

# Electronic Journals

## HOW-TO GUIDE ON HOLDINGS UPDATES

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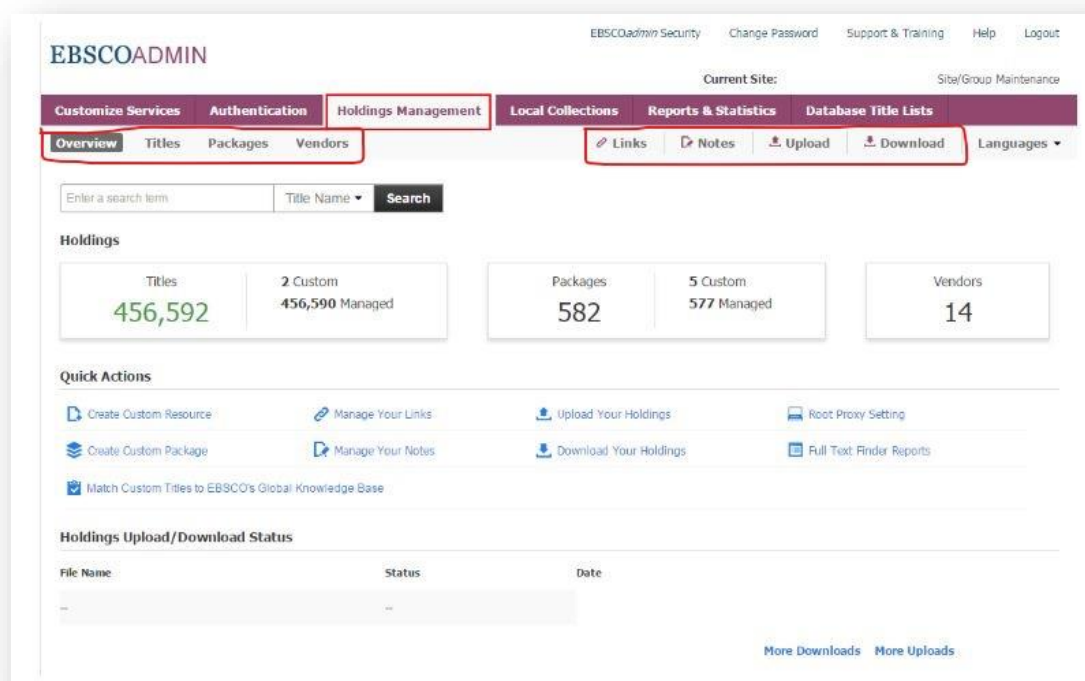
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# Introduction

## What is Holdings Management?

**Holdings Management (HM)** is a section of EBSCOadmin containing most of the tools for managing the library's holdings in regard to EDS. The changes that are made in HM will reflect in EDS, the EBSCO Discovery Service that brings together all of our collection content, content linking, and subject indexing so that our resources can be discoverable through OneSearch. EDS is sometimes referred to as OneSearch, which is the patron-facing discovery layer and search tool of EDS. Searching for titles, packages, and vendors in HM is made simple through a search function that allows you to search through our entire combined collection of content and resources, also called the knowledgebase. The links circled in red in the image of HM's landing page below are the primary links to the functions that will be used throughout this guide.



## Why Do We Perform Holdings Updates?

A holdings update is the verification that our content is not only complete and correct, but discoverable and accessible. Updates should be performed on new, current, and archival content that the library has subscribed to or purchased. Updates include:

- Identifying and activating current subscriptions
- Identifying and activating historic or backfile collections
- Making sure the titles and coverage dates are correct
- Confirming the URLs are resolving and authenticating properly
- Understanding why the HM package may not match a current vendor list (more information on this process in [Backfile and Archival Content](#))

## Holdings Update Procedure

This is the simplified procedure for current subscriptions; each of the steps are explained in more detail in the section linked next to the step.

