



Charles Sturt
University

Celebrating
30 years in 2019

Grappling with ProQuest Ebook Central integration in Alma

IGeLU 2019 Conference

Roshan Thapa

Coordinator, Library Discovery Services & Fulfilment

27 August, Singapore

About Charles Sturt University



Image: Charles Sturt University

- ✓ Australia's 8th largest public university.
- ✓ Australia's largest online education provider.
- ✓ 40,000+ students.

Multiple Campus Libraries

Resources (Aug 2019)

Physical: 524,390 items Electronic: 424,255 portfolios



Images: Charles Sturt University



Albury-Wodonga



Bathurst



Dubbo



Orange



Port Macquarie



Wagga Wagga

**Upload Electronic Holdings
from
ProQuest Ebook Central**



Alma release – Feb 2018

ProQuest Ebook Central Integration

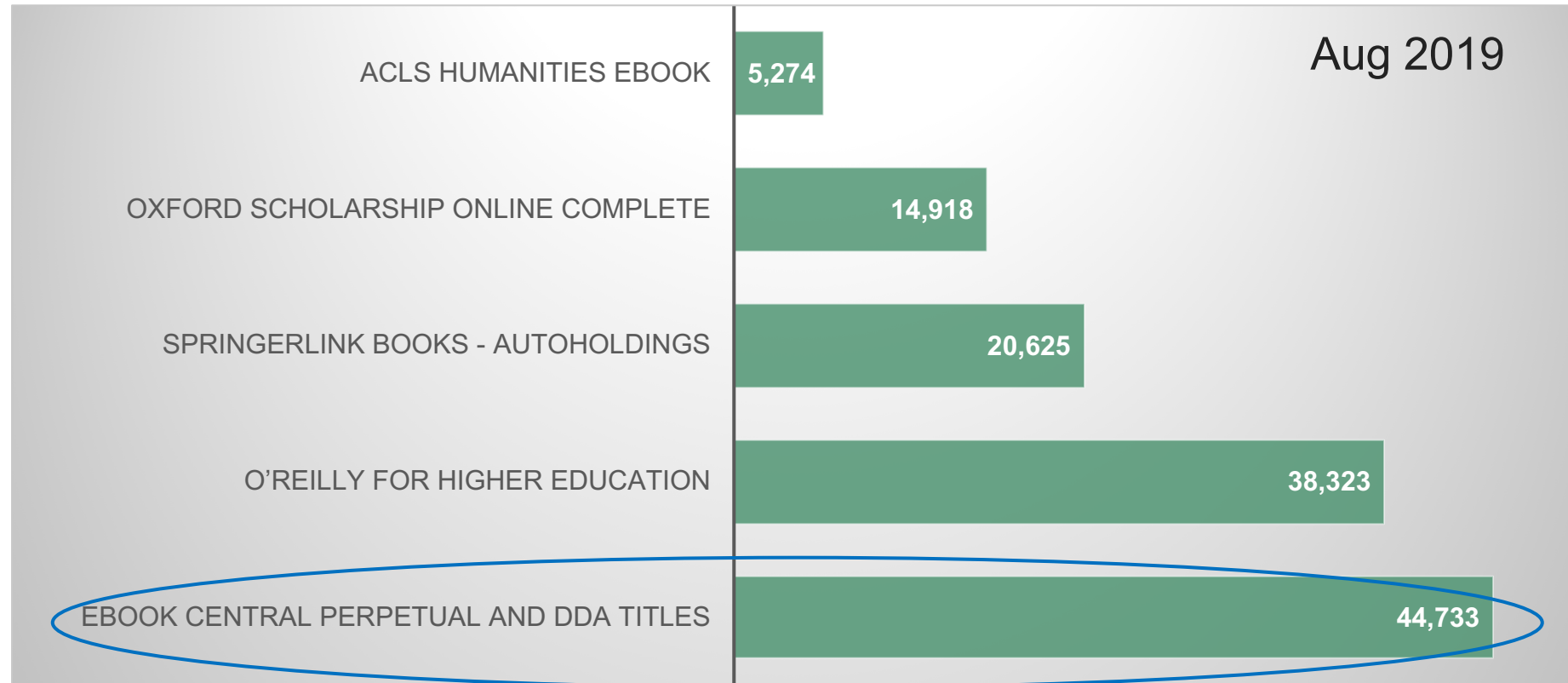
February 2018 Resource Management

Institutions that would like to automatically update ProQuest Ebook Central electronic resources can now do so with Alma's Upload Electronic Holdings integration capability. See [Upload Electronic Holdings from ProQuest Ebook Central](#) for more information.

