# Instructions for use and maintenance

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Using our solution to generate an up-to-date version of the R&P journal tool

1. Ensure that the latest CAUL Read & Publish Agreements, ERA Submission Journal List, and Scimago Journal Rankings data files are in the `/CAUL`, `/ERA`, and `/SCIMAGOJR` folders, respectively.
   - The most recently modified non-hidden file with a valid filename in each folder will be used.
   - The CAUL and ERA files should be in the .xlsx file format; the SCIMAGOJR file should be a .csv.

2. Open `Database v0.3.2.xlsm` in Excel.

3. From the Control Panel worksheet, click the 'Generate New Document' button.
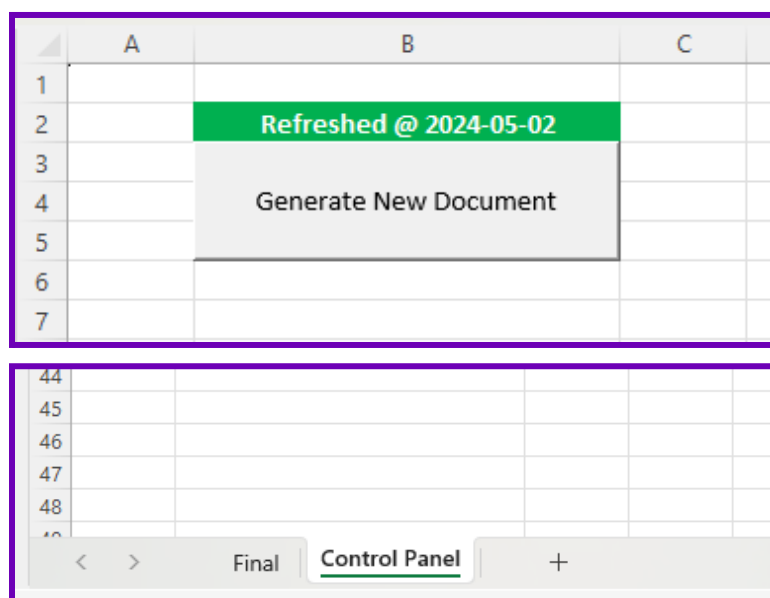
- ○ The status bar at the top of the button will turn red while the new file is being generated.
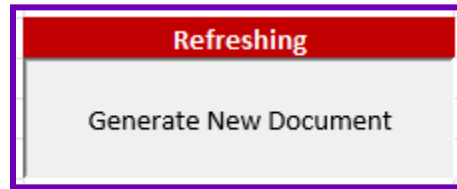

- ○ When generation is complete, you will automatically be switched to the Final worksheet, which contains the generated data.

- ○ A new file containing only this worksheet, with a filename following the pattern `2024-04-25 Read and Publish Journal Tool - UNE.xlsx` (but with today's date at the beginning), will be created in the same directory and automatically opened.

