

Session 2 Q&A: AutoHoldings Optimization

- Question: Will the vendors have the freedom of also loading open access journals into a subscription collection during the auto holdings process? If so, is there an automatic way to mark them as open access?..... 1
- Question: I'd like to hear from other member libraries about the accuracy of auto-holdings from different vendors. I'd also like to know how ExLibris is working with vendors to improve this, if they are able to at all. (Wiley seems especially problematic for us.)..... 3
- Question: With ebook auto holdings for ProQuest and JSTOR, is there a way to display the acquisition model in Primo? It would be useful for our library staff to see this information, and it's pretty hard for them to find in Alma..... 4
- Question: I would like to understand more about what happens when we activate/deactivate/edit portfolios in an auto-holdings collection. For example, if I delete or deactivate a portfolio in the Springer Auto Holdings collection, for whatever reason, will it get reactivated/added? If I edit a parser/url in a portfolio in the Wiley Auto Holdings collection will my override disappear at some point? What if I activate a portfolio that we have access to, but the auto holdings collection thinks we don't? Will it get deactivated?..... 5
- Question: How does auto holdings work with perpetual access? Is auto holdings able to add and update coverage (either current or perpetual) when there is not continual coverage (ie multiple lines of coverage)?..... 5
- Question: Is auto holdings able to update CZ portfolios that are linked to non-CZ bibs (NZ bibs)?..... 6
- Question: Is auto holdings able to update local collections (ie both portfolio and bib are local)?..... 6
- Question: Is an emailed notification possible if the auto holdings job fails (and information provided about what caused the failure)?..... 6
- Question: Is a separate auto holdings job needed for each collection from a provider?..... 7
- Question: Are CDI settings able to be configured in an auto holdings job, or are the CDI settings retained (or does the auto holdings process not touch CDI settings at all)?..... 7
- Question: What have been the most common benefits customers have noted about auto holdings? What have been the most common problems reported? What are the pros and more importantly cons?..... 7
- Question: We have a current subscription to the Springer books collection (Complete Protocols) and all 3,316 are in the Autoholdings Collection and all are in our Autoholdings Collection. Is there a way to manage orders that include multiple portfolios, but aren't an entire collection?..... 8
- Question: Why aren't all former titles of a journal reflected in the autoholdings collection? I have had multiple instances where a former title is not in the autoholdings collection and my users can't find the articles from the previous title because it's no longer active. Is there a way

to make sure that all previous titles are in the autoholdings collection so the KBART works properly?.....	8
Question: What is the recommendation for handling inaccurate vendor-reported coverage, since the process overwrites manual changes?.....	8
Question: Does the autoholdings remove the Perpetual Coverage date information?.....	8

Question: Will the vendors have the freedom of also loading open access journals into a subscription collection during the auto holdings process? If so, is there an automatic way to mark them as open access?

Vendors can load open access journals.

The open access journals are “marked” on the level of the bibliographic record as follows.

If the bibliographic record in the CZ has the open access designators then they can be searched as open access and will display as open access. See [Peer Reviewed and Open Access in Alma.docx](#)

Open Access appears in Alma with a clear indication when there is:

- 506 field with first indicator 0 with the text **Unrestricted online access**
- 506 field with first indicator 0 subfield f and text **star** (star is Standardized terminology for access restriction)

All titles ▾ Zone: ☒ Institution ☐ Community

Open access ▾ Equals ▾ Yes ▾

AND OR Subjects (LC) ▾ Contains Keywords ▾ Feminism Utah

Clear form Search

All Titles (1 - 1 of 1) where (Open access equals "Yes" AND Subjects (LC) contains keywords "Feminism Utah") Save Query

☒ Institution ☐ Community

Sort by: Rank ▾ Secondary Sort by: Rank ▾ Expand ▾

1 Leave the dishes in the sink [electronic resource] : adventures of an activist in conservative Utah / Alison Comish Thorne. [Edit Record](#) [Portfolio List](#) [...](#)

Book (Book - Electronic) text; computer; online resource By Thorne, Alison Comish. (Logan, Utah : Utah State University Press c2002.)

