

# Coverage Loads Manual

## Contents

Section 0: Notes for other libraries.....	2
Section 1: Downloading and converting the ssjreport .....	2
Section 2: Creating the required files for loading .....	3
Section 3: Checking the Providers in the Conversion Rules.....	4
Section 4: Loading Instructions .....	5
Section 5: Deleting Records .....	6
Section 6: What to expect in the reports.....	7
Section 7: Fixing Problems .....	7
Section 8: Considerations for changes in Serials Solutions or the ERM .....	8
When a new database is “Subscribed” in Serials Solutions.....	8
When a database is changed to “Not Tracked” in Serials Solutions.....	8
When a database is swapped for another in Serials Solutions.....	9
Determining the existing Custom Database Names .....	9
Changing an existing Resource ID in the ERM .....	9
Section 9: Updating the Coverage Spreadsheet Conversion Rules.....	9
Updating Providers .....	9
Updating Heading Conversions.....	10
Updating Custom Dates .....	10
Section 10: Generating brand new providers for the Coverage Spreadsheet Conversion Rules .....	10
Section 11: File Retention .....	11
Section 12: When things go really sideways.....	12
Skipping a load .....	12
Starting fresh.....	12

## Section 0: Notes for other libraries

- SerSol is used as shorthand for Serials Solutions.
- We worked with Serials Solutions on the report setup; specifically, we ensured the SSJ/SSIB number was added to the report and included in the supplied bibs so we can use it as a matchpoint.
- We enter a Custom Database Name for each database in Serials Solutions, as this overrides any database name changes SerSol may implement.
- We add a “Public Note” Column (Section 1, steps 10-13) because it improves the display in the OPAC:

**Title** Journal of poverty [electronic resource].

**Publication Info** Binghamton, N.Y. : Haworth Press

**Information from the Public Note field** [Connect to the Online resource](#) [Permanent Link](#)

Connect to this journal in the following online resource(s):

<a href="#">Taylor &amp; Francis Library SSH</a>	01 Jan. 1997-	<a href="#">Terms &amp; Conditions of Use</a>
<a href="#">SocINDEX</a>	01 Mar. 2000 - 22 Oct. 2014	<a href="#">Terms &amp; Conditions of Use</a>

- The saved searches referenced are:
  - ERM Coverage SerSol Bibs: store record type B

Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGRAPHIC	MARC Tag 003	has	wases	
2	AND	(	BIBLIOGRAPHIC	BIB LVL	equal to	s
3	OR	BIBLIOGRAPHIC	BIB LVL	equal to	i	)

- ERM Coverage orphan SerSol bibs: store record type B

Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGRAPHIC	MARC Tag 003	has	wases	
2	AND	(	BIBLIOGRAPHIC	BIB LVL	equal to	s
3	OR	BIBLIOGRAPHIC	BIB LVL	equal to	i	)
4	AND	BIBLIOGRAPHIC	LINKED REC	not exist to	CHECKIN	

- ERM Coverage empty checkins: store record type C

Term	Operator	Type	Field	Condition	Value A	Value B
1		CHECKIN	Resource ID	not equal to		
2	AND	CHECKIN	MARC Tag 856	equal to		

## Section 1: Downloading and converting the ssjreport

1. In the Coverage Loads folder on the shared drive (in the file path \Acquisitions Dept\ERM\CoverageLoads), enter the SSJReports folder. Create a new folder with the date (YY.MM.DD).
2. Log in to Serials Solutions. Navigate to Data on Demand (under Business Intelligence Tools). Download the report titled “ssjreport.zip” that was run on the 10th of the month. Open the .zip file and locate the ssjreport. Move this report without opening it to the folder you just created.
3. Open Excel.
4. Open the Data tab.
5. In the “Get External Data” section at the top left, click “From Text”.