1. Create the file structure and naming convention ([Organizing Files](#))
2. Obtain complete **vendor title lists** and **package title lists** ([Obtaining Title Lists](#))
3. Compare the vendor list and HM lists ([Comparing Title Lists](#))
4. Examine the comparisons made and identify matches and nonmatches ([Examining Comparisons](#))
  - a. Identify backfile and archival content ([Backfile and Archival Content](#))
5. Confirm links work and provide full-text access ([Checking Linking and Full-Text Access](#))

# Organizing Files

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Before you begin your downloads and comparisons, it's important to organize your files in order to keep track of the work you've done. Many of the files that we download and edit will be viewed at a later time. There are many different ways you could organize your files; one option is to create a main folder that is titled either with the package name you are performing an update on or with the vendor providing the content, and to create subfolders for downloads, uploads, vendor title lists, and edited workbooks. Alternatively, original worksheets can be added to a workbook then copied into a new sheet in that same workbook, which is then edited. The important part is keeping the original documents and developing a naming scheme that differentiates those items from edited ones.

# Obtaining Title Lists

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## **EBSCO Title Lists**

Journal packages are represented in HM by packages. As previously discussed, HM contains our collection content which includes journals licensed from vendors. EBSCO creates packages of content for us in HM, either on their own or from a request directly from us. There are two types of packages: complete packages, in which all of the content should be selected, and variable packages, in which some of the content can be selected while other content is not.

## **Downloading Title Lists from HM**

The easiest way to compare titles in HM packages with their access coverage dates, and ISSNs, and URLs is to download a title list. In HM, there is a “Download” link on the right side of the webpage; that link will show the webpage below. Click the radio button next to “Package name,” type keywords for the package names in the search box, select the exact package names from the box on the left, and choose the “Add” function so the package names appear in the box on the right. Once all of the packages that need to be downloaded are listed on the right, name the file with the package name(s) and the date, then click “Create File for Download.”

Contents ?

Resources

☒ Managed and Custom
 ☐ Managed
 ☐ Custom

Package Content Types

☒ All
 ☐ Aggregated Full Text
 ☐ Abstract and Index
 ☐ E-Book
 ☐ E-Journal
 ☐ Print

Package name

☒
 De Gruyter Online / ResearchNow 2019 (FLVC)  
 LWW Total Access Collection 2019 minus  
 Neurology  
 SAGE Knowledge Complete Collection of  
 Books, Reference and Navigator 2019  
 SAGE Premier 2019  
 Springer eBooks (Behavioral Science and  
 Psychology 2019)  
 Springer eBooks (Business and Management  
 2019)  
 Springer eBooks (Economics and Finance

Resource Types

☒ All
 ☐ Journal
 ☐ Newsletter
 ☐ Report
 ☐ Proceedings
 ☐ Web Site
 ☐ Newspaper
 ☐ Unspecified
 ☐ Book
 ☐ Book Series
 ☐ Database
 ☐ Thesis/Dissertation

File Name \*

Enter a descriptive name for your file. Example, managed-custom-allcontenttypes.

## Vendor Title Lists

The **vendor title list** is a complete list of all the titles in a package that FSU has either licensed from a vendor, subscribed to, or purchased as a perpetual access backfile. If a list isn't sent directly by a supervisor or other associate, it should be available in one of the locations below.

## CORAL

[CORAL](#) is an open source ERMS for storing information related to our e-resources. The licensing module stores licenses and the associated title lists for content we have purchased or subscribed to. Some records in the resource module for journal packages may also have title lists attached. For more information on using CORAL, check the CORAL guide located in SharePoint.

## Checking FLVC/FALSC

Florida Virtual Campus (FLVC/FALSC) licenses electronic resources on behalf of the Florida State University system. The e-licensing portal houses the license agreements

for FLVC-funded e-resources, as well those managed and negotiated by FLVC but paid for by participating institutions. Check the [FLVC/FALSC](#) portal to see if the title list is located there. The password and username can be found in the CORAL Organizations Module within the FLVC E-Licensing Portal organization entry.

## **SharePoint**

[SharePoint Online](#) is a cloud-based collaboration tool that makes it easy to share information. The Electronic Resources Department uses SharePoint to document FSU Library's e-resources collection and stored all title lists there before CORAL. Vendor title lists are in the "Serial Title Lists" and "Title Lists" folders. Archived packages may be in the folder "ERS Archive." Content purchased during FY 2019-2020 is in "ERS-19-20."

## **Licenses and Invoices**

The binders and file cabinets located against the back wall of Madison St. contain printed copies of our recent licenses and invoices. Sometimes these will contain a title list. Older licenses and invoices are kept in the serials librarian's office.

## **Contacting Vendors**

FSU may not have a title list, especially if it is a new subscription. CORAL contains vendor contacts in the organizations module. When emailing a vendor, be sure to include information about the licensed package such as the package name, invoice number, and renewal period.