For customers planning to be early adopters of this feature, you are reminded to use your sandbox environment first to complete a configuration and then test the configuration of this functionality.

Source: Alma 2018 Release notes

eBook portfolios

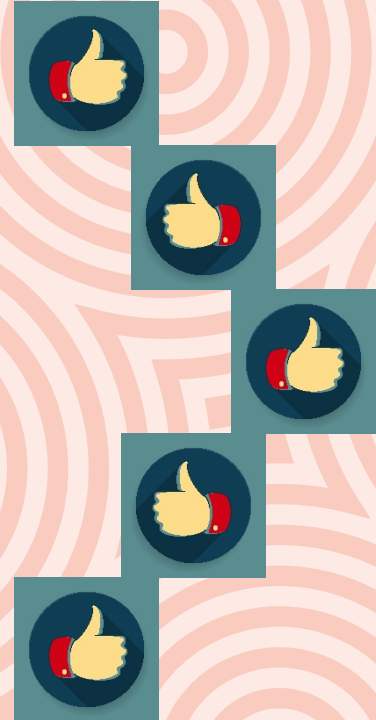


Why did we want to try this integration?

- ❑ Existing process for updating collection was manual
 - Obtain monthly files from PQ
 - Use Portfolios Loader for incremental updates and deletes
- ❑ Integration Features

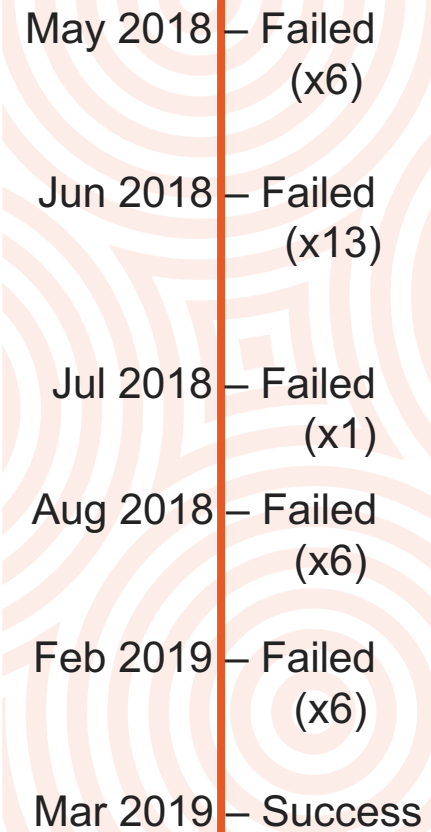
The automatic upload of electronic holdings for ProQuest Ebook Central provides institutions the ability to automatically activate/deactivate the electronic resources to which they have access via the ProQuest Ebook Central platform based on their Ebook Central site ID. This service eliminates the need for human intervention when activating the electronic resources of the Ebook Central platform for any electronic title whether it is part of a PDA/DDA program or individually owned/purchased titles.

Source: Alma Product Documentation



Setup and testing in Sandbox

- ❑ Job failed straight away, & kept on failing
- ❑ SF case raised (#548433) May 2018
 - ExLibris - May be related to a known issue already under investigation
 - Requested by ExLibris to modify the site ID to lowercase
 - Electronic inventory reindexed by ExLibris
 - 3 electronic collections with same CZ ID existed – deleted 2 of them
 - Issue to be fixed in July HF release
 - Additional fix part of August release
 - Issue to be fixed in January 2019 release
 - Re-indexing repeated but did not fix the job
 - Issue to be solved in March 2019 release – This time it got FIXED!!!
 - Finally the job ran successfully – YAY!!!



May 2018 – Failed (x6)

Jun 2018 – Failed (x13)

Jul 2018 – Failed (x1)

Aug 2018 – Failed (x6)

Feb 2019 – Failed (x6)

Mar 2019 – Success

Sandbox – Observations, Issues, Solutions

❑ 34000+ Technical PO Lines in review – how to handle?