6. Navigate to the shared drive, find the SSJ report you downloaded, and click "Import."
7. The Import Wizard will open. Choose the following options:
  - a. Step 1:  
Data Type: Delimited  
Start at Row: 1  
File Origin: 65001 Unicode (UTF-8)  
Click "Next"
  - b. Step 2:  
Delimiter: Comma  
Text Qualifier: "  
Click "Next"
  - c. Step 3:  
Select all the columns. Change the Data Format to Text.  
Click "Finish"
8. A dialog box will pop up: "Put the data in:" Choose Existing Worksheet =\$\$\$1 Click "OK"
9. Check the column headers. They should match: *Id*; *Type*; *Title*; *ISSN*; *eISSN*; *ISBN10*; *ISBN13*; *StartDate*; *EndDate*; *PublicationDate*; *Resource*; *Subject*; *URL*; *Author*; *Provider*; *DatabaseCode*; *PublisherName*. **Make sure the italicized headers are properly mapped according to the most recent Conversion Rules document on the G drive - see Section 9.**
10. Insert a new column between Resource and Subject.
11. Select all of the Resource column. Copy this.
12. Paste this in the new blank column.
13. Rename the first cell of the new column to Public Note.
14. Save the file. File name: [Month]-Original; Save as type: Excel Workbook.
15. **Keep this file open.**

## Section 2: Creating the required files for loading

At the end of this process, you will have the following files:

- ssjreport\_journal.csv – Original Serials Solutions report
- [Month]-Original.xlsx – the Excel file. This is needed so you can recreate any needed files without losing the UTF characters (see note<sup>1</sup> below).
- [Month]-Bigs.csv – Our two biggest collections.
- [Month]-Leftovers.csv – Everything left after creating the other csv file.
- Any further collections to be loaded separately.

The files are created in this order:

- Original

---

<sup>1</sup> NOTE: If any of the csv files are entered, in any way, and saved, the UTF characters will be lost. To edit or recreate any files, first regenerate them from the [Month]-Original.xlsx file. Do not save any changes to the [Month]-Original file.

- Bigs - limit Providers column to EBSCOhost and LexisNexis; then limit Resource column to remove EBSCO EJS (keep everything else).
- Leftovers - everything left, without limiters

**Create each file:**

1. Select all of the cells in the [Month]-Original file.
2. Copy the selected cells.
3. Open a new Excel workbook.
4. Paste the copied cells into the new workbook.
5. Select Row 1. On the Data ribbon, click "Filter."
6. Use the filter for the appropriate column to apply the needed limits.
7. Select all the rows, including Row 1, using your mouse to highlight the cells (do not use the "Select All" button between the Row and Column numbers at the top left).
8. Copy the selection.
9. Open a new Excel workbook.
10. Paste the copied cells into the new workbook.
11. Use Save As to save the file. File name: [Month]-[Designation]; Save as type: CSV (Comma Delimited).
12. Click "OK" for the first pop-up, and "Yes" for the second.
13. Close the workbook that was just saved. A dialog will pop up, prompting you to save. Click "Don't Save."
14. Return to the previous workbook with the highlighted entries. Unselect the highlighted cells, and re-select all except Row 1 (the headers).
15. With the cells selected, right click and choose "Delete Row." A dialog may pop up: "Delete entire sheet row?" Choose "Yes." NOTE: Do not just hit the Delete key on your keyboard, as doing so will leave the empty rows in the spreadsheet.
16. Double check: you should have two spreadsheets open ([Month]-Original, and one currently showing blank rows below row 1).
17. Remove all limits.
18. Repeat steps 6 through 17 to create the remaining files.

If for any reason, a new file breakdown is needed: It is extremely important that all of the SerSol databases that map to a single resource record are loaded in the same file; loading them separately causes titles from previous loads to be included in the Titles Not In File report and deletion. Refer to the conversion rules to determine which databases this applies to; it may be easiest to create one file with ALL the 'overlap' databases, and separate the remaining titles into the needed files.

### **Section 3: Checking the Providers in the Conversion Rules**

This must be done before each load, to catch any Serials Solutions changes that are not reflected in the Conversion Rules.

1. Open the most recent Serials Solutions SSJ report.

2. Copy the entire Resource column.
3. Open a new spreadsheet and paste the Resource column.
4. Under the Data tab, use Remove Duplicates.
5. Remove the column header (that says "Resources") and sort the de-duped list alphabetically.
6. Print this list (copy and paste it into Word and change the page layout to two columns to save paper) or keep it up on the screen.
7. Open the most recent Conversion Rules document from the shared drive.
8. Ensure that every Resource from Serials Solutions is correctly represented in the Providers section of the Conversion Rules. Check for spelling, capitalization, punctuation, and spaces.
9. In Sierra, run a Create List to gather all the active resource records.
10. Export the Resource Name and Resource ID fields.
11. Sort the list alphabetically by Resource ID.
12. Print the list of Resource IDs (copy and paste it into Word and change the page layout to two columns to save paper) or keep it up on the screen.
13. Ensure that every Resource ID from Sierra is correctly represented in the Providers section of the Conversion Rules. Check for spelling, capitalization, punctuation, and spaces.