4. Check that the contents of the newly-created file are correct. If so, it is ready to be uploaded to the UNE website.

Troubleshooting

- ● If the new file could not be created, make sure there is not a currently-open file with the same path and try again. (If you have already clicked Generate New Document today, the file will exist and will still be open if you did not manually close it.)
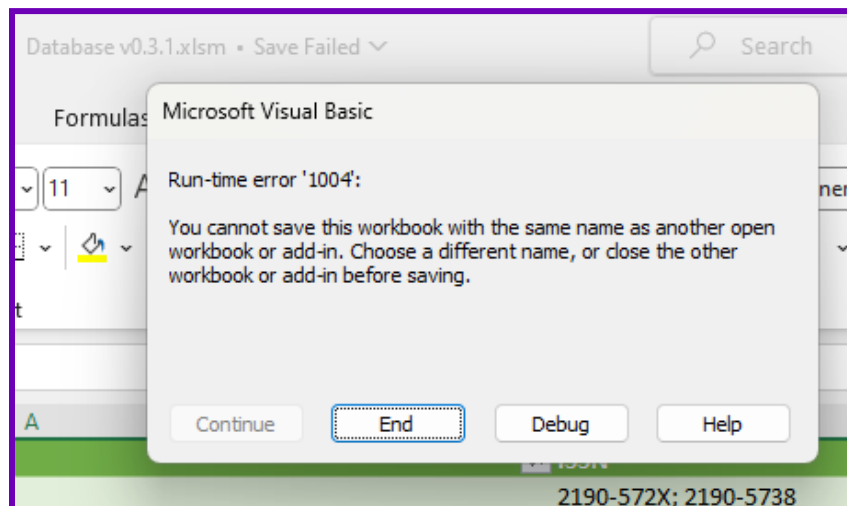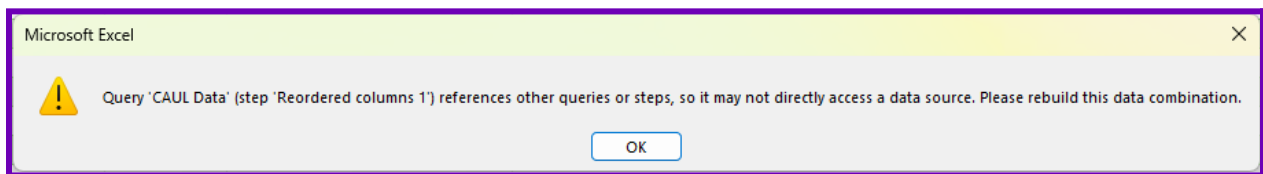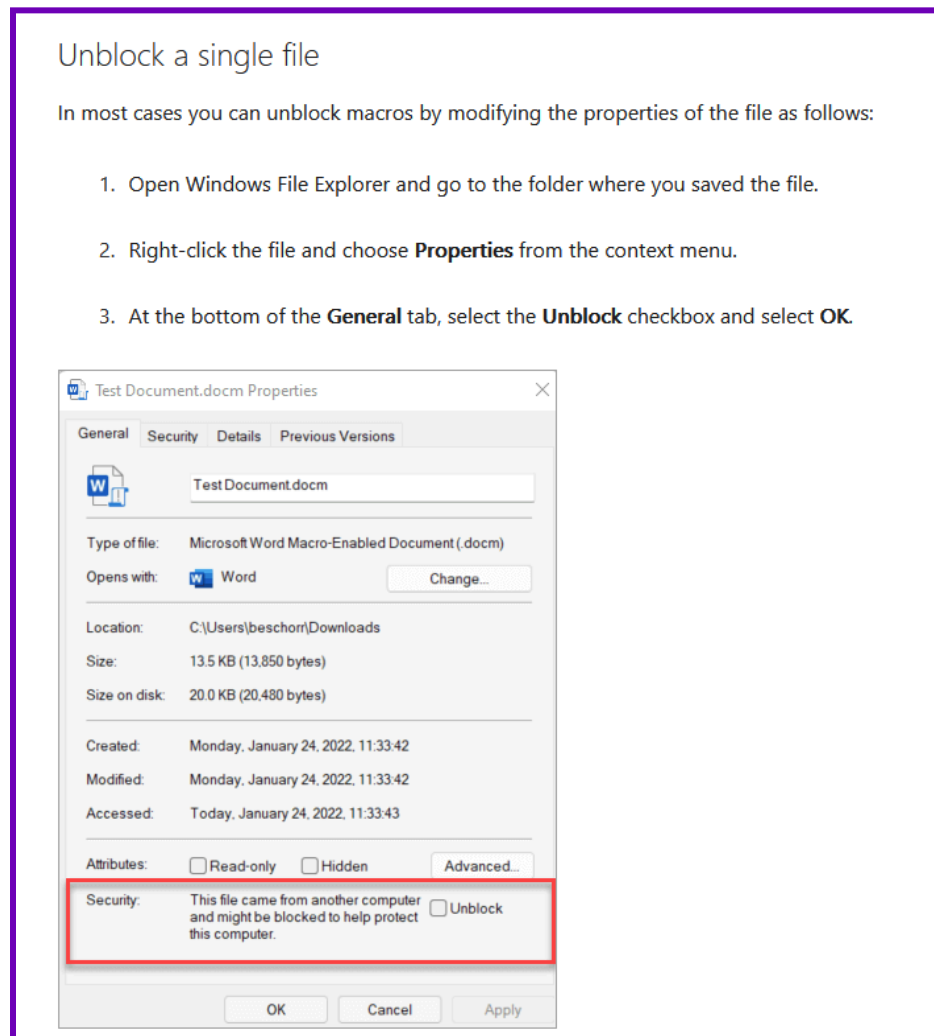
- If you see a warning message similar to the one pictured above, you may need to instruct Excel to ignore Privacy Level settings for this file. You can do this by opening the **Data** tab, clicking the **Get Data** icon, selecting **Query