

Guide to the UKRR offered holdings template (Feb 2011 version)

As part of the development of the LARCH system, UKRR revised the offered holdings template used to upload lists of offered journal holdings. These guidelines to the offered holdings template take into account the changes to the template made as part of this process, and are intended to assist you in ensuring your holdings are uploaded to LARCH successfully.

Any version of the template dated May 2010 or later will be suitable for uploading holdings to LARCH, however it is always worthwhile downloading the most recent version from the UKRR website before starting to compile a list. The most recent file will contain any enhancements and fixes that have resulted from any bugs reported by other members, or discovered by UKRR.

Unlike previous versions, the offered holdings template now has only two sheets. The overview sheet is there to assist you in compiling your list, holding details about the provenance of the data in the template as well as automatically calculating the total metreage in the template and the number of offered holdings. The data relating to the offered holdings is held in the 'Offered holdings' sheet, and this sheet is the only one imported into LARCH.

LARCH and the template – how they work together

LARCH knows where to look for the data in the template due to a named range on the Offered Holdings sheet called 'UKRRData'. This covers all cells in the area A2:AK2002, which is the entire area in which data can be input including the UKRRid column and the column titles. When a file is uploaded LARCH first looks for the UKRRData range, and if it is found uses the column titles to identify what each column is. Inserting columns into the template will cause the named range to expand to take into account the new columns (see final section of this guide: Adding local data). You can check the named range exists in the template by either pressing **F3**, or clicking on the dropdown button in the name bar (which is the white box to the left of the formula bar). Note that copying and pasting the template to a blank Excel workbook will not copy over the named range, whose presence is necessary for the data upload to work.

As far as LARCH is concerned one line is one offered holding, and all the data relating to that holding must be contained on the same line. The various pieces of data relating to that item (represented by the individual columns) match the data values stored by LARCH. LARCH uses the column title to identify what the data in the column is, and the UKRRid to match all the data it extracts from the various columns to one item. Consequently if one of the column titles is missing, or if a UKRRid is missing or duplicated, LARCH will not be able to extract all the data in the template and the upload will fail.

In order to reduce the possibility of this happening, the 'Offered holdings' sheet of the template is protected by a password. This stops columns being deleted, rows from being inserted or deleted, and the UKRRid from being removed. However the password protection can restrict functionality that may be useful to members preparing lists for submission e.g. deleting a row containing details of a journal that is being removed from the submission, or removing columns that have been inserted by the member to hold local data. If you wish to unlock the sheet and remove the protection you can do so using the password **bug\$bunny**, but please be careful once you have done this to avoid the possibility of causing problems later.

Please note that the finalised list from UKRR containing the retention values will not be returned to you in the offered holdings template, but will be available for you to download from LARCH as a report. The overall summary of retention levels is not included in this report, but will be inserted in the alert sent to the member to announce that the finalised list is ready. Levels of retention and disposal can also be viewed in LARCH via the Quick Summary report.

Data validation

During the file upload process your list will undergo data validation, which checks some of the data values you are uploading to ensure they are present and are the correct format expected for that item. Validated items that you need to be aware of are shown below.

Data item	Rule
UKRRid	Must be present and unique in the template.
ISSN	ISSN must be 8 characters long (excluding hyphen).
	ISSN must contain only 0-9 and X characters only (excluding hyphen).
	X can only be present in ISSN as the last character.
Title	Must be present if data is present elsewhere on the row.
Publisher	Must be present if ISSN is absent.
Place of Publication	Must be present if ISSN is absent.
Holdings	At least one of the holdings fields (including supplement) must contain data. Cannot be longer than 20 characters.
Shelf space (metreage)	Must be present and be a valid numeric value.

Filling in the template

Below is guidance on completing the individual data fields in the offered holdings template. The name of any items featured in the data validation table above is shown with a pink fill. The data validation that was previously included in the template has been removed as some members reported that it could be problematic when adding holdings. The exception to this is the Shelf space (metreage) field which will still only accept numbers in the format 0.00.

Within LARCH the maximum number of characters that can be included in each field is set as part of the system coding, in line with best practice when managing a database. The number of permitted characters in each field is given below, beneath the name of the field.

Note that because of the way scarcity checking is reliant on an automated search for other holdings in SUNCAT, the greatest number of matching holdings will be retrieved if you offer each ISSN/title change as a separate holding.