Subject: Thorne, Alison Comish. College teachers--Utah--Biography. Women college teachers--Utah--Biography. and others

Open Access

Medium Type: [electronic resource] :
Language: English
ISBN: 1-283-26688-1 and others
Record number: (CKB)111056486848424
Update Date: 11/16/2018

546	__	a English
506	0_	a Open Access f Unrestricted online access 2 star
504	__	a Includes bibliographical references (p. 248-273) and index.
600	10	a Thorne, Alison Comish.
650	_0	a College teachers z Utah v Biography.
650	_0	a Women college teachers z Utah v Biography.
650	_0	a Feminism and education z Utah.
655	_4	a Electronic books.

Question: I'd like to hear from other member libraries about the accuracy of auto-holdings from different vendors. I'd also like to know how ExLibris is working with vendors to improve this, if they are able to at all. (Wiley seems especially problematic for us.)

Here are statistics (with number of institutions) on how the Upload Electronic Holdings Integration is being used around the world and at Alliance:

Number of institutions using Upload Electronic Holdings Integration around the world

System Type	System Type	System Type	System Type	System Type	System Type	System Type	System Type	System Type
Springer	Ovid	Elsevier	ProQuest E Book Central	Wiley	Taylor and Francis	Project MUSE	JSTOR	Preselect
587	278	566	809	412	261	102	78	3

Number of institutions using Upload Electronic Holdings Integration at Alliance

System Type	System Type	System Type	System Type	System Type	System Type	System Type	System Type	System Type
Springer	Ovid	Elsevier	ProQuest E Book Central	Wiley	Taylor and Francis	Project MUSE	JSTOR	Preselect
11	2	9	6	10	4	2	2	0

Question: With ebook auto holdings for ProQuest and JSTOR, is there a way to display the acquisition model in Primo? It would be useful for our library staff to see this information, and it's pretty hard for them to find in Alma. (Use case: Some staff use Primo as their primary work environment - not Alma.)

It's not currently possible to display this information in Primo. The [Access Model](#) can be shown, but the Purchase Model cannot.

The acquisition model appears in Alma very clearly in the portfolio repository search results and also can be searched in Alma. See below.

Electronic Portfolios (1 - 20 of 101,796)

where (Purchase Model equals (Subscription))

 Institution

 Community

Sort by : Rank ▾

1 Rubble Music Occupying the Ruins of Postwar Berlin, 1945–1950 / Abby Anderton.

Ebook Central Perpetual, DDA and
Subscription Titles: Full Text

Purchase Model: Subscription

ISBN: 0-253-04243-7

ISBN (13): 9780253042439

Access Type: Current

Electronic Material Type: Book

Date: 19/07/2024

24:01:22 BST

Modification Date: 19/07/2024

24:01:23 BST

Portfolio ID: 53201175860008046

Service ID: 62175929060008046

Collection ID: 61175929070008046

MMS ID: 991008583727608046

 **Electronic collection**

management level: Ex Libris



● Available For (1)

[Other details](#)

Search in: **Electronic portfolios** ▾ Zone:  Institution  Community

Electronic Portfolio **Purchase Model** ▾

Equals ▾

PROQUEST : Subscription ✕ ▾

JSTOR >

PROQUEST ▾

[Select All](#)

DDA Candidate

Owned

✓ Subscription

[Search](#)

Question: I would like to understand more about what happens when we activate/deactivate/edit portfolios in an auto-holdings collection. For example, if I delete or deactivate a portfolio in the Springer Auto Holdings collection, for whatever reason, will it get reactivated/added? If I edit a parser/url in a portfolio in the Wiley Auto Holdings collection will my override disappear at some point? What if I activate a portfolio that we have access to, but the auto holdings collection thinks we don't? Will it get deactivated?

The vendor includes in the file all electronic resources for which the institution has a subscription.

If the vendor puts an electronic resource in the file and something is different in your institution for the same resource that is in the file, then the resource in the file will overwrite the resource in the institution.

Question: How does auto holdings work with perpetual access? Is auto holdings able to add and update coverage (either current or perpetual) when there is not continual coverage (ie multiple lines of coverage)?

Auto holdings **does** update coverage. This is because the KBART file used by the auto holdings include

- FROM_YEAR
- TO_YEAR
- FROM_VOLUME
- TO_VOLUME
- FROM_ISSUE
- TO_ISSUE

These values can appear in multiple lines of the Excel file.