#### **Section 4: Loading Instructions**

1. Ensure the Serials Solutions MARC files have been loaded for the month - do not load coverage until after the MARC updates are complete.
2. In Sierra, open Create Lists. Using one of the 125,000-record lists, gather all Serials Solutions bibs. Use Saved Query "ERM Coverage SerSol bibs." If this is NOT the first list created (ie., if you are creating this list after a load, prior to a subsequent load), add the name of the last loaded file in the create list name (e.g. MS ALL SerSol Bibs after Sep-JSTOR).
3. In Sierra, open Coverage Load.
4. Select the file you want to load. A message will pop up – click "Yes" to preprocess the file.
5. Beside Load Catalog, change the drop down menu to "Review" and find the list of all SerSol bibs created in step 2.
6. Beside Load Coverage, stick with the default options: ISSN and Title. Make sure the box next to "Mark as Active" is checked.
7. In the preprocessed data, check that the columns all look good, and that the data seems to be correct. Blanks in the following columns are an indicator that something is wrong: Altlookup; Title; Provider; Public\_Note; URL. The remaining columns (ISSN; EISSN; StartDate; EndDate) may include blanks.
8. Click Submit. If you are prompted for a bib template, ensure that the ermbib template is used. If you are prompted for a checkin template, ensure that the ermhold template is used.
9. Monitor the Results tab. Some files take a long time (over an hour), others load in just a few minutes.

10. When the Results tab indicates that the Load Catalog is complete, create a folder in the FILE PATH\Acquisitions Dept\ERM\CoverageLoads\CompletionReports folder with today's date (YY.MM.DD).
11. Save each report in the created folder. If a report can be expanded (e.g. the Titles not in File report), expand it before saving it. The naming scheme is [File]-[Report].txt, e.g. BigColl-Catalog.txt, BigColl-Coverage.txt, BigColl-Titles.txt, BigColl-Resources.txt, etc.
12. In the Titles not in File tab, make a mental note of the number of titles.
  - a. Select all titles and choose "Delete Selected."
  - b. In Create Lists, choose a list bigger than the number of entries in the "Titles not in File" tab.
  - c. Click "Copy"
  - d. Scroll down to find "Delete candidates from the last coverage load." Select this one.
  - e. There will be a pop-up: "Do you want to remove the file being copied from" – click Yes.
  - f. Rename the list "[Initials] [Month] SerSol Delete Candidates [File]", e.g. MS Sep SerSol Delete Candidates AllButJP.
13. REPEAT steps 1 through 12 for each coverage file.
14. If there were any changes to the Conversion Rules since the last load (e.g. we turn on a new database; the mapping for a database is modified; etc.), check the resource and/or bib records in the OPAC or Sierra to ensure that the checkins linked to the resource records correctly after all the coverage files have been loaded.
15. After all the loads are done, empty the All SerSol Bibs create list that was created in step 2.
16. Update the files on the shared drive as per the [retention schedule in Section 11](#).
17. Check the Resources reports to ensure that no resource appears in all reports; if so, that resource is no longer active and [should be deleted](#).

## Section 5: Deleting Records

1. After all the loads are complete, review the Delete Candidates lists. If there are a manageable number of records, check and delete each checkin individually. If there is a large number, it may have to wait until ILL runs the "dbermholdingsync" utility. Only delete checkins that have no 863/856 fields.
2. Ask the Site Coordinator to contact ILL and have them run the "dbermholdingsync" utility.
3. After the utility has been run, choose an empty 10,000-record Create List. Click "Search", then "Retrieve Saved Query". Choose the search "ERM Coverage empty checkins". Name the list "DELETE CHECKINS [Month] SerSol Empty Checkins".
4. If a small number of checkins are found, delete them one by one. If it is a large number, ask the Cataloguing Librarian to delete ONLY THE CHECKINS in this file.
5. Choose an empty 10,000-record Create List. Click "Search", then "Retrieve Saved Query". Choose the search "MS SerSol orphan serials bibs". Name the list "DELETE [Month] SerSol orphan bibs".
6. Ask the Cataloguing Librarian to delete the bibs in this file.

