Managing Electronic Resources
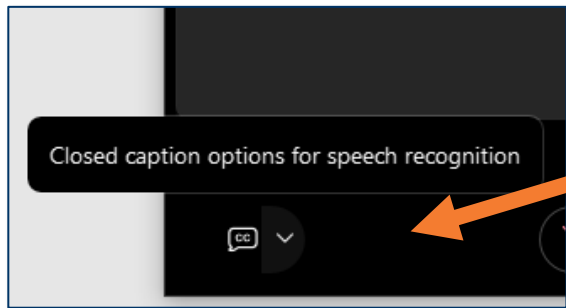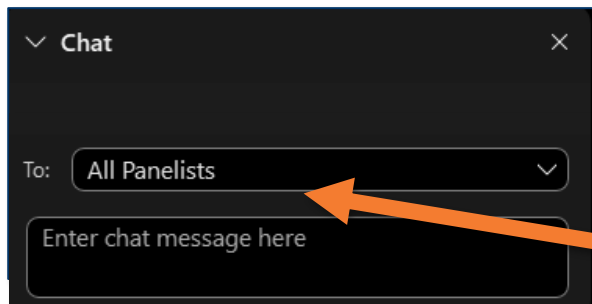
ERM Bonus 2
Automate Holdings Management for ProQuest Ebook Central

Kevin Lane-Cummings and Rachel Bellavia

Customer Education Team

Alma

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A few points about WebEx

- Technical issues? Exit and rejoin the WebEx session

- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu

- Turn captions on and off in the lower-left corner of the WebEx screen

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Managing Electronic Resources Series

ERM	Session	Date
101	Overview and Background	Sep 20
102	Order and Activate Collections	Sep 27
103	Order and Activate Portfolios	Oct 4
201	Maintain E-Resources	Oct 11
202	Troubleshoot Discovery	Oct 18
203	Overlap Analysis	Oct 25
301	Usage Statistics, COUNTER, and SUSHI Harvesting	Nov 1
302	Analytics of E-Resources	Nov 8
B-1	Contribute to the Community Zone	Nov 15
B-2	**Upload Electronic Holdings for E-Book Central ...**	**Nov 29**

Agenda

- **Overview and Workflow**
- Activate the Collection in CZ/IZ
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- Further Resources
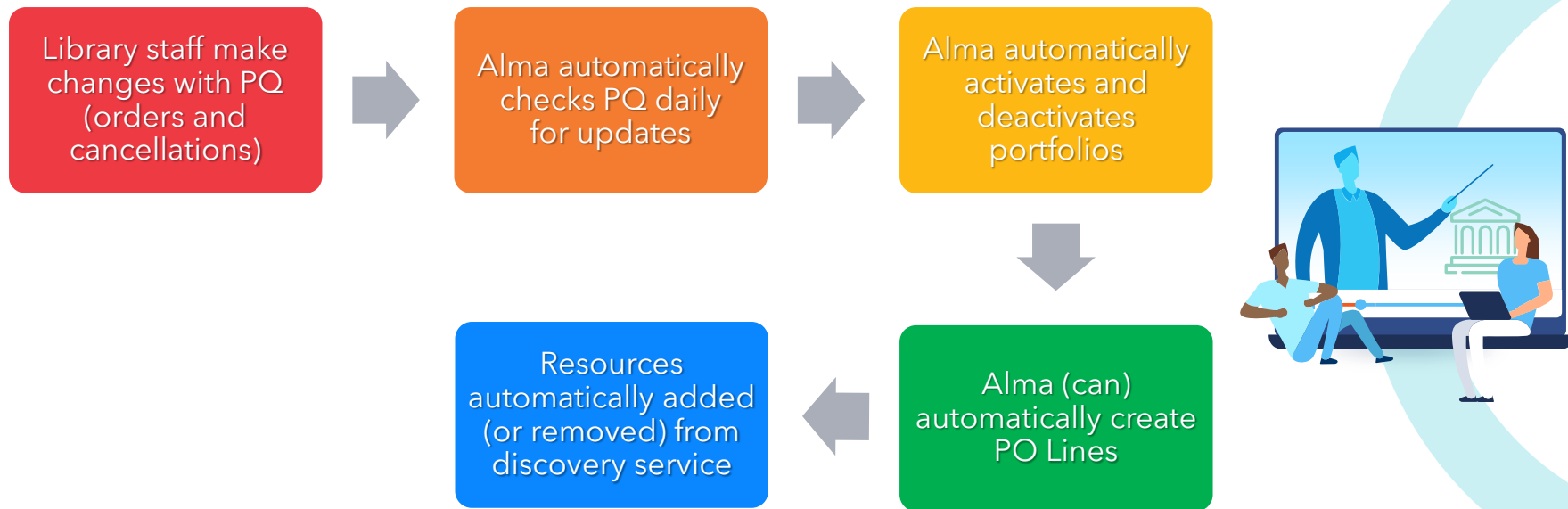
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What This Tool Can Do