- Unable to bulk close via running job on set

PO Line	Description
1 CS19-106408	PO Line CS19-106408 is in status In Review and cannot be closed.
2 CS19-106409	PO Line CS19-106409 is in status In Review and cannot be closed.
3 CS19-106406	PO Line CS19-106406 is in status In Review and cannot be closed.

- Can bulk cancel but gets created again when the job runs next
- Can close individual PO Line by clicking 'Order now'

❑ ExLibris: POLs would follow the library's workflow according to the rules set up in its environment – What rules and where???

❑ Setup purchasing review rules

- to automatically send these PO Lines into 'Auto Packaging' which then get closed by the overnight 'Packaging job'


✓ Finally satisfied to an extent – move on to Production

Production - Moment of Truth

- ✓ Job ran successfully – YAY!!!
- ✓ New technical PO Lines went straight to 'Auto Packaging' - Double YAY!!!

(a big) BUT

- ❑ Lots of issues – troubleshooting was like peeling onion to get answers

**Completed Successfully**

Upload electronic holdings - PROQUEST_EBOOK_CENTRAL

Process ID	4101597120002357
Started on	07/05/2019 11:52:34 AEST
Finished on	08/05/2019 06:42:08 AEST
Total run time	18 Hours 49 Minutes 33 Seconds
Status	Completed Successfully
Status date	08/05/2019 06:42:08 AEST
Records processed	11314
Records with exceptions	0

Job Events

Activated portfolios assigned with PDA (6356)

Activated portfolios with new PO line (34083)

Counters

Ebook Central Collection name	Ebook Central ProQuest
Portfolios deleted	5455
Portfolio BIB's deletes	4737
New portfolios activated	5859

Scheduling Problematic

The ProQuest Books division weekly updates occur on Wednesday. The Alma weekly integration job updates occur on Monday. The updates processed on Monday by Alma reflect the updates processed by the ProQuest Books division on the previous Wednesday. This comprises one cycle of updates. Note that with this schedule, some updates (depending on which day of the week that they occur) may take a little more than a week to appear in Alma.

Source: Alma Product Documentation

- ❑ Titles get deleted if activated before the job run on Monday, as the file from PQ would not have included those titles
 - cannot wait for the job to bring titles (delay of a week or longer)
 - need to activate the resource after purchase for discoverability in Primo for access
 - delay not going to work
 - require the job to run as soon as the file becomes available
 - Wednesday - no detail on what time or the time zone

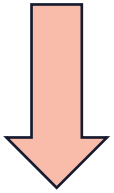
(Later we would find)

- ❖ PQ EBC deposits file on Wed 10:10pm UTC (Thurs 8:10am AEST)
- ❖ Includes all visible titles in Proquest Lib Central

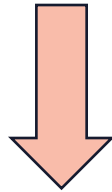
Best scenario – MANUALLY run the job every Thursday morning

Impact on ordering workflow

- ❑ GOBI platform for most orders
- ❑ Turn around time of 3 days for the title to appear in the PQ Lib Central



Manually run job Thursday morning



Restrict GOBI orders to Thurs & Fri

INEFFICIENT



Other issues

- ❑ ~ 300 portfolios with existing PO Lines brought in with new technical PO Lines
 - WHY? Almost impossible to work out the reasons
 - Had to manually fix them
- ❑ Mismatch in CZ

PQ EBC = Clinical Reasoning : Learning to Think Like a Nurse
CZ = Fundamentals of corporate finance
- ❑ Titles owned in PQ EBC but not yet available in CZ
 - Gets deleted by the job if activated locally in Alma
- ❑ After job run – NEED to review all portfolios with new technical PO Lines



Our Expectation

- ❑ Integration will not delete any portfolios with existing PO Lines
 - Tested many times
 - Each time portfolios got deleted (when not in the PQ file, not linked to CZ, mismatch or not yet available in CZ)
- ❑ Contradicted our understanding of portfolios will not be deleted if they have PO Lines attached
- ❑ Needed further clarification on this
- ❑ Job has no details on what portfolios got deleted

Best scenario – portfolios with PO Lines attached not to be deleted

One GOOD thing in all of this mess

- ✓ The DDA titles (not purchased) were also brought in, which meant we had access straight away without having to wait for monthly manual updates
- ✓ The auto purchases came with a Technical PO Line
 - Non-issue for us as we do not create any orders in Alma for DDA auto purchases



What to do NEXT?