# Comparing Title Lists

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Excel formulas can quickly see if the titles from both lists match and compare the metadata for each title in both lists. By having both the vendor and HM title lists in Excel spreadsheets, the formulas below can quickly and easily compare long title lists. Throughout this guide, Excel formulas will look **like this**, parts of Excel formulas that will change based on the worksheet will look *like this*, and keyboard shortcuts will look *like this*. More information about these formulas and shortcuts can be found in [Appendix A: Excel Formulas and Shortcuts](#).

## Preparing the Worksheets

1. Review both worksheets to ensure there are columns for titles, ISSNs (print and/or online), URLs, and other information.
2. Ensure that the data is contiguous—there are no empty columns between columns with information and there are no empty rows before the end of the title list.
3. Create copies of both title lists. You may want to format these lists as tables to ensure the title information remains properly sorted.
4. Add a column containing the KBIDs to the very end of the copy of the HM title list.
5. Note that both worksheets created in step three need to remain open for the comparisons detailed below.

## Comparing Print and Online ISSNs

1. In the copy of the vendor title list, create blank columns next to the ISSN column(s). Name the columns something like "Online ISSN Comparison" and "Print ISSN Comparison."
  - a. Sometimes only a print or online ISSN is given. If they are both provided, compare both; if only one is given, compare the given column against the corresponding column in the other list. Sometimes, the single column may need to be compared against both ISSN columns in the other list to determine what type of ISSN it is.
2. In the first cell of one of the blank columns, enter the formula `=VLOOKUP(lookup_value,table_array,1,0)`, then double click the fill handle.
  - a. To enter the *lookup\_value*, select the first cell in the ISSN column being compared to; to enter the *table\_array*, select the corresponding ISSN column in the HM title list.
  - b. Vendor title lists can have formatting issues with extra spaces and hyphens; the **TRIM** and **SUBSTITUTE** functions can clean ISSNs up.

- c. The fill handle is the box in the lower right corner of the active cell outline. Hovering over it turns the cursor icon into a skinny black cross; double-clicking at that point will auto-fill the formula in the active cells to where the other values end.
  - d. Please take a look at the formulas section of this manual for more information on all the formulas above.
3. With all of the cells with formulas in them still selected, move the cursor to the border of the selection so it turns into a four-way arrow. Right click, drag the selection out of place then back into its original position, then release the mouse. From the context menu that emerges, select “Copy Here as Values Only.”
  4. Use sorting and filtering to find cells with errors, (represented by “#N/A”), empty strings (blank cells), zero, and similar values in the comparison column. These values indicate either the ISSN didn’t match or there wasn’t an ISSN to match (the column was blank for that row) and will require further attention.
    - a. If a title can't be matched because of an error in the cell, compare the journal titles to confirm a match or nonmatch.
  5. If there’s another blank column, repeat steps two through four for the other ISSN column.

## Comparing Titles

For those titles that couldn’t be matched by ISSN, it may be possible to find a match by comparing titles. Since it is common for titles in vendor lists to be slightly different than lists in HM, matching by ISSN should be attempted first. Title matching uses the same process as comparing ISSNs with a slightly different formula.

1. Create a blank column next to the titles column and label it to identity that it is a comparison column.
2. In the first cell of the blank column, enter the formula:  
`=VLOOKUP(LEFT(text,num_chars)&"*",table_array,1,FALSE)`, then double click the fill handle.
  - a. To enter the *text*, select the first cell in the title column; to enter the *table\_array*, select the title column in the HM title list. Type in a number for *num\_chars* to have the formula return the first title with the same *num\_chars* number of characters from the HM title list.
  - b. The fill handle is the box in the lower right corner of the active cell outline. Hovering over it turns the cursor icon into a skinny black cross; double-clicking at that point will auto-fill the formula in the active cells to where the other values end.
  - c. Journal names starting the same way will return false positives; the first journal name with a given string of *num\_chars* length in the HM lit will be returned for as a match for all titles starting with that string. Split titles both starting with the name of the predecessor and the popularity of certain

serials naming conventions (e.g. The Journal of...) are common sources of mismatches.