Automatically manage (activate and deactivate) all the e-resources you access via the ProQuest Ebook Central (EBC) Platform

- Owned titles (perpetual access)
- Subscription titles (live or trial)
- PDA/DDA (Patron- and Demand-Driven Acquisition)

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Post-Configuration Workflow

```
Library staff make     →     Alma automatically     →     Alma automatically
changes with PQ              checks PQ daily              activates and
(orders and                  for updates                 deactivates
cancellations)                                           portfolios
                                                              ↓
Resources              ←     Alma (can)
automatically added          automatically create
(or removed) from            PO Lines
discovery service
```

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You don't have to do this yourself!

Ask Ex Libris' Alma Support Team to set these configurations.

- Save time!
- Ensure the configuration is correct!

Configuration Steps

1. Contact ProQuest Support

- Ask them to enable automatic updates
- Get EBC Site ID

2. Contact Alma Support

- Ask them to set up required parameters

3. Activate the EBC Perpetual, DDA … collection

- Deactivate other (manually updated) EBC collections

4. Create EBC Integration Profile

5. Set up order-recording process (if desired)

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Activate the Collection

Ebook Central Perpetual, DDA and Subscription Titles

- Activate Collection and Service
- Don't activate individual portfolios

- If it's already activated (with some portfolios):
  - This tool will keep things going
  - Local portfolio information will be preserved

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De-Activate All Other Ebook Central Subscriptions

This system automatically handles **all** ProQuest Ebook Central subscriptions.

Deactivate the rest to avoid duplicate portfolios:

- Ebook Central Academic …

- Ebook Central Science …

- Ebook Central University of …

All collections that start "Ebook Central …"

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Configure Order-Recording System

(after placing order with ProQuest)

Three options for recording the order in Alma:

- PO line created via Real Time Order
- PO line created via EOD using "New Order" import profile
- PO line created manually

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PO Line Created via Real Time Order

1. "New Order" API is sent from PQ to Alma.

2. Alma searches IZ for that portfolio by Ebook Central title ID or ISBN.

3. If match found in IZ, PO line is associated with that portfolio.

4. If no match found, Alma searches CZ for that portfolio in "Ebook Central Perpetual .."

   • Portfolio is activated in IZ and associated with the PO line.

PO Line Created via EOD File and Import Profile

1. Configure a New Order import profile
   - Copy "PQ Ebook Central import profile"
   - Configure profile to correctly match (**demo**)
2. Run import profile on EOD file.
3. Alma searches IZ (and, if needed, CZ) for matching portfolio (just like previous page) and associates portfolio with new PO line.

PO Line Created Manually – Use Case 1

If portfolio already was activated by this "Automatic Upload of Electronic Holdings" process, then:

1. Find portfolio in IZ in collection "Ebook Central Perpetual …"

2. Click Order on the portfolio
   - Fill out details as needed for previous order

3. Next time, this will update automatically

PO Line Created Manually – Use Case 2

If portfolio was purchased outside Alma (LibCentral for example) and is not yet activated:

1. Find portfolio in CZ in the collection "Ebook Central Perpetual …"

2. Click Order on the portfolio
   - Fill out details as needed for the order

3. Portfolio is activated and associated with PO

4. Next time, this will update automatically

Preserve Previous Ebook Central Acquisition Details

(Because you acquired Ebook Central portfolios in other collections, which are now deactivated.)

