Electronic Resource Management
Quick Start Guide

sierra

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How to use this guide

This guide can be used as a training manual in its own right or as the basis for a local training manual where it is tailored to include more specific instructions based on library policy and practices.

For additional information about Sierra functionality, see the Sierra documentation (http://documentation.iii.com/sierrahelp/). Underlined topics below are hyperlinks to the documentation. Right-click the text, select Copy Hyperlink and paste the URL directly into a browser.

> A valid login is required to access the links – your Sierra system coordinator should have the necessary details. Alternatively, a copy of the Sierra documentation is located on your own Sierra server and can be opened from within the Sierra staff application: **Admin | Manual**. Hyperlinked text can be used to search for topics in the local copy of the documentation.

Introduction

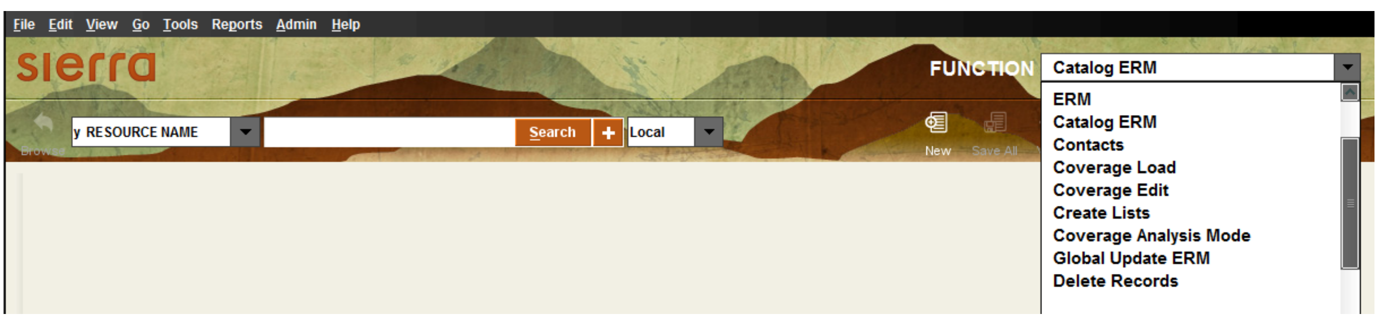
Electronic Resource Management (ERM) allows you to manage the relationship between your library and providers of electronic metadata and text, such as abstract, index, and full-text databases, including databases of serials, monographs, and media in electronic format. These databases are called resources.

Use of resources such as abstract, index, and full-text databases is typically licensed to a library for a period of time.

Electronic serials (sometimes referred to as electronic titles), like print serials, can be purchased through subscriptions. Electronic serials have coverage data, which is similar in concept to holdings data. (Print serials and print serials vendors are managed with Serials.)

Log in

The ERM functions are done in the Sierra Desktop Application (SDA), or in the equivalent Sierra Web.



After logging in, the user can select the workflows assigned by the system administrator from the **FUNCTION** menu.

ERM specific functions can also be accessed from the Go menu: **Go | Electronic Resource Management**, or in some cases **Go | Administration**.

Custom settings and preferences

Many functions are customizable to the user, for example: screen and text colors, editor font and font size, new record templates, etc.

Customization is made via Settings, Options and Preferences. What an individual user can customize is mostly controlled by permissions.

Record types created in ERM

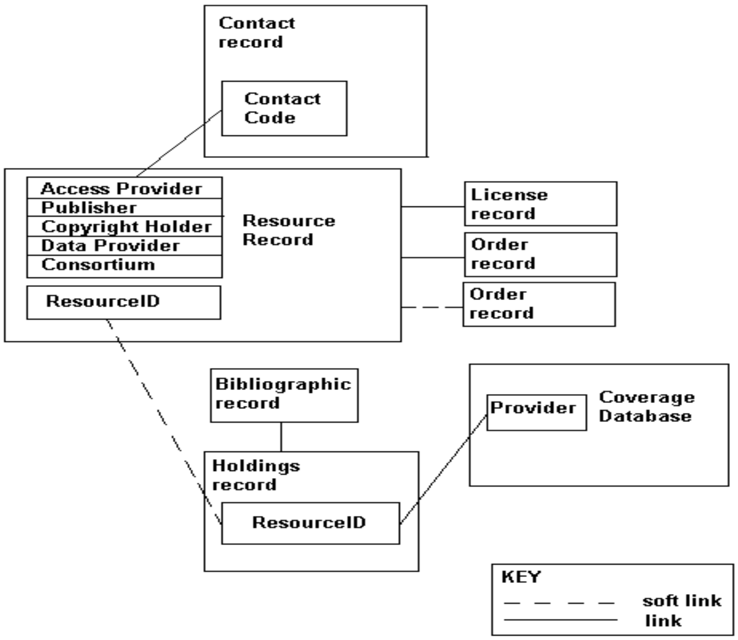
The following record types are used in ERM. There is also a coverage table which is used in managing your resources.

- **Resource records** – refer to a specific resource, a journal package or database which the library has purchased. This is the "parent" record type for ERM. They are soft linked to holdings/checkin records. May be linked to one or more license or order records and associated with multiple contact records. Maximum of 1000 license, and 1000 order records may be linked to this record type. Resource records may be created in the **ERM Catalog** or the **Catalog** function in Sierra.
- **License records** – stores the contractual terms of the resource. May be linked to one or more resource records. A maximum of 1000 license records may be linked to one resource record.
- **Contact records** – stores details on how to contact the resource provider. May be associated with one or more resource records. There is no limit to the number of contact records that may be stored in Sierra. Must be created before the code can be inserted in a resource record. NOTE: Contact records are not the same type of records as vendor records which are used in acquisitions functions. Contact records are created in the **Contacts** function.

  In consortial ERM, contact records are viewable to all affiliations.

- **Holdings records** – may be created during Electronic Holdings Administration when coverage information is loaded or in the Catalog or Serials Checkin functions of Sierra.
- **Bibliographic records** – may be created during Electronic Holdings Administration when coverage information is loaded, if the records don't exist in the catalog already.
- **Order records** – contain information on paying for the resource. May be linked to one and only one resource record. This record type can link or soft link to resource records.

This diagram shows the relationship of the records used in ERM:



Record fields

Almost all record types (that is, resource, order, holdings, license, etc.) consist of fixed-length fields and variable-length fields. Contact records have no fixed-length fields, only variable-length fields.

Each fixed-length field contains a specific code, numeric or alphabetic or alphanumeric, which is selected from the set of valid codes for that field. There are also fixed-length fields which contain dates or numeric values. Each fixed-length field for a specific record type appears in every record of that type. Fixed-length fields are not repeatable. Valid codes are established in the General Parameters of the Admin menu. Modification, addition, or deletion of these code values are performed only by a user with appropriate permissions.

All variable-length fields are repeatable. Some fields have a specific use and data must be entered according to what the system requires (for example Resource ID). Other fields, (for example: Note), are available for you to enter free text. Variable-length fields can be indexed and may be used to retrieve records. ERM is set up with standard indexing but the library can discuss indexing changes with Innovative.

> The Resource ID field should not be repeated and must not be longer than 64 characters. If coverage data will include longer IDs, they need to be converted using the Coverage Spreadsheet Conversion rules. See more later in this guide, under *Formatting Coverage Spreadsheets (Text Files).*
>
> In consortial ERM, do not add more than one Affiliation field to a resource record. Only the first one functions.

