
Which electronic portfolio values are overwritten by auto-holdings jobs?

Question

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Answer

The upload electronic holdings job in Alma processes a KBART file from various vendors and updates holdings based on the data in the file. Certain fields in the Alma portfolios are overwritten by this process, while others remain unchanged.

Fields That Are Overwritten: The following fields are updated when values are present in the KBART file:

TITLE
AUTHOR
EMBARGO
PUBLISHER
PUBLICATION_DATE_YEAR
PUBLICATION_DATE_MONTH
PUBLICATION_DATE_OPERATOR

Additionally, the following coverage-related fields are overwritten when data is provided:

FROM_ISSUE, TO_ISSUE
FROM_VOLUME, TO_VOLUME
FROM_YEAR, TO_YEAR

These fields are generally associated with the coverage of the electronic holdings and will be overwritten by the values found in the vendor's KBART file.

Fields That Are Not Overwritten (Identifiers): The following fields are used for identification and retrieval purposes but are not overwritten:

ISSN
ISBN
URL
BKEY

Additional Vendor-Specific Fields:

ProQuest Ebook Central does not use a KBART file. It has its unique handling process.

Public Access Model – This field is specific to ProQuest Ebook Central and reflects the access model for the title. When left empty a default value - "UA" (Unlimited Access) will be written.

PURCHASE_MODEL – This field is relevant only for JSTOR and ProQuest Ebook Central. If an empty value is provided by the vendor, the PURCHASE_MODEL will be deleted entirely.

Assumptions:

If a value is included in the KBART file, the existing value will be updated unless an empty value (such as for PURCHASE_MODEL) is provided, in which case the value will be removed.

Coverage information such as FROM_ISSUE, TO_ISSUE, FROM_VOLUME, TO_VOLUME, FROM_YEAR, TO_YEAR will overwrite existing coverage details.

Vendor-specific values, like Public Access Model, will only be updated for ProQuest Ebook Central.

Conclusion:

To summarize, the values that are overwritten by the upload electronic holdings job are primarily related to publication details (TITLE, AUTHOR, PUBLISHER, etc.), coverage information (FROM_ISSUE, TO_ISSUE, etc.), and certain vendor-specific values. Fields like ISSN, ISBN, URL, and BKEY are used for identification and retrieval purposes but are not overwritten by the upload job. Additionally, fields like PURCHASE_MODEL can be removed if an empty value is provided.

Other data that is related to the portfolio (such as PO lines, access type, and notes) will not be affected by the job and will be kept regardless of the portfolio activation status that may be changed by the job.

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