

Autoholdings for ProQuest Ebooks into Alma for CARLI

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Part of **Clarivate**

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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

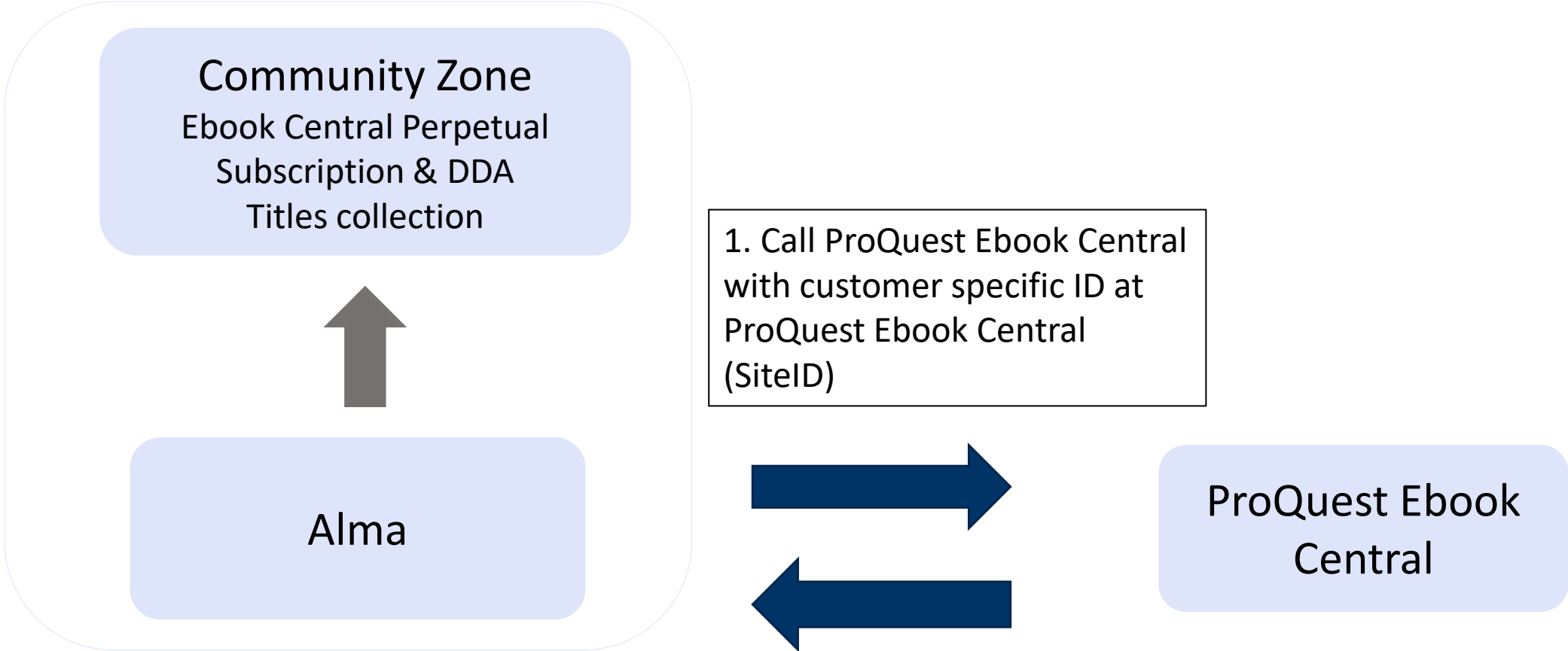
What is autoholdings?

- Automated process where all ProQuest Ebook Central titles are activated in Alma
- Ex Libris documentation calls it “Upload Electronic Holdings”

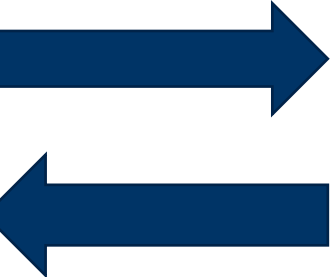
Is this new?

- 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?



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



ProQuest Ebook Central

3. Activate & Manage customer specific electronic holdings in Alma

2. **Daily** retrieve customer specific electronic holdings:

- DDA titles
- Owned Titles
- Subscription

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.

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”](#)

Ex Libris Knowledge Center
Part of Clarivate

Alma

Home » Alma » Product Documentation » Alma Online Help (English) » Integrations with External Systems » Resource Management » Upload

Upload Electronic Holdings from ProQuest Ebook Central for Subscriptions/Owned/DDA

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ProQuest Ebook Central Upload Electronic Holdings integration allows you to automatically manage (activate/deactivate) the electronic resources to which you have access via the ProQuest Ebook Central platform (based on your Ebook Central site ID). This service eliminates the need for human intervention when activating the electronic resources of the Ebook Central platform for any electronic title, whether it is part of a subscription, a PDA/DDA program, or individually owned/purchased titles.

ProQuest Ebook Central Upload Electronic Holdings integration handles the following ProQuest Ebook Central titles:

- **Owned** – Ebook titles that were purchased as perpetual-access, single Ebook titles
- **Subscription** – Ebook titles that are part of a subscription (live or on trial)
- **DDA** – Ebook titles that are part of the ProQuest PDA/DDA (Patron Driven Acquisition/Demand Driven Acquisition) program

Once all the configurations have been set up, the Alma Ebook Central workflow works as per the below:

How Does It work?

Community Zone
Ebook Central Perpetual
Subscription & DDA Titles
collection

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

Table of contents:

1. Self-Service vs. Support Assistance When Setting Up the Upload of Electronic Holdings from ProQuest Ebook Central
2. Self-Service Workflow
3. Requesting ProQuest to Enable Automatic Updates
4. Activating Ebook Central Perpetual, DDA and Subscription Titles
5. Creating a ProQuest Ebook Central Integration Profile
 - 5.1. Distributed Electronic Access
6. ProQuest Ebook Central Subscriptions
7. Purchase Model
 - 7.1. Searching Using the Purchase Model Indication
 - 7.2. Purchase Model in Analytics Reports
8. Acquisitions - Recording an Order
9. Preserving Previous Ebook Central Acquisition Details
10. Sandbox Testing
11. Viewing the Job Report
12. ProQuest Ebook Central Integration for Consortia
13. Usage Reports

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

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