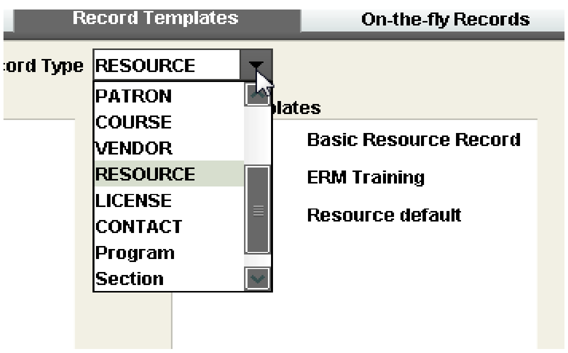
Variable-length fields may be established as multi-line fields. The library can define a field as multi-line, state the default number of lines, and define line labels. The setup is done by Innovative.

Variable-length fields may also be established as multi-value fields. Multi-value fields allow you to maintain a list of standard values for each multi-value variable-length field, thereby making it easier to keep to a controlled vocabulary. The system comes with default setup that can be changed at any time. The setup is done by Innovative, but the library maintains the tables.

A field cannot be both multi-line and multi-value at the same time.

New record templates

The Sierra system uses record templates to create new records. A record template can be configured by the library to prompt the user to fill in specific fields. The record template can also be configured to contain default data in certain fields which is automatically inserted into the record during the new record creation process. An authorized user from the library may configure an unlimited number of new record templates in the system. To work with record templates, choose **Admin | Settings | Record Templates** tab from the menu bar.



Creating resource, license and contact records

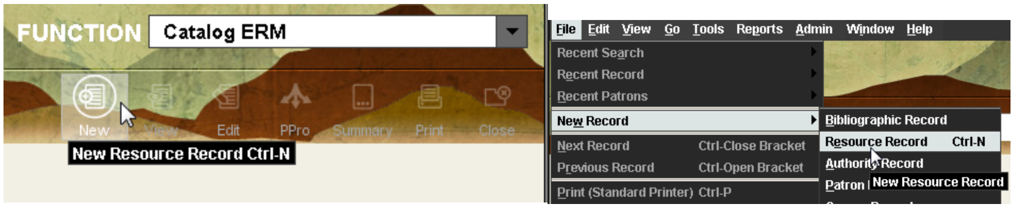
The contact record must be created before the following fields may be used in a resource record:

- Access Provider
- Publisher
- Copyright Holder
- Data Provider
- Consortium

These fields in resource records are validated against values in the Contact Code fields of contact records and when present this information displays in the **Contacts** tab of the resource record.

Creating resource records

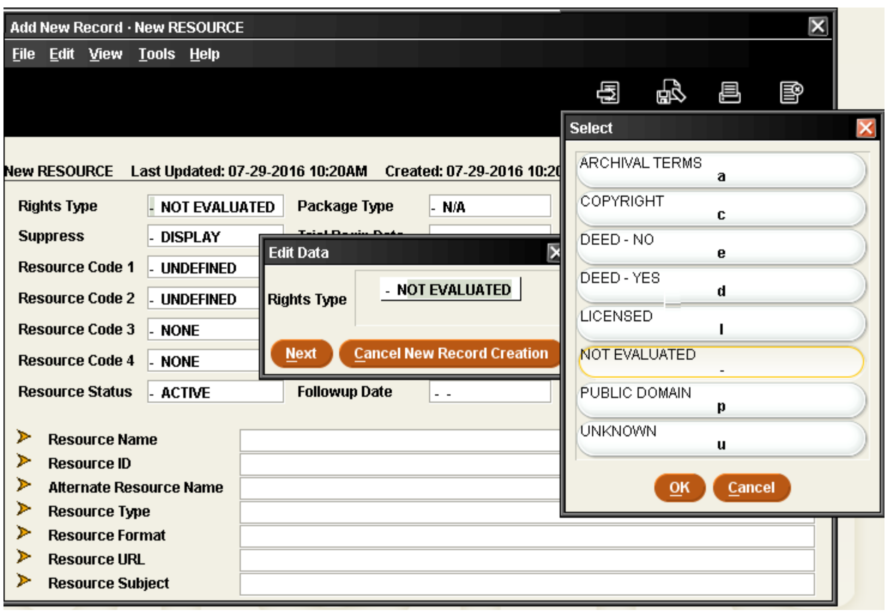
- Choose **Catalog ERM** from the **FUNCTION** menu
- Click the **New** icon on the toolbar, or select **File | New Record | Resource Record**



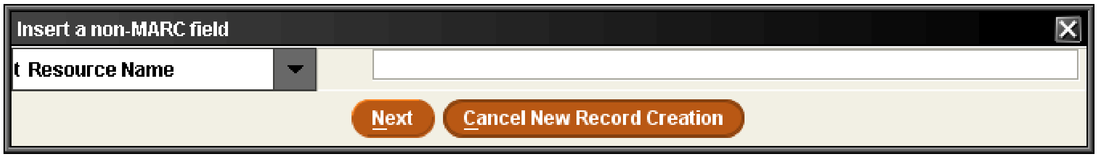
- Use the preferred new record template, or select the appropriate template from the list provided. This depends on the settings in **Admin | Settings | Record Templates** (Preferred Templates), and **Admin | Settings | New Records** (values set in drop-down for each record type)

Once the template has been selected, if the **Use wizard to create new records** setting is enabled, Sierra offers a series of dialogs to complete the record. The fields required will be presented beginning with the fixed fields that are defined as prompts, and then the variable length field prompts.

- The system prompts you to enter a value for the field.
- Double-click in the white area of the field to view valid fixed-field values

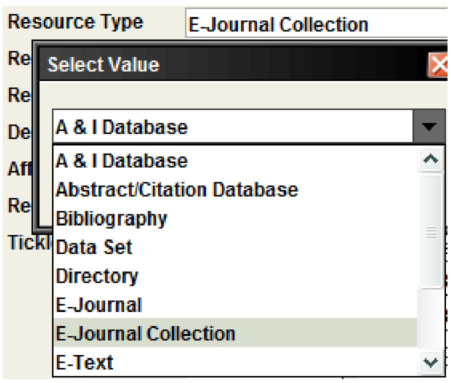


- Select from the list by clicking with the mouse or by using the keyboard arrow keys, or type the code, if known. Press the *<Enter>* key or click the **Next** button to move to the next prompted field.
- If there is no change to a default value of a fixed-length field, click the **Next** button
- If prompted for Access Provider, Publisher, Copyright Holder, Data Provider, or Consortium fields – enter the Contact Code from the contact record. (Double-click to get a search window to search for the desired contact record)
- Variable length fields which are prompts from the new record template "wizard" display in a wide, short box
- The variable-length fields in resource records are non-MARC fields



- Enter data in the fields required by the record template into the variable-length field box and click **Next** to move to the next prompt

With ERM, you can maintain a list of standard values to maintain consistency of data in your database in resource and license records. When you insert one of these fields, you can enter a value from the list by starting to type it in the field. The system displays the complete value. Press *<Enter>* to accept the value or continue typing until your field value appears. You can also double-click in the field to see the complete list of values and select one.



