Holdings Management - Searching for Titles and Packages by Vendor

Administrators can use Holdings Management in EBSCOadmin to search for packages and titles by vendor.

• Searching for Vendors
• Adding Packages from the Vendor Details screen
• Adding Titles from the Vendor Details screen

Searching for Vendors

To search for packages and titles by vendor:

From the Vendors Detail screen, you can:

1. Click the Vendors sub-tab on the Holdings Management screen.
2. Enter a vendor name in the Find field and click Search.
   
   A result list of vendors related to your search terms is displayed.
3. Click the vendor name for which you would like to view details.
4. Select a proxy from the Proxy Server drop-down menu.
5. Enter a Vendor Level token in the field provided.

   Note: Some vendors may require additional information (tokens) such as site IDs, account numbers, etc., to enable linking.
6. Click Save.

Adding Packages from the Vendor Details screen

On the package Details tab

1. Click the Packages tab on the Vendor detail screen.
2. Enter your search terms in the Find field and click Search.
A result list of packages related to your terms is displayed.

3. Limit or sort your results using the drop-down menus at the top of the screen.
   ◦ **Show** - Selected and Not Selected, Selected, or Not Selected
   ◦ **Limit To** - All, Abstract and Index, Aggregated Full Text, E-Book, E-Journal, Online Reference, Print, or Unknown
   ◦ **Sort** - Relevance or Package

4. In the **Current Holdings** column for a package, click the button to:
   ◦ **Remove Entire Package** from your holdings.
   ◦ **Select Entire Package** to add it to your holdings.

**OR**

5. Click the package name to view the detail screen for the title within that package.

6. Under Current Holdings, click the button to:
   ◦ **Remove Entire Package** from your holdings.
   ◦ **Select Entire Package** to add it to your holdings.

7. Check the box for **Hide on Publication Finder** to prevent the package from displaying to end users in Publication Finder.

8. If desired, select a proxy from the **Proxy Server** drop-down menu.

9. Enter a **Custom Coverage** date range for the package.

   **Note:** You can add multiple coverage dates by clicking the **Plus** button to add additional date range fields.

10. Select **Yes** to **Allow EBSCO to Add New Titles** or select **No** if you would prefer to manage your titles manually in Holdings Management.

11. Enter **Package Level** and **Vendor Level** tokens in the fields provided.

   **Note:** Some vendors may require additional information (tokens) such as site IDs, account numbers, etc., to enable linking.

12. Click **Save**.

**Adding Titles from the Vendor Details screen**

1. Click the **Packages** tab on the Vendor detail screen.
2. Click on a Package name to view the details for that package.

3. Click the Titles tab on the Package detail screen to view all titles within the package.

4. Enter your search terms in the Find field and select to search by Title Name, Publisher, ISSN/ISBN, or Subject from the drop-down menu and click Search.

   **Note:** As you enter terms, the responsive autocomplete displays titles matching the terms you enter. Click a title in the list to view results for that title.

5. Limit or sort your results using the drop-down menus at the top of the screen.
   - **Show** - Selected and Not Selected, Selected, or Not Selected
   - **Limit To** - All, Abstract and Index, Aggregated Full Text, E-Book, E-Journal, Online Reference, Print, or Unknown
   - **Sort** - Relevance or Package

6. In the Current Holdings column for a title, click the button to:
   - **Remove** the selected title or package from your holdings.
   - **Select** the title or package to add it to your holdings.

   **OR**

7. Click a title to view the title detail screen.

8. Click Add Title to Custom Package to add the title to a new custom package or one you have previously created.

9. Under Current Holdings, click the button to:
   - **Remove** the selected title or package from your holdings.
   - **Select** the title or package to add it to your holdings.

10. Check the box for Hide on Publication Finder to prevent the title from displaying to end users in Publication Finder.

11. If desired, select a proxy from the Proxy Server drop-down menu.

12. Select either Managed Coverage or create a Custom Coverage for your title.

   **Note:** You can add multiple coverage dates by clicking the Plus button to add additional date range fields.

13. Select the coverage to display on Publication Finder: Choose either the date range or create a custom Coverage Statement.

14. Add a Custom Embargo. Enter a number in the field provided and select Days, Weeks, Months, or Years from the drop-down menu.

15. Click Save.