1. Create a Set (content type = electronic collections) that includes the other Ebook Central collections
2. Run the Job "Move electronic portfolio information" **demo**

Institutions with Rialto

1. Rialto allows selection and purchasing right within Alma
2. Automated Holdings Management works great with Rialto
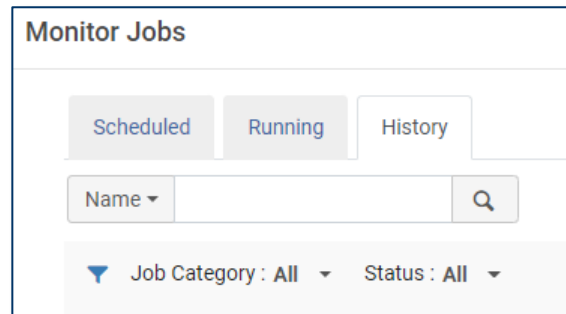3. Request assistance from Rialto Support

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When You Test This in Your Sandbox

Enable FTP connection for the ProQuest feed files:

1. Alma Configuration

2. General menu > External Systems > Allowed S/FTP connections

3. Add FTP:

   ftp.ebrary.com / ftp.ebrary.com

4. Save

(Not needed in your Production environment; these are already enabled.)

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View the Job Report

Admin > Monitor Jobs > History tab

Job:

Upload electronic holdings - PROQUEST_EBOOK_CENTRAL

- There may be multiple runs on the same day (Alma keeps trying when errors occur)

Monitor Jobs

Scheduled | Running | History

Name ▼ | [ ] | 🔍

▼ Job Category : All ▼   Status : All ▼

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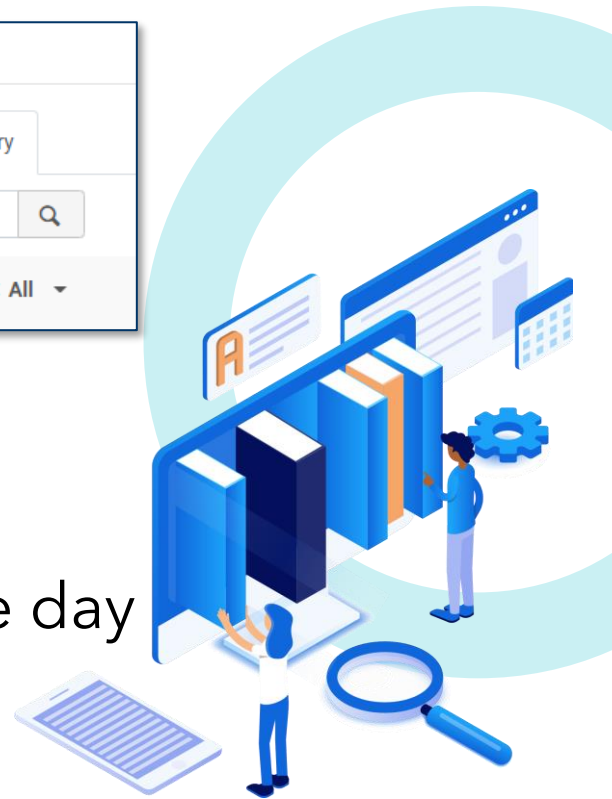
View the Job Report (cont.)

Report includes:

- Activated portfolios

- Updated portfolios

- Deleted portfolios

- Portfolios not in CZ

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Documentation

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

About Today's Session

- Download these presentation slides
- Watch recordings of this session (and previous sessions)
- Take the (optional) exam)
- No exercise document to download, because …

Exercise

- Set up automated holdings management for Ebook Central resources

- Use the documentation to guide your work: [Upload Electronic Holdings from ProQuest Ebook Central for Subscriptions/Owned/DDA](#)

- Or ask the Alma Support Team to do it!

SANDBOX ONLY!
(at first)

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Thank you!

Please fill out the survey that will appear when you close the WebEx meeting

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