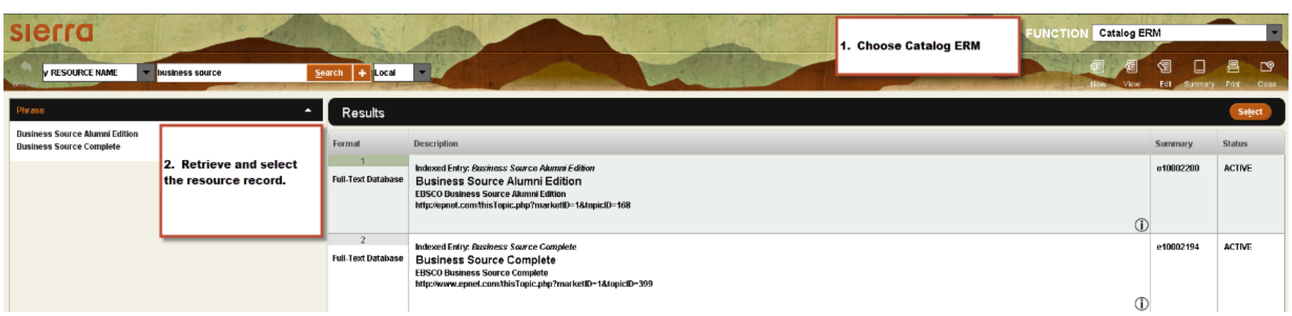
In consortial ERM, add an Affiliation field to every resource record for which coverage will be loaded. This tells the system which coverage database to link to.

- Save the record using the **Save** icon from the toolbar

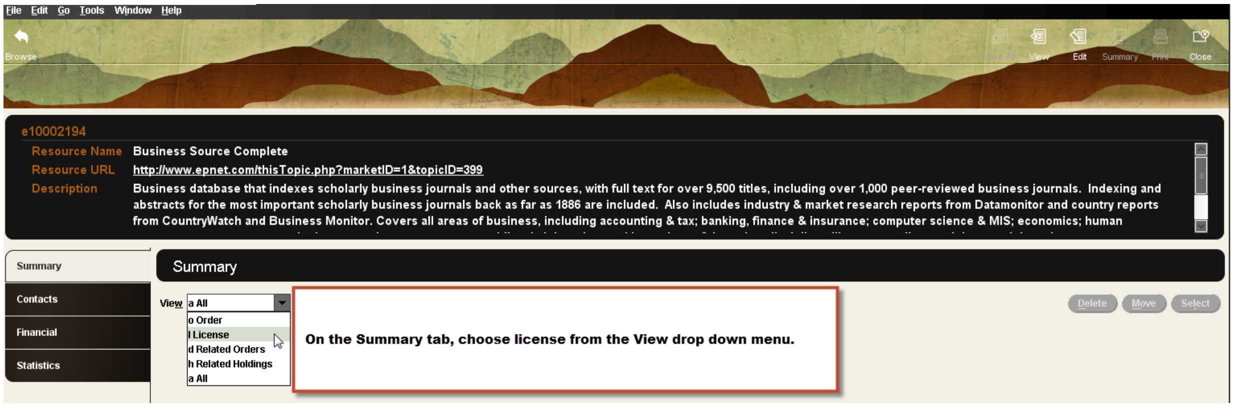
Creating license records

The license record contains fixed-length and variable-length fields which may be used by the library to delineate details regarding the licensing (or contractual) information for the associated resource record.

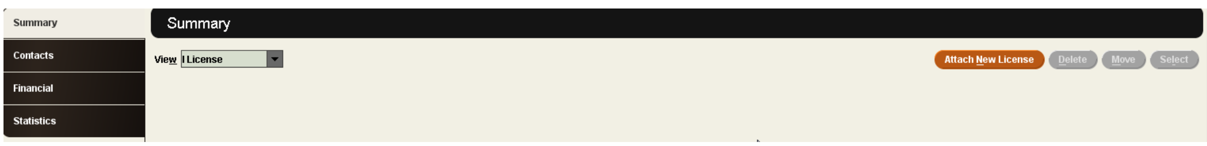
- It is possible to attach multiple license records to a single resource record
- None of the variable-length license fields are indexed by default, although it is possible to index certain fields



- Click the **Summary** tab associated with the resource record.



- Click the **Attach New License** button to create a new license record

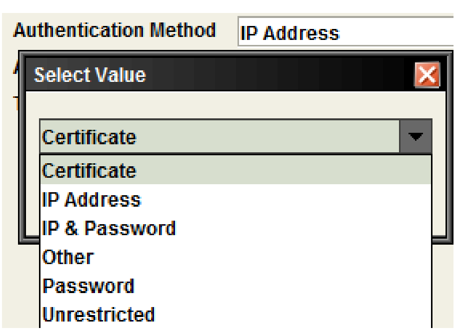


- Use the preferred new record template, or select the appropriate template from the list provided

If the **Use wizard to create new records** setting is enabled, Sierra offers a series of dialogs to complete the record. The fields required will be presented beginning with the fixed fields that are defined as prompts, and then the variable length field prompts.

- The system prompts you to enter a value for the field
- Double-click in the white area of the field to view valid fixed-field values
- Enter data in the fields required by the record template into the variable-length field box and click **Next** to move to the next prompt

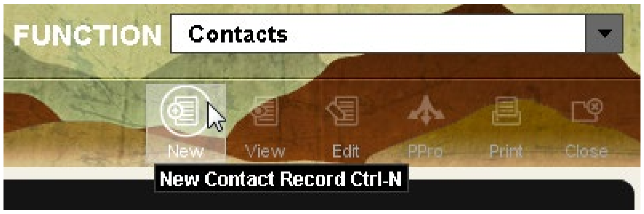
With ERM, you can maintain a list of standard values to maintain consistency of data in your database in resource and license records. When you insert one of these fields, you can enter a value from the list by starting to type it in the field. The system displays the complete value. Press *<Enter>* to accept the value or continue typing until your field value appears. You can also double-click in the field to see the complete list of values and select one.



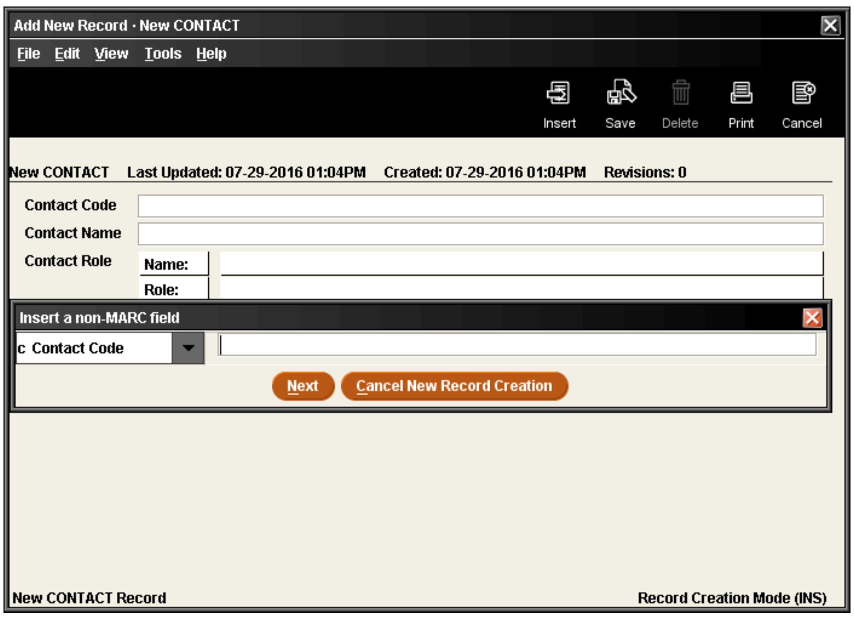
- Save the record using the **Save** icon from the toolbar

Creating contact records

- Choose **Contacts** from the **FUNCTION** menu and click the **New** icon



- Use the preferred new record template presented, or select the appropriate template from the list provided
- If the **Use wizard to create new records** setting is enabled, Sierra offers a series of dialogs to complete the record.
- The system prompts you to enter a value for the fields. There are no fixed fields in contact records.