Question: Is auto holdings able to update CZ portfolios that are linked to non-CZ bibs (NZ bibs)?

Yes this is possible, but we encourage you to use bibliographic records from the Community Zone.

Question: Is auto holdings able to update local collections (ie both portfolio and bib are local)?

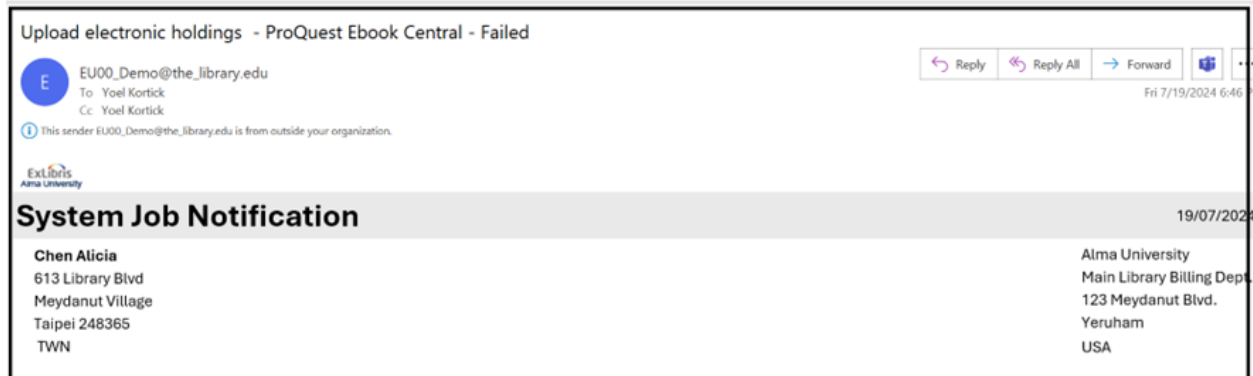
Auto Holdings updates only portfolios in the relevant electronic collection activated **from the Community Zone**

Question: Is an emailed notification possible if the auto holdings job fails (and information provided about what caused the failure)?

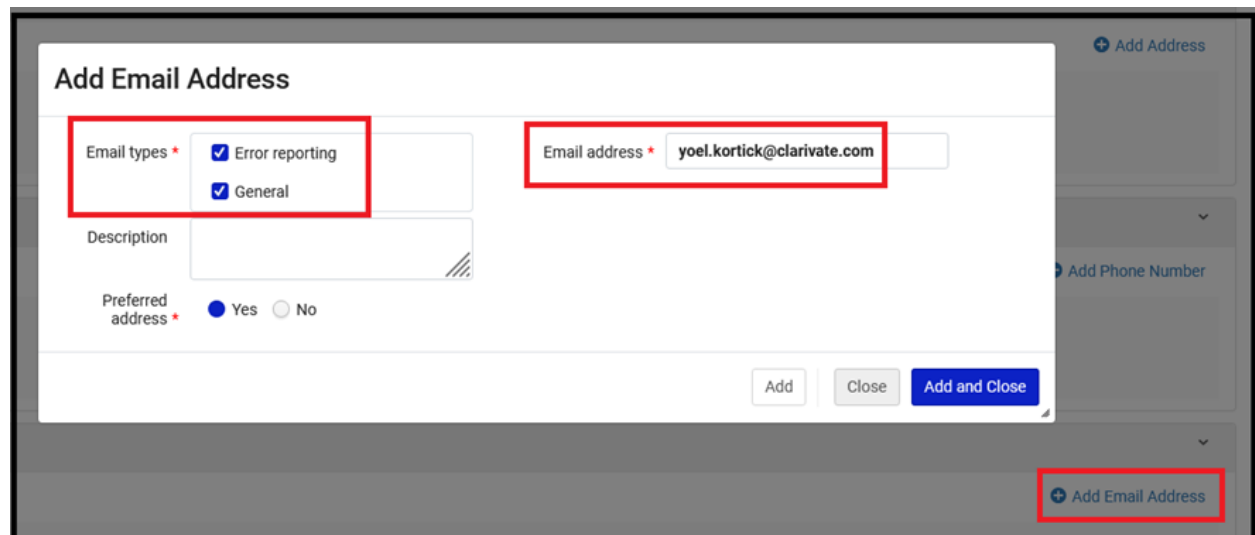
This is possible.