## Section 6: What to expect in the reports

### Catalog Updates

The following Result Messages are normal:

“Multiple Title ([Title]) matches”

Until Load Catalog matches on ONLY the AltLookup, there is nothing we can do about these.

“c[number] found: as linked to b[number]”

A previously-created checkin was found

“ok: b[number], c[number] created”

It did not find a bib, so it created one, then created a checkin

“ok: c[number] created for b[number]”

It found a bib, but no checkin for that resource, so it created a checkin

Any other messages should be investigated.

### Coverage Updates

The following Result Messages are normal:

“Insert Successful”

“Update Successful”

Any other messages should be investigated.

### Titles not in file

This report contains a list of titles that have had at least one 863/856 pair removed from the checkin, organized by resource.

### Resources not updated

This report contains a list of resources that were not updated with the last load.

## Section 7: Fixing Problems

### Problems identified by the Catalog Updates Report

“Multiple AltLookups”

We have more than one Serials Solutions bib with matching 001s. Consult with Cataloguing Librarian.

“putRecordOnServer adding/changing b[number] [gibberish coding]: bibtemp fatal error #386481952”

There is a special character in the journal title. Check the bib, check what the title is supposed to be, and check if the title is showing correctly in Serials Solutions - if it isn't, contact SerSol to get the title updated.

“\*createWorkRecViaTemplate: addNewRecnum returned invalid record number c-1 (might exceed the acctunit record range”

We have run out of checkin record numbers. Consult with the Site Coordinator.

### **Other Problems**

Checkins not linking to resource record

Check the resource record in the OPAC - if the checkins are not linking, no titles will display below the license record. To fix, run the following create list: store: Checkin; Checkin Resource ID = [Resource ID affected]. In the Resource record, under Related Holdings on the summary screen, click “Add List of Related Holdings,” select the list, and click “Add.”

Forgot to add Public Note column before loading

1. Open [Month]-Original.xlsx
2. Add Public Note column like usual
3. Save the modified file as a .csv
4. Select and preprocess the file in Sierra
5. Uncheck the box next to “Load Catalog”; ensure the box next to “Load Coverage” stays checked
6. Load and check results

## **Section 8: Considerations for changes in Serials Solutions or the ERM**

*When a new database is “Subscribed” in Serials Solutions*

1. Create the resource record, and decide on the Resource ID.
2. Subscribe to the database in Serials Solutions, and decide on the Custom Database Name. Leave out any unnecessary or confusing information, such as: consortium designation; title list year (unless it is a static list that is never updated, such as a purchase of backfiles in 2012); or, “with Full Text.”
3. Map the Serials Solutions Custom Database Name to the Resource ID in the Conversion Rules.
4. Add a tickler to the resource record to check that the checkin records linked to the resource correctly in the next load.
5. Note the number of titles in the collection - if it is a very large collection, we may need more checkin records. Check with the site coordinator.

*When a database is changed to “Not Tracked” in Serials Solutions*

1. Ensure there is a resource advisory for the corresponding resource record. The resource advisory must have the resource name in it (e.g. Erudit will be cancelled on August 31, 2014. [Insert standard contact clause].).
2. Add a tickler to the resource record to perform the following actions after the next load: remove the database from the Conversion Rules; delete the coverage in Coverage Edit; remove any empty checkins; and, suppress the resource record.

### *When a database is swapped for another in Serials Solutions*

1. Open existing (old) Serials Solutions database record in one tab/window, and the new database in another.
2. Old database: click "Edit".
3. New database: click "Edit", change Status to "Subscribed", and click "Save". Click "Edit" again.
4. Copy the Custom Database Name and Public All Titles Note from the old database into the new database. Ensure "Display" is checked for the Public All Titles Note.
5. New database: click "Save".
6. Old database: change Status to "Not Tracked" and click "Save".