The Contact Code field enables you to associate a resource record with the contact record. The code can be 1-5 characters long.

Create contacts for use in the following resource record fixed fields, depending on the library's needs: Access Provider, Publisher, Copyright Holder, Data Provider, Consortium.

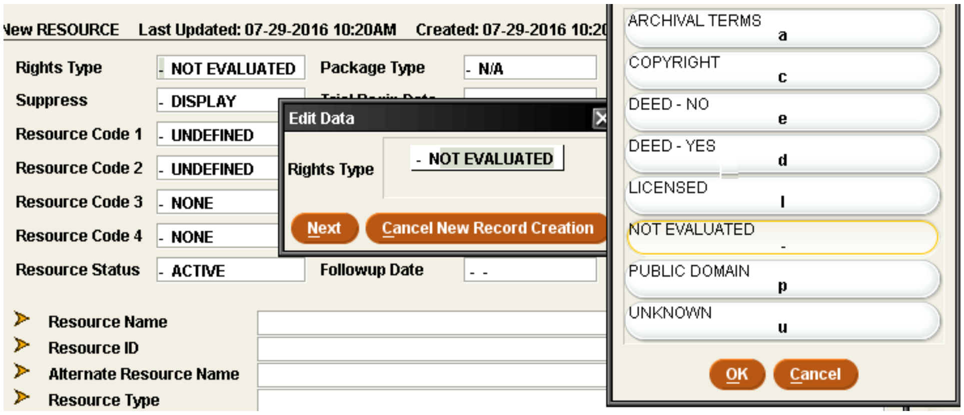
The category labels may be changed to reflect the needs or descriptors desired by the library.

- When you finish entering contact information, choose **Save** from the toolbar

Editing resource and license records

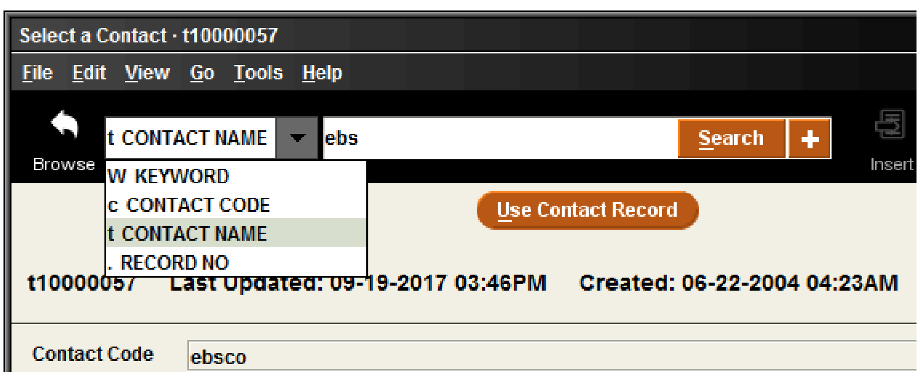
Modifying fixed-length fields

Resource and license records will allow you to edit all fixed-length fields. These fields are most often validated against the system fixed-length codes file. Examples of these type fields include Package Type, Resource Status and Suppression. Double-click either the code or the description element of the field and choose a value.



There are also fields that are validated against fields in other records – the Data Provider field which is populated by a Contact Code is an example. The system will only accept a valid Contact Code already stored in a contact record.

- Place the cursor in the field and choose **Edit | Edit Field**, or enter a valid code into this field, or double-click in the field. (If entering a valid code, the system will automatically complete the entry as soon as it recognizes a match).
- If you choose to search for a contact, and the search retrieves a browse list, select a single contact record, open it with the **Select** button, or double-click the entry. Choose **Use Contact Record** to use this record. If the search retrieves a single match, check that it is indeed the correct record and choose **Use Contact Record**.



- **Date fields** – With the cursor in a date field, you can either enter the date or open the calendar to select a date. Dates appear in the format of your system. You may use the following shortcut keys:
  - Press **t** to enter today's date
  - Press **b** to represent a blank date
  - Press **c** to open the calendar to select a date
- **Numeric fields** – Concurrent Users and Breach Cure in license records: can contain max 4 digits each. A value of '9999' in Concurrent Users means 'unlimited' and displays "Unlimited" if set to display in WebPAC/Encore. (Note that this field is informational only, it won't do any checking against the set limit)

Modifying variable-length fields

Resource and license records variable-length fields can be standard, multi-line, or multi-value. All fields are non-MARC.

- **Standard variable-length fields –** are determined by your library during the setup of your system. The data in these fields is free text and usually alphanumeric. Some fields have a designated use that cannot be changed and data must be entered according to the requirement for each field, for example Resource ID.
- **Multi-value variable-length fields –** these are variable-length fields which normally contain terms chosen from a library-maintained list of standard values. The function is similar to fixed-length field codes, in that you can choose from a predefined list. However, multi-value variable-length fields also permit the typing of unique text in the field and are not limited to only the values associated with the field.
  - It is possible to insert more than one value by separating values with semi-colon. Type a semi-colon after the first value has been inserted, and for any subsequent values which may be necessary.
  - Multiple values in a single field should not be used in a field that is indexed. For example, you normally insert a new Subject field for each subject term.
- **Multi-line variable-length** fields – for example Tickler fields, or the Administration field in the resource record. This type of field has multiple lines, usually with line labels, for example Username/Password/Administrator/Administration URL. There can be up to 6 lines, but most fields don't use that many.

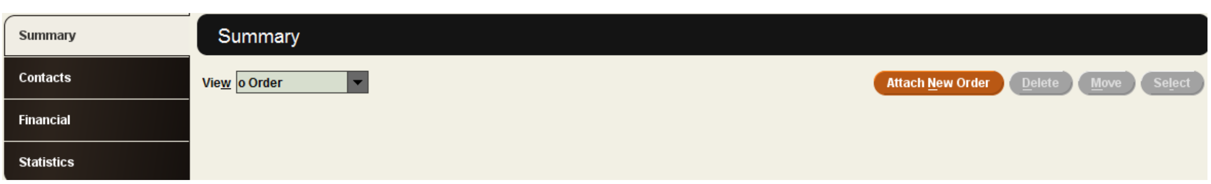
Order records in ERM

Order records may be directly linked or soft linked to the resource records.

If the primary link for an order record is to a bibliographic record but payment data should be part of the resource record statistics, choose to "soft-link" the order. See instructions in section *Soft linking records in ERM*. This may happen for example if the resource is for a package where individual titles are invoiced separately.

