sends case to Ex Libris.

Completion
- Ex Libris will let TCP know when autoholdings has been set up.
- TCP will let institution and CARLI know it is complete.

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Where can you find more details?

- [Upload Electronic Holdings from ProQuest Ebook Central for Subscriptions/Owned/DDA](#) (Ex Libris Knowledge Center Article)
  - If you participate in the TCP-led project, TCPs and Ex Libris will take care of the steps in the "[Self-Service Workflow](#)"

What are your next steps?

Review
- Review [Upload Electronic Holdings from ProQuest Ebook Central for Subscriptions/Owned/DDA](#).

Watch
- Watch for an email in the next few weeks from Heather Mitchell-Botts, Amanda Richio, or Kristin Johnson.
- If you're ready to get started NOW, email kristin.johnson@clarivate.com.

Reply
- Reply to email.
  - Not interested, questions, and/or consultation times

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Recap of Today's Objectives

- Know the benefits of autoholdings

- List some of the considerations of autoholdings

- Prepare for initial outreach from ProQuest about autoholdings