### *Determining the existing Custom Database Names*

1. Log in to Serials Solutions.
2. Under Business Intelligence Tools, click "Management Reports."
3. Click "Request Report."
4. Retrieve and open the report once it is complete.
5. The Custom Database Name column lists the custom names for all of our resources.

### *Changing an existing Resource ID in the ERM*

1. Locate the resource in Coverage Edit and update the resource name.
2. Update the Resource ID in the resource record.
3. Update the Resource ID in the checkins (create a list: STORE: Checkin; Checkin - Resource ID - equals - [previous Resource ID]. Ask the Cataloguing Librarian or Site Coordinator to update them using Global Edit.)
4. Update the ConversionRulesSetup spreadsheet.
5. Update the conversion rules.

## **Section 9: Updating the Coverage Spreadsheet Conversion Rules**

1. Open the most recent Conversion Rules from the shared drive.
2. Use Save As to immediately re-save the document with "NEW" at the beginning and the current date at the end of the file name.
3. Open the Conversion Rules folder on the shared drive, and remove the "NEW" from the file name of the previous conversion rules. See [Section 11: File Retention](#) for a guide to handling prior conversion rules.
4. After the document is updated (see instructions below), note the changes, the date, and your initials at the top of the document and save it. Select the entire document and copy it.
5. In Sierra, open the Coverage Spreadsheet Conversion Rules and select all. Delete the current contents, and paste in the new rules.
6. Click Save.

### *Updating Providers*

1. The format for the providers section of the conversion rules is provider|SerSol Custom Name |Associated ResourceID and the providers are listed alphabetically by the SerSol Custom Name.

2. Replace “SerSol Custom Name” with the custom database name - copy it from Serials Solutions and paste it here. Note there are no spaces before it and two spaces after it.
3. Replace “Associated ResourceID” with the Resource ID from the resource record - copy it from Sierra and paste it here. Note there are no spaces before it and a hard return after it.
4. Double check the spelling, capitalization, spacing, and punctuation of both the SerSol Custom Name and the Associated ResourceID - any mistake in either will cause problems.

### *Updating Heading Conversions*

1. Review the column headers in the ssj report from Serials Solutions. Identify the column header you want to map, and determine which field it needs to map to.
2. The format for the heading conversion is fields|SerSol Header |COVERAGE\_FIELD
3. Replace “SerSol Header” with the header from the sjj report - copy it from the report and paste it here. Note there are no spaces before it and two spaces after it.
4. Replace “COVERAGE\_FIELD” with the field the header should map to - copy it from an existing line in the conversion rules and paste it here. Note there are no spaces before it and a hard return after it.
5. Double check the spelling, capitalization, spacing, and punctuation of both the SerSol Header and the COVERAGE\_FIELD - any mistake in either will cause problems.
6. Add the new field to the list of fields to check in Section 1.

### *Updating Custom Dates*

1. Determine which new date is needed (compare the current list in the conversion rules to a deduped list from the ssj report). Numerical dates are automatically translated during a load; textual dates (eg. Fall 2013; 4 calendar years ago; May 1978; etc) must be added to the conversion rules.
2. The format for date conversions is date|SerSol Date |Numerical Date
3. Replace “SerSol Date” with the textual date from the ssj report. Case is important; “FALL” will not be recognized if the conversion rules only include entries for “Fall.”
4. Replace Numerical Date with the date to display, in yyyyymmdd format. This can be truncated, such as just entering a year, or a year and month, to display. For seasonal conversions, use the following guide to assign months: Spring = 03; Summer = 06; Fall = 09; Winter = 12.
5. Note that the conversion rule entries for “x calendar years ago” must be updated annually before the first load in January.