If an order record represents the whole resource, it should normally be directly attached to the resource record. To create a new order for a resource:

- Choose **Catalog ERM** from the **FUNCTION** menu and retrieve a resource record
- Click the **Summary** tab for the resource record
- From the **Summary** tab, select Order from the **View** drop-down menu



- Click the **Attach New Order** button and follow the normal procedure for creating a new record:
  - Use the preferred new record template, or select the appropriate template from the list provided
  - If the **Use wizard to create new records** setting is enabled, Sierra offers a series of dialogs to complete the record. The fields required will be presented beginning with the fixed fields specified by the template, and then the variable length fields.
  - The system prompts you to enter a value for the field
  - Double-click in the white area of the field to view valid fixed-field values
  - Enter data in the fields required by the record template into the variable-length field box and click **Next** to move to the next prompt
  - Save the record using the **Save** icon from the toolbar

Transfer an order from a bibliographic record to a resource

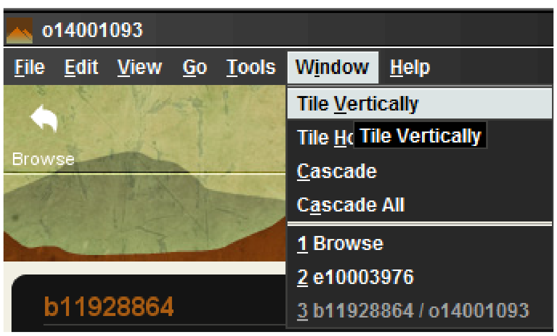
If the order record should be directly attached, and it already exists as attached to a bibliographic record, it can be transferred from the bibliographic record to the resource record. This may be the case if the library previously used bibliographic records to represent databases etc. and now are starting to use ERM instead.

To transfer a record from a bibliographic to a resource record it is necessary to use the Multiple Windows feature:

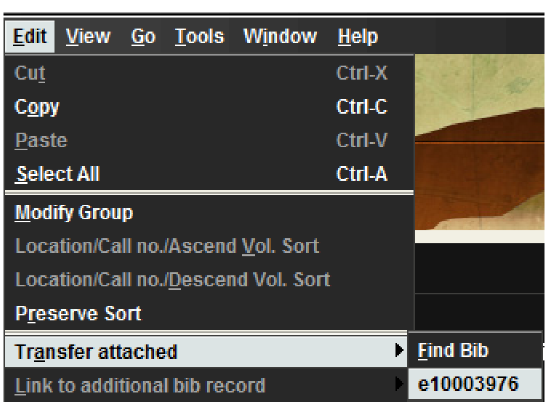
- Choose **Admin | Settings** from the menu bar and go to the **Windows** tab
- Select the *Multi Window Mode* radio button and click **OK**. (If this setting should be permanent it needs to be saved with **Save Settings** before you click OK)

To transfer the order:

- Retrieve the source record (bibliographic), which will open in a separate window
- Retrieve the target record (resource), which opens in a second window
- It might be handy to tile the windows side by side for a better overview. In either window, use the **Window** menu and choose **Tile Vertically**



- In the bibliographic record window, find the order that should be transferred. From the **Summary** tab, select Order, or All, from the **View** drop-down menu and check the checkbox for the order.
- Choose **Edit | Transfer Attached** from the menu bar and the resource record should be listed as an option:



  - Note: the resource record number is only available from the Summary tab (not from the Records tab)
- Choose the record number for the resource record and the system initializes the transfer

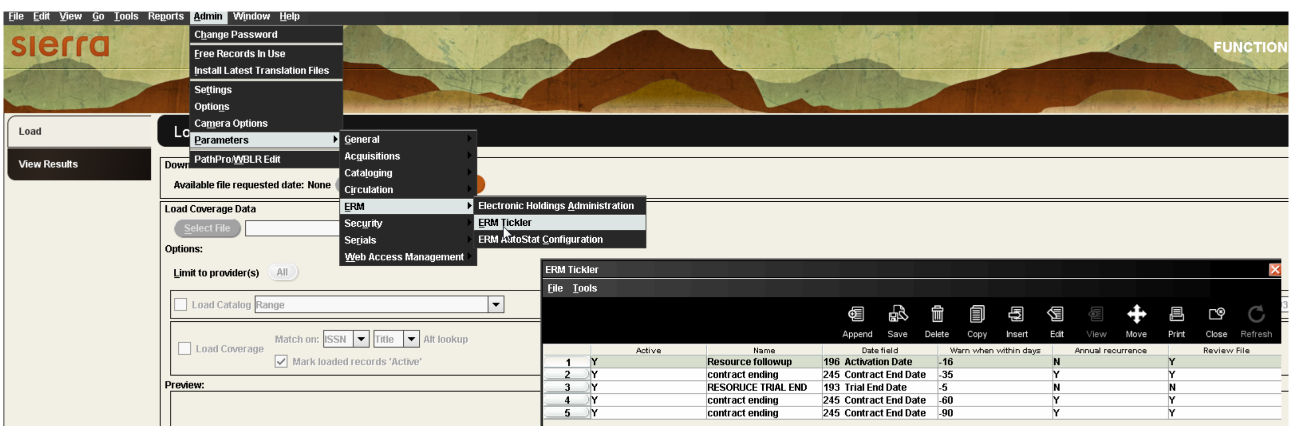
- If this is the only record attached to the bibliographic record the system asks if the bibliographic record should be deleted or retained

- When the transfer is finished, move to the resource record window and from the **Summary** tab, select Order to view the order record

Using email reminders

- **Ticklers** (or reminders) are used to send email reminders to certain staff members as reminders of important dates associated with electronic resources, for example trial end dates, contract beginning and ending dates.
- Ticklers may be configured in the **ERM Tickler** file, or they may be individual ticklers associated with a specific record
- Dates may be associated with a "tickler" rule, or they may be unique to a certain record for a one-time special purpose. A tickler rule is established to send an email reminder on the specified date as a reminder regarding a group of records that share a common date (starting, ending, renewal, etc.).
- When a tickler has been triggered, the system adds a message to the record which is identified as a Tickler Log variable-length field. This log will have the date the reminder was sent. This field may be deleted by the library when they are no longer necessary.
- It is possible to associate more than one tickler rule with the same record. For example, to send a reminder 90 days before the end of contract date, AND later to send another reminder (using a different rule) 10 days before the end of contract date.

To create a tickler *rule*, choose **Admin | Parameters | ERM | ERM Tickler** from the menu bar.

