

How to set up automatic holdings for e-resources

Introduction

Alma has a feature that allows e-resource providers to set a library's ebook, ejournal, and database holdings in the Institution Zone (IZ) on behalf of that library and update them on a regular basis. This eliminates the need for manual activation/deactivation and setting date thresholds. There are currently four participating providers: Elsevier, Ovid, ProQuest, and Springer. Review the [considerations](#) to determine whether the advantages outweigh the disadvantages for your library.

Workflow

1. Communicate with the provider. Some providers allow you to obtain all the necessary information from their administration site, while others may require you to send them instructions to set up this feature.
 1. Elsevier: create an institution token in the Elsevier admin tool
 2. Ovid: contact Ovid to request your user name, password, and Ovid group
 3. ProQuest: submit a support case to ask for automated holdings
 4. Springer: create an institution token in the administrative site
2. Activate Community Zone (CZ) collections. The provider will activate individual titles from these electronic collections, which will result in the bibliographic records and electronic portfolios for your e-resources being copied from the CZ to your IZ.
 1. Elsevier ScienceDirect Books Complete
 2. Elsevier ScienceDirect Journals Complete
 1. Books@Ovid Subscription Complete
 2. Books@Ovid Purchase Complete
 3. Journals@Ovid Complete
 1. Ebook Central Perpetual and DDA Titles
 1. SpringerLink Journals - AutoHoldings
 2. SpringerLink Books - AutoHoldings

1. Elsevier
 2. Ovid
 3. ProQuest
 4. Springer
3. Create integration profiles. Within Alma Configuration, you need to create a separate integration profile for each provider. The process for creating these profiles is the same for every provider:
1. Select a provider
 2. Enter account information (obtained in step 1)
 3. Schedule the updates

Considerations

- Advantages
 - No manual intervention. This can save a lot of staff time, especially when there are few staff members dealing with e-resources or the library has a large number of holdings.
 - Accurate and detailed holdings
 - Theoretically, the provider has the most current list of your entitlements, so you do not need to figure out all of your holdings.
 - The provider enters date thresholds by the month, year, and sometimes volumes, whereas library staff often only enter the year.
 - Frequent updates
 - The jobs can be run weekly, so necessary changes are made right away, instead of waiting for staff to get around to it.
- Disadvantages
 - Varying degrees of quality in CZ records
 - Some are thorough and some are incomplete
 - Occasionally the records in CZ describe print instead of online.
 - A small percentage of records have incorrect metadata like OCLC number and ISSN.
 - Varying degrees of quality in CZ metadata
 - Some of the electronic collections do not contain all of a provider's titles
 - There may not be records/portfolios for journal title changes
 - ProQuest purchase order lines. ProQuest is the only provider that also creates PO lines (POLs) for every title it activates.
 - Duplicate existing orders
 - When the job runs for the first time, ProQuest will create a POL for every title you have ever purchased, even if there already exists a POL for that purchase.
 - Not much acquisitions data

- The POLs do not contain fund or price information, so they will need to be manually edited

Relevant Documentation

- [Upload Electronic Holdings from Elsevier](#)
- [Upload Electronic Holdings from Ovid](#)
- [Upload Electronic Holdings from ProQuest Ebook Central](#)
- [Upload Electronic Holdings from Springer](#)

Last updated 2/27/2020

Revision #6

Created 24 April 2023 17:03:35 by Aaron Krebeck

Updated 8 November 2023 17:00:51 by Jackie Saavedra