In the integration profile an email or several emails can be defined for job reports and error reporting and then an email is sent when the job completes.

Here is the email:



Here is the configuration on the integration profile:



Question: Is a separate auto holdings job needed for each collection from a provider?

One auto holdings profile is needed per vendor even if the auto holdings uses multiple electronic collections for the provider.

For example, one profile is needed for Springer, and Springer has two electronic collections which can be updated via the job:

- SpringerLink Journals - AutoHoldings (Community Zone Collection ID = 613860000000000884)
- SpringerLink Books - AutoHoldings (Community Zone Collection ID = 613860000000000883)

Question: Are CDI settings able to be configured in an auto holdings job, or are the CDI settings retained (or does the auto holdings process not touch CDI settings at all)?

CDI settings are not part of the auto holdings configurations.

CDI settings do not get changed by the auto holdings job running.

CDI settings are saved at the time of electronic collection activation.

Question: What have been the most common benefits customers have noted about auto holdings? What have been the most common problems reported? What are the pros and more importantly cons?

Here are benefits. Ex Libris is not aware of a corresponding list of “cons”.

- Via a simple setup the institution is able to automatically receive updates from vendors to update the holdings of the electronic resources.
- Portfolios can be automatically updated, activated and deleted, and are specific to the purchase of the institution.
- No manual work is needed.

This is a great time saver, replacing the need to get the files from the vendor, make sure they are in proper format, and manually load them to Alma.

Question: We have a current subscription to the Springer books collection (Complete Protocols) and all 3,316 are in the Autoholdings Collection and all are in our Autoholdings Collection. Is there a way to manage orders that include multiple portfolios, but aren't an entire collection?

The [Upload Electronic Holdings from Springer](#) works on these two electronic collections from the Community Zone:

- SpringerLink Journals - AutoHoldings (Community Zone Collection ID = 613860000000000884)
- SpringerLink Books - AutoHoldings (Community Zone Collection ID = 613860000000000883)

A different electronic collection cannot be used in conjunction with the [Upload Electronic Holdings from Springer](#)

The above electronic collections must be activated in the institution, and it is not possible to designate a specific subset of the electronic collection to be used.

In accordance with the “Institution token id” which is entered in the Springer Upload Electronic Holdings file, Springer will update everything purchased by the institution.

Question: Why aren't all former titles of a journal reflected in the autoholdings collection? I have had multiple instances where a former title is not in the autoholdings collection and my users can't find the articles from the previous title because it's no longer active. Is there a way to make sure that all previous titles are in the autoholdings collection so the KBART works properly?

The reason why specific and certain titles may not be in a specific electronic collection in the Community Zone is because the vendor did not provide those titles to the Ex Libris content team. The Ex Libris content team receives the electronic collection content from the vendors and loads to the Community Zone. Therefore this is a question for the vendor. This is the case for all electronic collections and not only those related to auto holdings. Ex Libris does not determine what titles are in each electronic collection in the Community Zone.

Question: What is the recommendation for handling inaccurate vendor-reported coverage, since the process overwrites manual changes?

If the vendor is supplying inaccurate data to the institution regarding the coverage for journals purchased by the institution, then the institution should contact the vendor. Ex Libris has worked with the vendors regarding the **format** of the files used in Alma for “Upload Electronic Holdings”. The **content** of the files is between the vendor and the institution.

Question: Does the autoholdings remove the Perpetual Coverage date information?

All Coverage Information, as it appears in the “Coverage” tab of the “Electronic Portfolio Editor”, is updated from the file supplied by the vendor for the “Automatic Upload Electronic Holdings integration”.

If the vendor supplies coverage dates which differ from the dates the institution has in Alma before the integration runs, then the coverage dates in Alma will change.

Note that what is supplied by the vendor for the integration should be the most accurate, because the vendor “knows” what the institution has purchased via the unique identifier (such

as the “Site ID” or “Institution token id”) in the Automatic Upload Electronic Holdings integration.