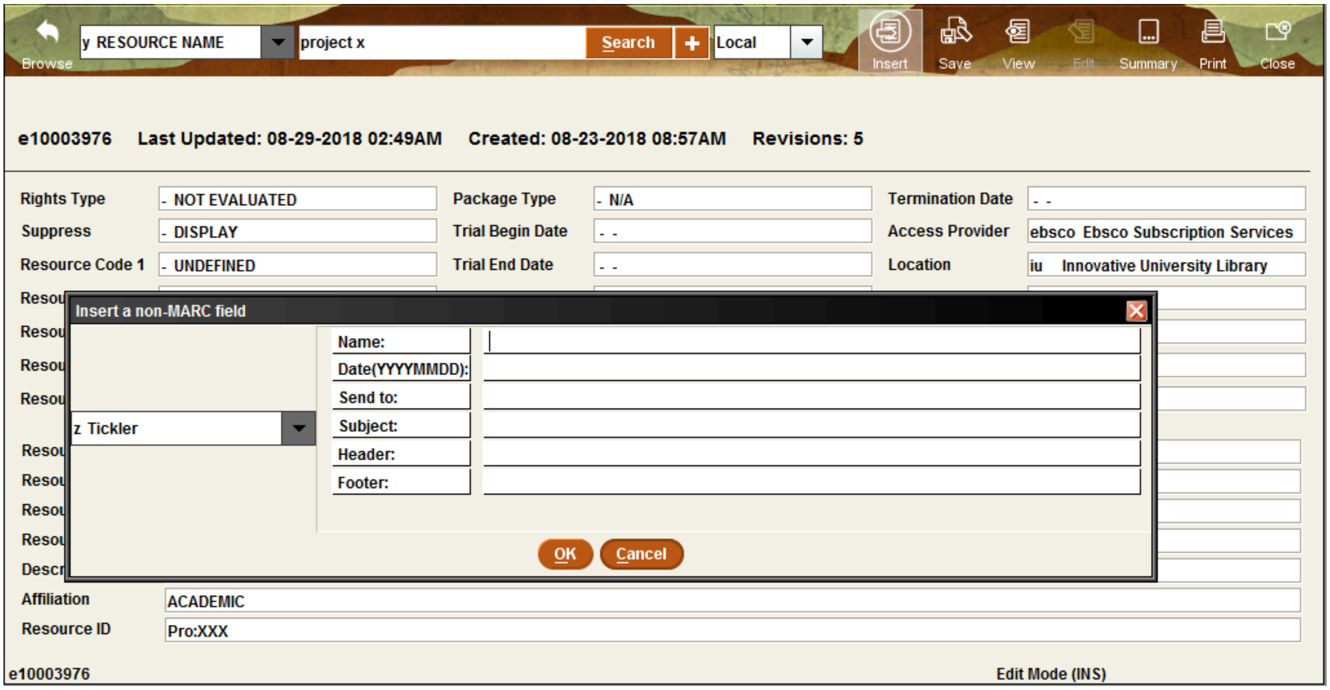


- Select the **Append** icon to create a tickler in the automatic tickler file
- Select the button choice regarding whether the tickler is active or not (radio button 'yes' or 'no')
- Enter the name of the tickler. Typically, the name is the date field name.
- The choices of default ticklers in resource records are:
  - Trial begin date
  - Trial end date
  - Review date
  - Registration date

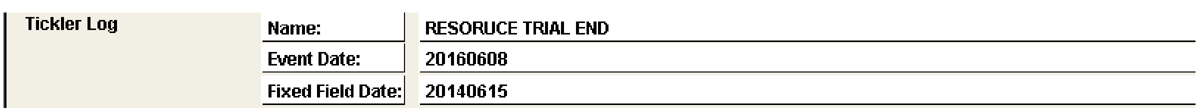
- Activation date
- Followup date

- The choices of default ticklers in license records are:
  - Licensee sign date
  - Licensor sign date
  - Contract start date
  - Contract end date
- Enter the number of days before or after the date that you want the email reminder sent in the *Warn when within days* element
  - To configure:
    - a number of days before the date, type in a negative number (for example: -30)
    - a number of days after a specific date, type in a positive number (for example: 3)
    - a reminder on the date itself, enter 0 (zero).
- The selected date field can be combined with a value in a coded fixed-length field to make a distinction between resources. For example, if different preparation periods are applicable to resources whose contracts end on the same date, or for resources belonging to different members of a consortium. Specify which additional field to use in the *Other field* element and define the code to match in the *Other field value* element.
  - You can furthermore use the *Annual recurrence* element to specify that the tickler should repeat annually. The system disregards the year in the Date field when *Annual recurrence* is set to 'yes'. This causes the email reminder to be sent in any year in which the system can match the month and day in the tickler rule's Date field to a value in the indicated fixed-length field of a record.
- Instruct the system to generate a review file containing the data when the rule is used, choose 'yes' or 'no'. If the review file is generated, it will be necessary to utilize the Copy function in Create Lists to view the system-generated file.
- Enter the email address (or addresses – separated with a comma) to which the reminder should be sent
- Enter the appropriate Email Subject, which will be printed as the subject line of the email
- Enter the optional Email Header, which will be the text printed at beginning of the email
  - The record data is inserted after the header text
- Enter the optional Email Footer, which will be the text printed at the end of the email, after the record data

To configure a special email reminder for a particular resource or license record, click the **Insert** icon while editing the record and select Tickler.



- Configure as discussed above (name, recipient(s), subject, etc.). Note that the date must be entered as YYYYMMDD.
- After a reminder is sent, the system will generate a message in the Tickler Log field of the appropriate record



Soft linking records in ERM

Holdings and order records may be "related" to a resource record. Sierra refers to this relationship as "soft linked". The "soft-links" basically function as "pointers" from the resource record to the appropriate holdings or order record. These "soft-linked" records are identified on the **Summary** tab for resource records as "Related Holdings" or "Related Orders".

This conceptual function permits the library to maintain a resource record for the specific database provider (or package). This also permits the addition of holdings records to the specific, individual bibliographic titles which comprise the journals included in the database. It also facilitates the maintenance of the dates of coverage for each journal.

Resource records are connected to bibliographic records through holdings records. The Resource ID field forms the "soft link" between the holdings and resource records. This link is visible in the holdings records by the presence of the ERM Link variable-length field which contains the value "SLK<resource record number>"

Order records may be directly linked or soft linked to the resource records. They are soft linked to resource records by the ERM Link variable-length field which contains the value "SLK<resource record number>"

Creating related holdings records

Related holdings records are holdings records which do not have a checkin card associated with them, but which do contain a "Library Has" or Holdings statement

- To soft link a resource record to a holdings record from the resource record display, follow these steps:
  - Choose **Catalog ERM** from the **FUNCTION** menu and retrieve a resource record
  - Click the **Summary** tab for the resource record
  - From the **Summary** tab, select Related Holdings from the **View** drop-down menu

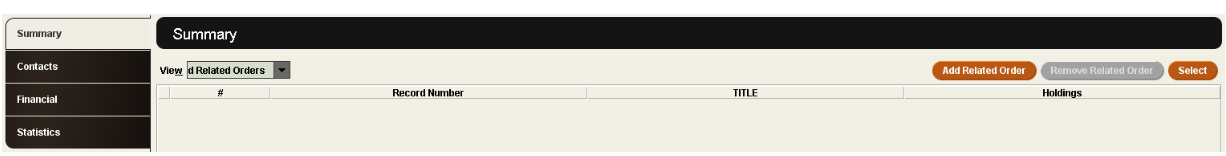
- Click the **Add Related Holding** button
  - Retrieve the holdings record and click the **Use Selected Holding** button
  - The holdings record is soft linked to the resource
  - Continue adding Related Holdings as necessary
- To soft link all holdings records in a review file to the resource:
  - From the same **Summary** tab, click **Add List of Related Holdings**
  - Select a review file to use and choose **Add**
  - The holdings records in the review file are "soft-linked" to the resource record

The batch loading feature in the **Coverage Load** function is another, and more common, way to create holdings records for the electronic records. (See below)

Related orders

To create a "soft-link" to the order record:

- Choose **Catalog ERM** from the **FUNCTION** menu and retrieve a resource record
- Click the **Summary** tab for the resource record
- From the **Summary** tab, select Related Orders from the **View** drop-down menu



- Click the **Add Related Order** button. Perform a search for the appropriate bibliographic record and highlight the line of the selected order.
- Click the **Use Selected Order** button
- The order record is soft linked to the resource

Maintaining coverage data for resources

Coverage data are stored information about your library's resource providers, titles, EISSNs, holdings for titles, access restrictions, etc. This is stored in the coverage table.

Coverage data is loaded into the coverage table using the **Coverage Load** function**.** It is possible to update coverage data by importing a text (TXT or CSV format) or XML file. The format must comply to rules specified in the documentation (see more below).

