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**.