Options** from the dropdown menu, and clicking on **Privacy** under the 'Current Workbook' heading in the sidebar menu. From there you can select the option to 'Ignore the Privacy Levels and potentially improve performance'.
  - If this option is greyed out, you can change the setting globally by clicking on **Privacy** under the 'Global' heading in the sidebar menu and selecting 'Always ignore Privacy Level settings'. Be aware that this may create a security risk; you should not leave this setting on and open documents from untrusted sources.
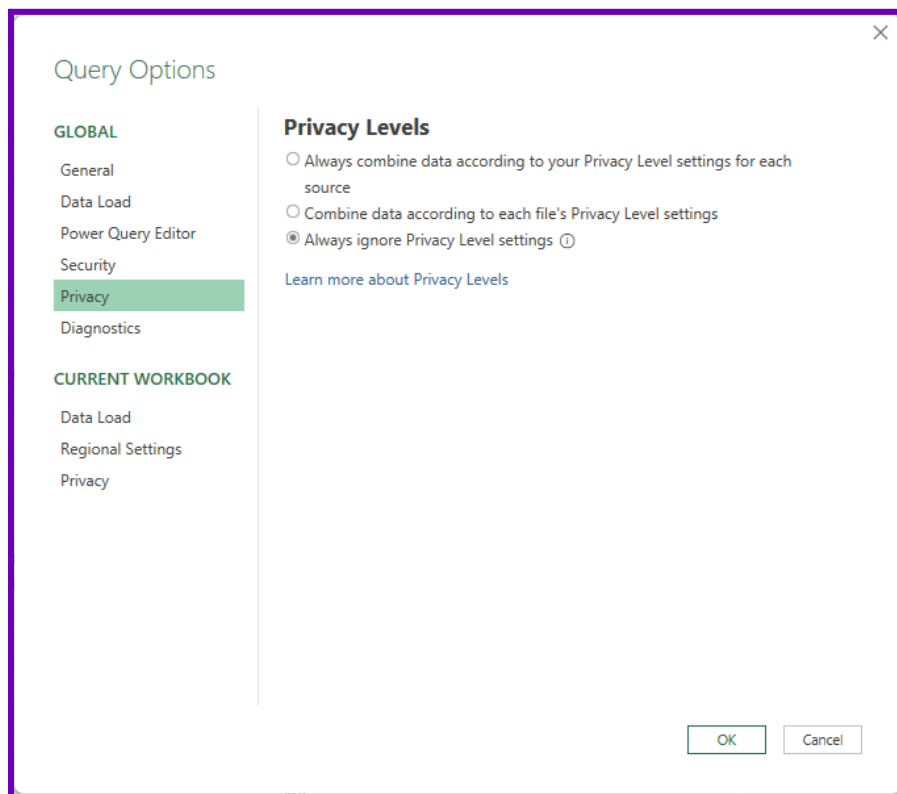
- If the 'Generate New Document' button does not work, you may need to [unblock the file](#), which you can do by following the instructions in the image below.