- ❑ What's the point in implementing functionality when it does not do what you want?
- ❑ Since integration was already implemented in production, we decided to monitor it for the next few weeks before making a final decision on whether to pursue it further or revert back
- ❑ Email Alma list, obviously – such a great community



Enter ExLibris (+ProQuest)

- ❑ My frustrations in Alma-L alerted ExLibris Product Management
 - ✓ reached out to discuss the integration and the problems
- ❑ We brought ProQuest on board
- ❑ May 2019
- ❑ Meetings - ExLibris, Charles Sturt University team, ProQuest
- ❑ Lots and lots of email communications
 - ✓ numerous clarifications
 - ✓ issues with examples
 - ✓ potential solutions
 - ✓ enhancements & fine tuning



Clarifications & Solutions

- ❑ Process was designed to automatically update the content of the 'ProQuest Ebook Central DDA & Perpetual' collection
- ❑ Any manual addition of portfolios are in risk to be deleted by the process
 - ✓ Process will now be enhanced to preserve manually added portfolios (local or CZ) that have a PO Line attached
- ❑ Process can only be scheduled to run on Monday
 - ✓ Provide additional scheduling options
- ❑ CZ issues (mismatch and not available)
 - ✓ Raise SF



Progress

- ❑ Mid-July 2019: 2 changes deployed
- ✓ Portfolios that have a PO Line will not be deleted
 - ❖ Controlled by using a customer parameter (turned off by default)
- ✓ Additional scheduling options for the integration profile
 - ❖ Ability to choose any day of the week, BUT
 - ❖ Still uses the weekly update file deposited on Wednesday



Better results

- ❑ Job run after enhancement was the best so far
 - ✓ No deletion of portfolios that we wanted to keep in our collection. Yay!!!

- ❑ Continuing issues
 - ❖ Mismatch with CZ
 - ❖ No details in job report for deleted and activated portfolios

Is the process beneficial to us?

- ✓ Yes
- ✓ Less time spent managing collection
- ✓ Weekly updates instead of monthly including access to DDA titles
- ✓ Improved engagement with students
- ☐ Weekly monitoring after job run (minimal time spent)
- ☐ Still a work in progress



Some suggestions

- ✓ Definitely Sandbox first
- ✓ Liaise with ProQuest before setting up the integration
- ✓ Link portfolios to CZ
- ✓ Setup Purchasing Review Rules for auto handling of technical PO Lines
- ✓ Turn on the parameter to not delete portfolio with PO Line
- ✓ Do not add local portfolios if not required for discovery
 - ❑ Wait for it be available in CZ
- ✓ Monitor portfolios after weekly job run for issues



Things to note

- ❑ Integration matches portfolios by bkey
 - ✓ When bkey changes, new portfolio is added instead of updating existing portfolio
- ❑ Integration will not look for existing bib records
 - ✓ If portfolio does not exist in the collection, it will activate portfolio from CZ along with the bib record
- ❑ The technical PO Lines are only associated with portfolios and not to the bib record



Further enhancements to come

- ✓ ExLibris working on developing the capability to run integration daily
- ✓ Job report will be improved including details on deleted titles
- ✓ Subscription titles will be added
- ✓ Purchase model will be indicated at the portfolio level
- ✓ Discontinue creation of technical PO Lines for OWNED titles
- ✓ Delivery target date is early 2020
- ✓ We will get early access for testing and feedback

Ideal situation – Setup & Forget





Resources on Upload Electronic Holdings from ProQuest Ebook Central

- ✓ [Webinar](#)
- ✓ [Product Documentation](#)

Acknowledgements

Kerrie Goldspring, Library Officer, Acquisitions

Jill English, Library Officer, Acquisitions

Janine Friedrich, Librarian

Phillipa Barlow, Team Manager Cataloguing & Metadata

Andrew Press, Team Manager eResources & Acquisitions

Dana Moshkovits, Director of Product Management, ExLibris

Amanda Norton, ProQuest

Alma Community



Charles Sturt
University

Thank you

Roshan Thapa PhD, GradDipInfoStud CSturt, BForSc(Hons) Melb
Coordinator, Discovery Services & Fulfilment
Library | Charles Sturt University
Leeds Parade | Orange NSW | Australia
T: +61 2 6365 7789 | E: rthapa@csu.edu.au
Certified Administrator: Alma, Primo VE & Primo