## **Section 10: Generating brand new providers for the Coverage Spreadsheet Conversion Rules**

1. Open a new spreadsheet. Enter the following information:
  - a. A1: provider| [No spaces after the pipe]
  - b. B1: [blank for Serials Solutions database name]
  - c. C1: | [Two spaces then a pipe]
  - d. D1: [blank for Resource ID]

- e. E1: A1&B1&C1&D1
2. Save this spreadsheet as NEW-ConversionMapping.xlsx
3. Get a list of the Custom Database names from Serials Solutions:
  - a. Log in to Serials Solutions.
  - b. Under Business Intelligence Tools, click “Management Reports.”
  - c. Click “Request Report.”
  - d. Retrieve and open the report once it is complete.
  - e. The Custom Database Name column lists the custom names for all of our resources. Copy this column, and paste it into the B column in the ConversionMapping spreadsheet.
4. In the ConversionMapping spreadsheet, for each Custom Database Name:
  - a. Determine which resource it will map to.
  - b. Open the resource record, and check the Resource ID field.
    - i. Does it exist and contain an appropriate Resource ID? If so, leave it.
    - ii. Does it exist and contain an inappropriate Resource ID? If so, update the Resource ID to something more accurate.
    - iii. Does the field not exist? If so, create the field and enter an appropriate Resource ID.
  - c. Copy the text of the Resource ID field into the corresponding cell in column D.
5. When each custom database name has been mapped to a Resource ID, autofill column E to the bottom.
6. Select all of column E, and copy it.
7. In column F, paste the values of column E. Do not perform a standard paste, or it will paste the formula instead of the displaying text.
8. Open the most recent copy of the Conversion Rules word document. Select the body of the Providers section (but not the header, which is a row of dashes, “#provider conversion,” and another row of dashes) and delete it.
9. Copy column F, and paste it below the providers header in the Conversion Rules document.
10. At the top of the Conversion Rules document, note what was updated, e.g. # UPDATED providers 7Oct14/ms NOTE: the # character tells Sierra to ignore that line, so it must go in front of every line that is not necessary for the program to run.
11. Use Save As to save a new copy of the Conversion Rules; include the date in the file name.
12. Open the Coverage Spreadsheet Conversion Rules in Sierra. Select everything, and delete it.
13. Copy the entirety of the Conversion Rules document, and paste it into the Coverage Spreadsheet Conversion Rules in Sierra. Click Save.

## Section 11: File Retention

**Completion reports** (in the file path \Acquisitions Dept\ERM\CoverageLoads\CompletionReports)

- If there is a problem with the load, keep the completion reports for that load for a full calendar year. Enter the problem details in the Problem Log for that year. Keep one calendar year plus current.
- If there are no problems, keep two months plus current.

**Conversion Rules** (in the file path \Acquisitions Dept\ERM\CoverageLoads\ConversionRules)

- In the main folder, keep the original file and the current files since the last load.
- Move older files to a calendar year folder. Keep one calendar year plus current.

**SSJ Reports** (in the file path \Acquisitions Dept\ERM\CoverageLoads\SSJReports)

- Keep two months plus current.

## Section 12: When things go really sideways

### *Skipping a load*

Bibs: Bib loads cannot be skipped, as they are “update” driven. These loads must be done in order every time. Coverage can only be loaded after a bib load for the corresponding month.

Coverage: Each ssj report contains the entirety of our holdings at the moment it is generated. As such, it is possible to skip a load if needed, with the following considerations:

- Skipping one load means that the data in the checkin records is actually two months out of date
- Ensure the bib-level 856s are still available to the users

### *Starting fresh*

**This should only be attempted if a load has gone catastrophically wrong**, eg. the entire file was corrupted. Think VERY CAREFULLY before following the procedure below - can the problem be fixed by loading from an updated/uncorrupted file?

If there is no other conceivable fix aside from starting fresh:

1. Create a list in Sierra to gather all of the coverage-generated checkins. The easiest way will be: STORE: Checkin; Checkin - INT NOTE - HAS - CREATED FROM COVERAGE LOAD
2. Delete all of these checkins. It may be easiest to ask the Cataloguing Librarian or Site Coordinator to do so.
3. Create a list in Sierra to gather all of the coverage-generated bibs. The easiest way will be: STORE: Bib; Bib - MARC Tag 911 - has - CREATED FROM COVERAGE LOAD
4. Delete all of these bibs. It may be easiest to ask the Cataloguing Librarian or Site Coordinator to do so.
5. Choose “Coverage Edit” from the Function list in Sierra. Select all of the resources in the Coverage Database, and click “Delete Resource.” Follow any prompts that come up.

6. Ask the Site Coordinator to ensure that we have enough checkin record numbers to ensure a reload will complete successfully.
7. Load like normal. There should be no "Titles Not In File"; everything else should occur like a standard load.