- d. Please take a look at the formulas section of this manual for more information on all the formulas above.
3. With all of the cells with formulas in them still selected, move the cursor to the border of the selection so it turns into a four-way arrow. Right click, drag the selection out of place then back into its original position, then release the mouse. From the context menu that emerges, select "Copy Here as Values Only."
4. Use sorting and filtering to find cells with errors, (represented by "#N/A"), empty strings (blank cells), zero, and similar values in the comparison column. These values indicate either the title didn't match or a more serious problem and will require further attention, so fill all those cells with a certain color so they can be easily found later.
  - a. If a title can't be matched because of an error in the cell, search for the title in the list that it is being compared to. Using the **Ctrl + F** keyboard shortcut then entering in the title name is a quick way to do this.
  - b. Now confirm whether it is a match or nonmatch. See instructions for matches and nonmatches in the [Examining Comparisons](#) section.

## Comparing Coverage Dates

Within HM, default **managed coverage dates** are set by EBSCO for all resources.

**Custom coverage dates** are different dates set through editing a package or title in HM at the page location seen below or through a holdings upload. The coverage dates appear in EDS records as shown in the **coverage display**. The coverage dates are also shown in the downloaded list in the "coverage date" column.

**Coverage**

**Dates** ?

☒ **Managed Coverage**  
 02/01/1999 - Present

☐ **Custom Coverage**  
**Begin Date**  **End Date**

**Coverage Display** ?

☒ **Dates**  
 02/01/1999 - Present

**NOTE:** When you manually change a date in HM remember to **CLICK SAVE** at bottom of the web page.

The most common coverage for packages will be in the MM/DD/YY-Present date format. Spot check the vendor list coverage date with the downloaded list for dates that do not match this format. Take a closer look at these by making sure they match with the coverage dates in the vendor title list. If they match, continue with the workflow; if they don't match, confirm what dates we have access to by checking content on the journal's host site. Contact the vendor if we can't access dates that we should be able to. Read [Common Issue #2](#) below for more information about confirming correct dates.

1. For comparing many coverage dates at a time, the **=IF()** function can be used. It can only be used if the vendor list has provided a coverage date.
  - a. In the HM downloaded list, create a blank column next to the coverage date. If there are managed and custom coverage dates, then add columns next to both of these columns and make comparisons for both.
  - b. Copy and paste the coverage dates from the vendor title list next to the dates in the downloaded list. Make sure that all dates are in the date number format!
  - c. Begin typing the function **=IF(First Cell=Second Cell, "Yes", "No")**. **Visit the Formulas section for more information.**

- i. The "first cell" and "second cell" are the cells that are being compared. Here is an example: `=IF(A2=B2, "Yes", "No")`
  - i. After pressing enter, hover your mouse over the cell that has the function in it. Click and hold the small green square at the bottom right, dragging it to the bottom of the sheet. This pastes the IF formula into all blank cells in the column.
  - ii. If the result is "No" then coverage dates are not the same; if "Yes" then coverage dates are the same. Check the "No" dates by seeing what accessible dates are on the journal's host site. They should match the coverage dates in the vendor list, and if they do not, contact the vendor to gain access to the correct dates.
    1. It is possible that some additional dates are archival or backfile content. Visit [Backfile and Archival Content](#).
2. If you are changing a large number of coverage dates for a package at once, you will need to upload a new document into EBSCO with the mass changes. In this procedure, make sure the ONLY edited information are the changed dates. There can be no tables in the uploaded document. Once only the dates are changed, you can upload the HM document back into EBSCOadmin where changes will occur automatically.
  - a. Please carefully read EBSCO's HM support page [here](#).

### *Common issues and questions:*

1. What do you do if coverage dates aren't included in a vendor title list?
  - a. It's common that coverage dates won't be in the vendor title list. Use a title's URL to manually check access and confirm the correct dates are accessible. Create a custom coverage date if the managed coverage is not correct.
2. How do you know if the coverage date is "correct" if the vendor list doesn't provide coverage dates?
  - a. If it's the case that we have accessible dates for an entire journal, then it's not necessary to check coverage dates. Make sure links are working and all dates are actually accessible.
  - b. Check the vendor's portal for subscription information. Vendor portal login information is located in the CORAL Organization Module.
  - c. Check for package information on a vendor's website under sections like "Information for Librarians". Specific information about packages that we have licensed will sometimes be on a vendor's website. Every website is different, so browse carefully.
3. Is the custom coverage date in the title list not a real date (EX: 01/00/1900)?
  - a. This could be due to there not being a custom coverage date, meaning there's only a manual date that EBSCO set. Check the column Managed

Coverage Begin in the downloaded HM list for the date that EBSCO has set. Check step 2 for more information on checking correct dates.