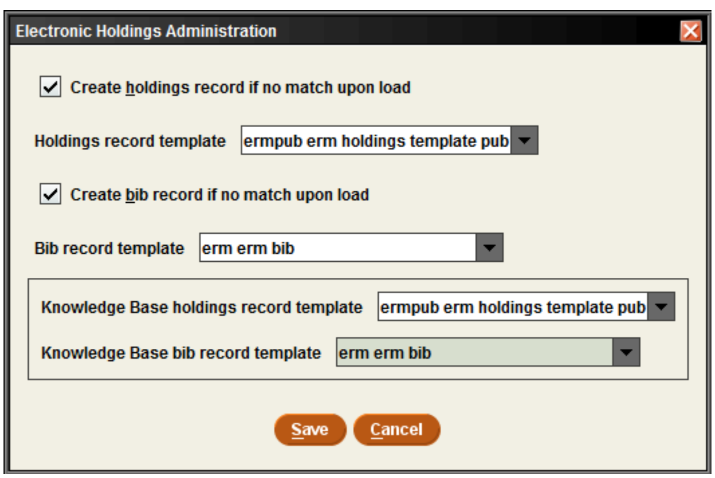
Coverage data can be edited by using the **Coverage Edit** function.

In consortial ERM, each affiliate library has a separate coverage table. Users must be associated with their respective affiliations. Users with permission can check the setup by selecting **Admin | Options | Affiliation**.

Electronic holdings administration

The coverage load process includes the option to let the system create bibliographic and holdings records for which there is no match. The Electronic Holdings Administration is used to configure options and new record templates pertinent to the creation of those new bibliographic and holdings records. If no matching record is found, these options will control if a new bibliographic or holdings record should be created, and the template that the system will use to create the necessary records.

- From the menu bar, choose **Admin | Parameters | ERM | Electronic Holdings Administration**



  - It is not possible to allow creation of bibliographic records without also allowing creation of holdings records – the check box for "Create bib …" is only available if "Create holdings …" is checked
  - The area for Knowledge Base templates refers to automatic coverage loads from Innovative's former Knowledge Base (obsolete)
  - It is recommended that designated templates are used, with coding that makes it possible to easily identify records created by a coverage load. Apart from appropriate coding, the record templates may contain variable fields with a suitable expression, for example a 9XX field in the bibliographic record, and an internal note field in the holdings record, saying something like "Record created from ERM coverage load".

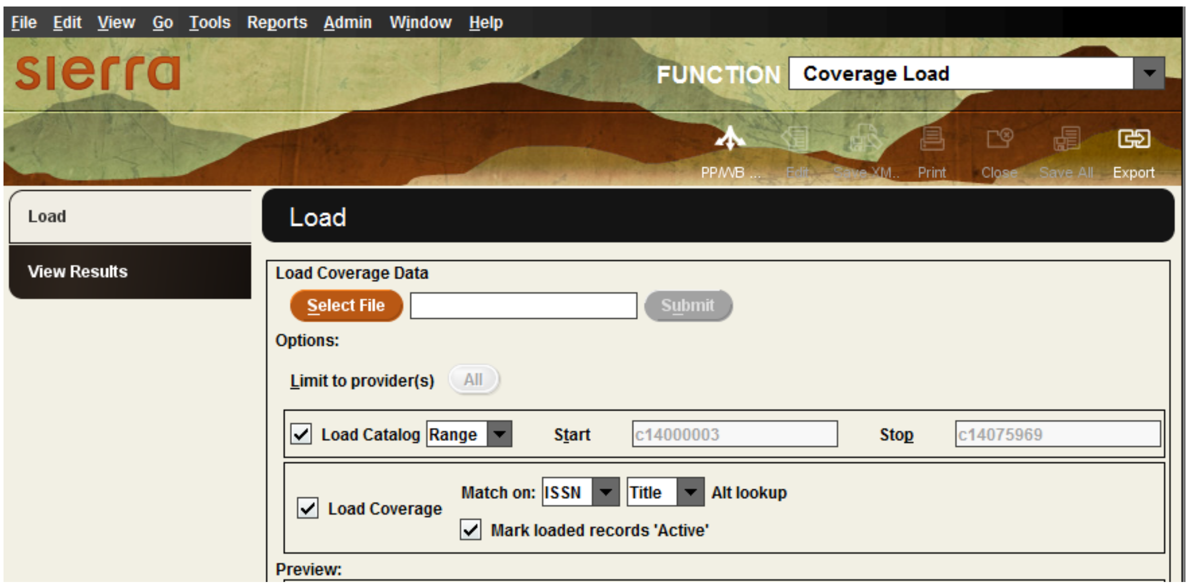
In consortial ERM, each affiliate library can have a separate setup of templates.

Loading coverage data

Use files containing coverage data to enter or update data in the coverage table, and to create bibliographic and/or holdings records in your library's catalog. The files may come from a provider, or be created locally.

Subsequent to a load of coverage data, the system will automatically "soft-link" all existing holdings records to the resource record if both records contain the same Resource ID field. The Resource ID is often identified as the Provider ID or simply Provider in the coverage file. Resource records with correct Resource ID fields must be created before any coverage load takes place. These Resource ID values must be consistently included in the records and files in order to successfully accomplish loading and updating of coverage data.

- Choose **Coverage Load** from the **FUNCTION** menu

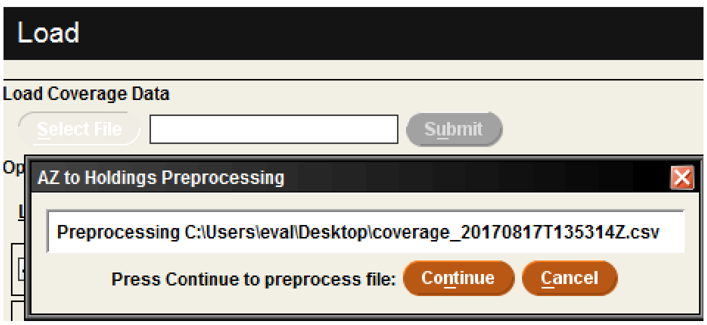


- Use the *Load Catalog* option to create brief bibliographic and/or holdings records new to the database as a result of the coverage load
  - The default match point for bibliographic records in Load Catalog is ISSN, followed by Title. Alternatively, an alternate lookup can be defined. The default index for the alternate lookup is 'o', but the library can choose another index.
    - Note: Match points used in Load Coverage does not apply in Load Catalog, only the above options are available
  - The match point for holdings records is the Resource ID field. This Resource ID field must exist in both the resource record and the associated holdings record. If no holdings record containing a matching Resource ID field exists in the database, the system will create one as specified in the Electronic Holdings Administration.
  - The default choice is to load against the whole database. This is the "Range" option. The alternative is to load against a review file of bibliographic records. This is the "Review" option – open the drop-down and change to Review and select a review file from the drop-down that appears.
    - Loading against a review file is often a good choice, in particular for initial coverage loads. This way you can limit the records the system will match against and avoid mismatches.

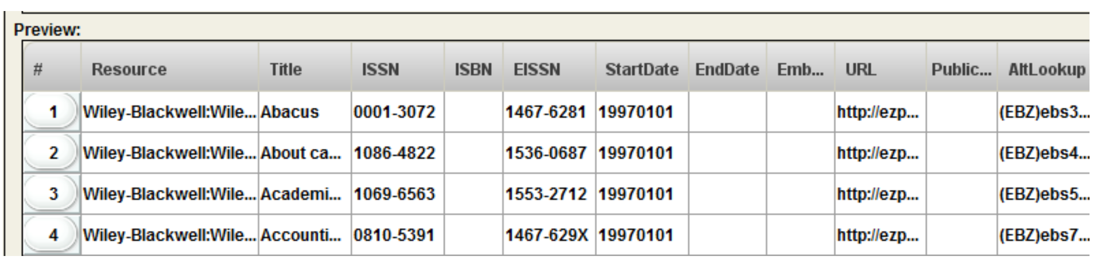
- Use the *Load Coverage* option to create and update entries in the coverage table
  - Define the match points used to find and update existing data. In Load Coverage there is more flexibility in choosing match points. An alternate lookup (ALTLOOKUP) can also be used.
  - The option for ‘Active’ records doesn’t really apply to ERM – keep the default choice. Records *not* marked as ‘active’ will not show coverage data in the public catalog, but still show the titles.