Unblock a single file

In most cases you can unblock macros by modifying the properties of the file as follows:

1. Open Windows File Explorer and go to the folder where you saved the file.

2. Right-click the file and choose **Properties** from the context menu.

3. At the bottom of the **General** tab, select the **Unblock** checkbox and select **OK**.

Test Document.docm Properties   ✕

| General | Security | Details | Previous Versions |

Test Document.docm

Type of file: Microsoft Word Macro-Enabled Document (.docm)

Opens with: Word   Change...

Location: C:\Users\beschorr\Downloads

Size: 13.5 KB (13,850 bytes)

Size on disk: 20.0 KB (20,480 bytes)

Created: Monday, January 24, 2022, 11:33:42

Modified: Monday, January 24, 2022, 11:33:42

Accessed: Today, January 24, 2022, 11:33:43

Attributes: ☐ Read-only   ☐ Hidden   Advanced...

Security: This file came from another computer and might be blocked to help protect this computer.   ☐ Unblock

OK   Cancel   Apply

- If the 'Generate New Document' button still does not work, you may need to change your macro security settings in Excel. You can do this by opening the **File** tab, clicking the **Options** button, selecting **Trust Center** in the sidebar menu, clicking the **Trust Center Settings** button, and selecting **Macro Settings** in the new sidebar menu.
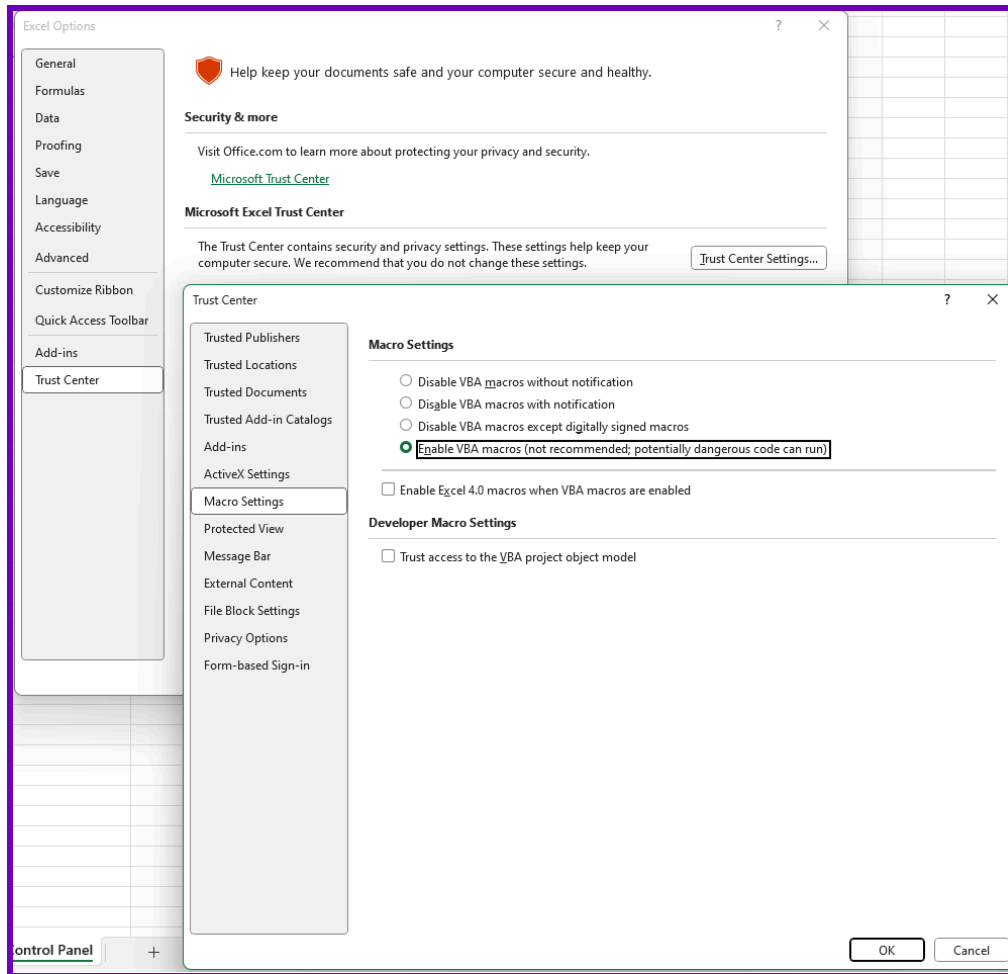
Editing Power Query code

If you are still having problems, the input data may have changed in a way that necessitates changes to the code we wrote to load, process, and merge the data.

To modify this code, select the **Final** worksheet in `Database v0.3.2.xlsm`, open the **Query** tab in the top menu bar, and click the **Edit** icon at the left of this tab. This will open the Power Query editor, from which you can view and modify the code.

The code is written in the Power Query M language, which is documented at https://learn.microsoft.com/en-us/powerquery-m/. The documentation for Power Query itself is available at https://learn.microsoft.com/en-us/power-query/. Commented copies of all our code, explaining the purpose of each step, are contained in the `documentation` folder included with our solution.