4. Is there more access than the coverage date provided in the vendor title list?
  - a. If we have more access than what a current vendor title list has given us, it can be due to perpetual access or a purchase of archival content from an earlier period. Backfile and Archival Content has more information on confirming these types of titles.

## Examining Comparisons

As comparisons are made for ISSNs, titles and coverage dates, there are various types of matches and non-matches that will be found. This section will cover what they may mean and what should be done when they are identified.

1. Comparison Matches
  - a. When a match is found when comparing a vendor title list with the EBSCO holdings, this means that the title in EBSCO is activated as it should be. Leave this title activated and check for discoverability in EDS and accessibility by testing links.
2. Non-Matches for Vendor Title Lists
  - a. When there is not a match for a title in the vendor title list, this means that an activated title could not be found in HM that should be activated. Check for the title in HM. If it is included in the package but not selected, select the title. If the title is not included in the package, but is in the vendor title list, contact EBSCO to request the title be added and turned on.
3. Non-Matches for HM Download List
  - a. The title(s) are backfile or archival content. More about these are on the following page.
  - b. We no longer have a subscription for the title.
    - i. Lists of journals are made into package deals for customers each year, where some new titles can be included, or titles can be removed. We may have had access to a title the previous year, but no longer the next due to this reorganization of packages by providers.
  - c. The journal is a transfer title
    - i. Transfer titles are journals that have transferred to a different vendor or provider. Sometimes a list of transferred titles are included in vendor title lists, and other times they are listed on the vendor's website.

- ii. Make sure the title is turned on in the correct package if we have a subscription for it.

# Backfile and Archival Content

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## What Are Backfiles?

The terms “backfiles,” “archives,” and “archival content” refer to past serial content with perpetual access rights. Knowing how to identify and investigate archival content licenses and titles lists is important because it affects what content should be available to patrons and selected in HM despite not being in any active subscriptions.

## How to Identify Backfile Content

Older content or content not in a current subscription title list can be obtained through backfile purchases, cancelled subscriptions with perpetual access rights, or the transfer of a title to a different vendor. Open access can provide similar access to older content, but it must be monitored to ensure the content remains open. Backfile licenses and/or title lists can be found in the following locations:

1. Aleph Acquisitions/Serials module
  - a. Order and invoice numbers can be found in the appropriate ERS spreadsheet on SP, especially in the “Cancelled” and “Purchased” sheets.
    - i. Look for ERS sheets in the folder "ERS Archive" for noncurrent ERS sheets. A current ERS sheet will be on the main page of the eResources Shared Documents, with the title being "ERS-YY-YY".
    - ii. Most relevant items will have the object codes **EJBF**, E-journal Backfile (One Time Cost), or **EJRE**, E-journal (Recurring Cost)
  - b. Pre-2005 history is not available
2. [FLVC/FALSC Arrow reports](#)
  - a. All Orders for a Vendor and Date Range is the most useful report
  - b. Pre-2005 history is not available
3. Licenses and invoices
  - a. Any of the locations listed under [Vendor Title Lists](#)
  - b. Older licenses and invoices are kept in the serials librarian’s office
4. Subscription agents (Harrassowitz and [EBSCONET](#))
5. Vendor administrative accounts

If a backfile title list cannot be found by any of the above means, a request for a new title list can be sent to the vendor.



# Checking Linking and Full-Text Access

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## Confirming Full-Text Access

Throughout the holdings updates process, perform checks to ensure that titles are linking correctly and providing full-text access. Platforms may indicate titles with full-text access on table of contents pages through small green icons next to the article title; open access content is often identified in a similar manner using the stylized orange open lock. There have been instances where these icons have been configured incorrectly, however, so the most assured way to check access is by trying to view a full-text article from the journal in the date range. Causes of access problems include:

1. **Not Yet Activated:** It can take a few days for providers to turn on access to new subscriptions or purchases. For brand-new purchases, wait a few days, then try again.
2. **Incorrect URL:** HM occasionally has the incorrect URL for a resource. In this case, the URL would direct patrons to the wrong website or host site, or link to a different resource than it's supposed to. In these situations, contact EBSCO to get the URL corrected.
3. **Link Resolver Errors:** Link resolvers work with discovery services to retrieve accessible content with links to full-text resources. The customized FSU full text finder is a button with the "Find It @ FSU" logo. This button uses a link resolver to retrieve full text options for a resource. When errors occur with the link resolver, contact EBSCO to get the resolver corrected.
4. **Missing Proxy Headers:** Most platforms on which FSU provides content verify that patrons are affiliated with FSU and thus authorized to view purchased content through their use of an IP affiliated with FSU. Patrons off campus are authorized through a proxy server accessed through a proxy header added to the URL. Double check that the FSU proxy header is in front of the resource URL.
5. **Out-of-Date IP Ranges:** IP ranges are supplied to platforms using IP authentication at setup, but these ranges can become outdated. Sometimes IP addresses can be viewed and updated in the platform's admin portal; if not, contacting the vendor is necessary. FSU's active IP ranges can be found [here](#).
6. **Vendor Error:** The most common access problem occurs when the provider of the content has incorrectly configured access on the platform backend. Contact the vendor with proof of purchase to have them correct it.
7. **Ceased or Transferred Titles:** These titles may no longer be available on the platform of the original publisher. The journal homepage often indicates if a title's publication has been ceased or transferred and may provide a link to the new location. [Ulrichsweb](#) also provides detailed information on serials and their publication history. If a title has been transferred, check the new vendor package that the title has been transferred to and activate it there. Deactivate in old package. If a title has been ceased and has no accessible content, deactivate. If a URL needs to be corrected, contact EBSCO.

# Appendix A: Excel Formulas and Shortcuts

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Excel formulas are used to transform, compare, and otherwise work with data. The **LinkedIn Learning Online Training** library has courses dedicated to explaining Excel and its functions; FSU provides all its affiliates with premium memberships, so you can log in with a combination of your LinkedIn and FSU credentials.

## Keyboard Shortcuts

*Ctrl + A*: Selects all data in worksheet (data non-contiguous<sup>1</sup> to the active cell will not be selected; using the shortcut a second time will select all cells in the workbook)

*Ctrl + C*: Copy

*Ctrl + X*: Cut

*Ctrl + V*: Paste

Note: Excel doesn't allow for cell editing between copying and pasting.

*Ctrl + F*: Search (the default search range is the current sheet, but expanding the options in the resulting dialog box can change the search from within sheet to within workbook)

*Ctrl + Z*: Undo

*Ctrl + S*: Saves current workbook

*Ctrl + K*: Inserts hyperlink

*Ctrl + T*: Create table

## Formulas

**=IF(First Cell=Second Cell, "Yes", "No")**

This function allows you to make logical comparisons between a value and what you expect. The two results from this formula will tell you whether your comparison is true or false. "Yes" is true and "No" is false.

**=SUBSTITUTE(text, "old\_text", "new\_text")**

All instances of *old\_text* in the value in cell *text* are replaced by *new\_text*. The quotes around *old\_text* and *new\_text* are because those arguments are strings.

**=TRIM(text)**

Extra spacing is removed from the value in cell *text*; this includes having only one space between words.

**=VALUE(text)**

The value of cell *text* is transformed into a number format. If Excel cannot make the conversion, it returns a value error.

**=VLOOKUP(lookup\_value, table\_array, col\_index\_num, 0)**

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<sup>1</sup> Contiguous cells are cells not separated by empty rows or columns.

The *lookup\_value* is the cell address of the value that is being searched for in the first column of *table\_array*, a range of columns. The *col\_index\_num* is the number of the column in *table\_array* which the value returned by the formula should come from. If the value isn't found, a N/A error is returned. [Here](#) is a helpful tutorial on the function.

When *table\_array* and *lookup\_value* are in different worksheets, the former requires a sheet reference number and is structured like '**Sheet1**!A:A'; when the two are in different workbooks, the *table\_array* reference is even more complex. Selecting the desired columns for *table\_array* while typing the formula will create a reference with proper punctuation.

The **0** can be replaced with the Boolean **FALSE**, but it cannot be left out despite being an optional argument, as the function defaults to fuzzy matching.

**=VLOOKUP(LEFT(text,num\_chars)&"\*",table\_array,col\_index\_num,FALSE)**

A **VLOOKUP** on a left-anchored partial string uses the cell address traditionally in *lookup\_value* in *text* and *num\_chars* as the number of characters in text used in the search.