<p>Section A: Identifiers.</p> <p>These details help UKRR, the BL, and the Member Library distinguish one holding from another.</p>	
<p>UKRRid</p>	<p>This is an identifier to track each offered holding through the UKRR process and must be present and unique within the template for the upload to be successful. The UKRRid is already in the template when you download it, and is set to be the same as the row number in order to reduce confusion. However it is not essential that they correspond which will be the case if you delete a row.</p>
<p>Local ref. code/ Shelf mark</p> <p>max. 255 characters</p>	<p>This field provides a location for members to add their own identifier to the offering, such as a shelf mark or system reference number. It is optional and is not required by either UKRR or the BL for their processes.</p>
<p>Section B: Bibliographic details</p> <p>This section holds the details of the publication being offered. They are used by UKRR and the BL to identify the material and match it to BL stock and other material offered to UKRR by other members. It is also used by EDINA to search of holdings of the same item within UKRR members' collections.</p>	
<p>ISSN</p> <p>max. 9 characters</p>	<p>Enter the ISSN for the print version of the title if one is available. Please note that if you do not have an ISSN for the title you must give the publisher and place of publication in their respective columns, otherwise the upload into LARCH will fail.</p>
<p>Title</p> <p>max. 255 characters</p>	<p>Enter the current title of the journal. Please do not use abbreviations. A title must be given if there is any data other than the UKRRid elsewhere on the row.</p>

Title changes max. 2096 characters	Enter any previous or subsequent titles for the journal. If the title changed name during the range of holdings which is being offered, the issues offered under the new title should be detailed separately on the line beneath the former title.
Publisher max. 255 characters	This field must be completed if an ISSN is not provided. Include the publisher of the journal so that the holding being offered can be correctly matched to holdings at the BL and other holdings offered to UKRR. It is not necessary to supply this information if an ISSN is present.
Place of Publication max. 255 characters	This field must be completed if an ISSN is not provided. Include the place where the journal is published so that the holding being offered can be correctly matched to holdings at the BL and other holdings offered to UKRR. It is not necessary to supply this information if an ISSN is present.
<p>Section C: Holdings on offer</p> <p>The section holds the details of the issues being offered. They are used by the BL to check if any of the offered material is required to complete their stock, during scarcity checking to find matching holdings in other UKRR member collections, and by UKRR to ensure that any holdings found have not been cleared for disposal already. Note there is a spreadsheet available from the UKRR website called 'holdings extractor', which shows a few ways to use Excel formulas to convert holdings stored in a text string into the various columns required in the template.</p>	
Start year max. 20 characters	Complete as many of these fields as is necessary to match the date and enumeration given on the first issue in the holding you are offering. <ul style="list-style-type: none"> • At least one of the holdings fields, or alternately the supplement field, must have data in it if as title is given on the row. • Only use the 'part' field if your journal names a part in the enumeration, otherwise use 'volume' and 'issue'. • If only complete volumes are being offered then it's okay to just complete the 'year' and 'volume' and leave the 'issue' blank. • If you are only offering one issue, volume, or year's worth of material then this should be entered as the start of the holding and the end of the holding left blank.
Start month/period max. 20 characters	
Start volume max. 20 characters	
Start part max. 20 characters	
Start issue max. 20 characters	
End year	Complete as many of these fields as necessary to match the date

max. 20 characters	and enumeration given on the last issue in the holding you are offering. The notes above relating to the part, complete volumes and single issue apply to the enumeration for end issues also.
End month/period max. 20 characters	
End volume max. 20 characters	
End part max. 20 characters	
End issue max. 20 characters	
<p>Section D: Further holdings details</p> <p>Details of material included with or missing from the offered holding can be included in this section. As funding from UKRR is based on the shelf space occupied by the holding, this field must be completed for all offered holdings.</p>	
<p>Supplement details max. 1024 characters</p>	<p>Enter any relevant information about any supplements to the journal that are also being offered.</p> <ul style="list-style-type: none"> • If a complete set of supplements are being offered and detailing them would be too intensive, include a statement such as “all supplements held”. • If the supplement is known by a separate title (i.e. has its own ISSN) it should be detailed as a separate offering on another line.
<p>Gaps max. 1024 characters</p>	<p>Give the details of any issues missing from the offered holding. The enumeration should match that used to identify the main holding.</p>
<p>Shelf space (metreage) max. 12 characters</p>	<p>Enter the shelf measurement of the holdings which you are submitting using metres and centimetres (i.e. 1 metre 23 centimetres would be 1.23). If the measurement for the item has already been included with another item (i.e. they are bound or stored together) enter 0.00 in this column. Any offered holding which does not have a shelf space specified will cause the upload into LARCH to fail.</p>

Adding local data

Although the template layout and data fields should not be altered, it is possible to add new columns in order to hold data which would allow the submission to be tracked locally. To do

this insert the columns in the 'Offered holdings' sheet somewhere between the UKRRid and the Shelf space (metreage) column. If the column is inserted to the right of the Shelf space (metreage) column it will not be within the named range, so will not be uploaded unless the range is altered manually. The columns must have a title specified in row **B**, which is the same row used for the other column titles. The local data will be uploaded into LARCH along with the holdings data, and will be included in the Offered Holdings Report you run to find out the retention values once the list has been finalised.