To start the loading:

- Click the **Select File** button to navigate to the coverage file you wish to load. Open the file.
  - If the file is an XML file, it will load on the screen directly. The display is preview – nothing is loaded onto the system until you “Submit”.
  - If the file is a text file, click **Continue** in the subsequent pop-up dialog. This will preprocess the file.



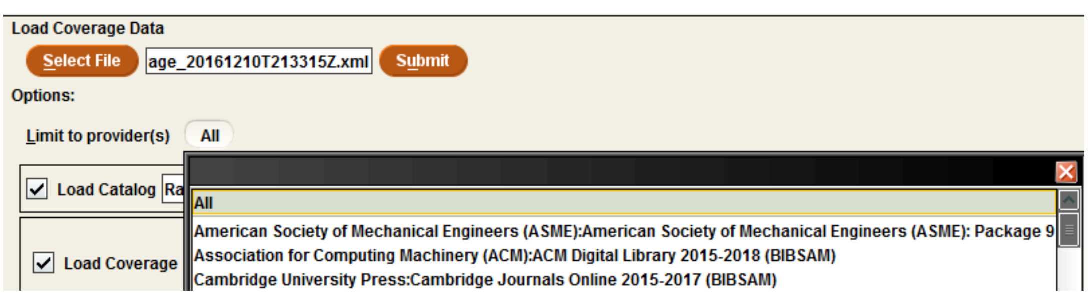
  - If there are any errors in the file, the system will show an error message at this point
- Content loaded for preview displays in columns: Resource (=Resource ID, also the same as “provider”), Title, ISSN, etc.



Preview:

#	Resource	Title	ISSN	ISBN	EISSN	StartDate	EndDate	Emb...	URL	Public...	AltLookup
1	Wiley-Blackwell:Wile...	Abacus	0001-3072		1467-6281	19970101			http://ezp...		(EBZ)ebs3...
2	Wiley-Blackwell:Wile...	About ca...	1086-4822		1536-0687	19970101			http://ezp...		(EBZ)ebs4...
3	Wiley-Blackwell:Wile...	Academi...	1069-6563		1553-2712	19970101			http://ezp...		(EBZ)ebs5...
4	Wiley-Blackwell:Wile...	Accounti...	0810-5391		1467-629X	19970101			http://ezp...		(EBZ)ebs7...

- It is possible to limit the actual load to just one, or a few, “providers” from the file. A provider corresponds to a resource record and the values are those used as Resource IDs in resource records.
  - Click the **All** button beside *Limit to provider(s)*



- Select one or more providers – use ***<Shift><click>*** to select a range, or ***<Ctrl><click>*** to make a split selection
- Click the red 'x' or click anywhere outside the box to confirm the new selection
- The preview display is updated to only show the selected providers

- Click the **Submit** button to start the load

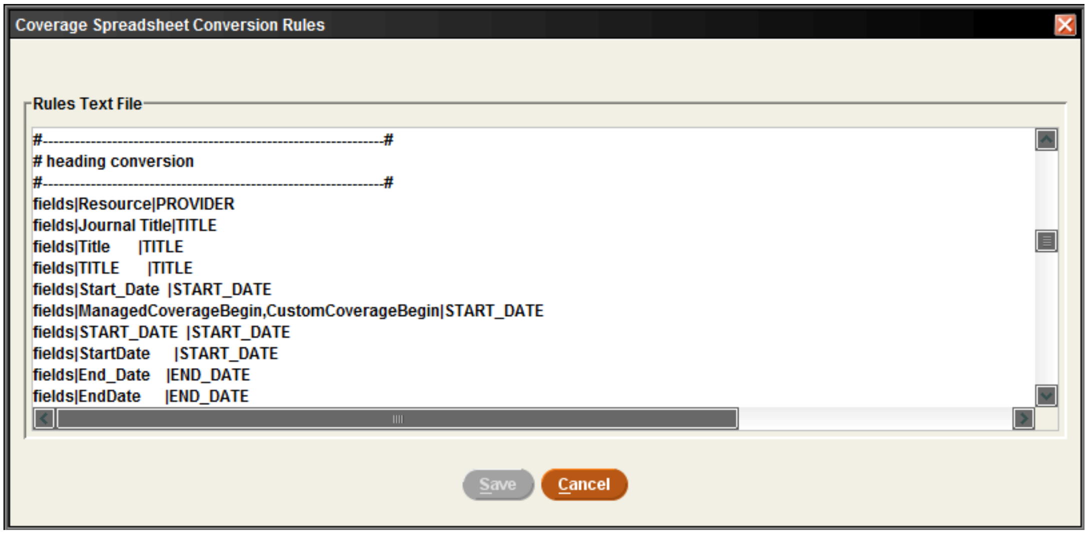
Files used in coverage load

Formatting Coverage Spreadsheets (Text Files)

- Coverage data can be loaded from coverage spreadsheets (files in TXT or CSV format).
- The coverage spreadsheet data are comprised of two types of vertical-bar-delimited entries:
  - Configuration entries – specifies the order of elements in data entries. The system identifies elements in the data by referring to the configuration entry. ***This must be the first line of the coverage spreadsheet and specified in the Coverage Spreadsheet Conversion Rules.***
    - For example: TITLE|ISSN|START_DATE|END_DATE|PROVIDER|URL|EMBARGO|ALTLOOKUP|PUBLIC_NOTE
  - Data Entries – one line of text containing information about a title. This data is not verified by the system.
    - For example: Angewandte Chemie|0570-0833|19620101||Wiley InterScience|http://www3.interscience.wiley.com/cgi-bin/jhome/106572259|3 months ago|1481137||
  - There cannot be a pipe (|) in the data entry lines in a csv file as it will be read as the start of a new cell.
  - The spreadsheets must be converted into a form readable by the Innovative system.
- The Coverage Spreadsheet Conversion Rules file is used to properly convert the file

The Coverage Spreadsheet Conversion Rules (**Admin | Parameters | General| Coverage Spreadsheet Conversion Rules**) converts data from the incoming spreadsheet for dates, provider names, and configuration entries to a format readable by the Innovative system.

There is a default file with many definitions, but it may need to be completed with local entries.



- Make note of the column headers used in your coverage files. All variations must be accounted for in "fields" entries
- Date expressions are converted to proper format in "date" entries and date format in a "datefmt" rule
  - Example: date|1 month ago |_today-1m
- Embargo expressions are defined with "embargo" entries, for example:

```
embargo|3 months|90
embargo|3 Months|90
embargo|Two Weeks|14
embargo|1 Day|1
embargo|Two and a half Years|912
```

- Resource IDs longer than 64 characters must be converted to shorter IDs in "provider" entries, for example:

```
provider|Management & Organization Studies: A SAGE Full-Text Collection (CSA) |Sage: Management & Organization Studies
```

  - The shortened ID goes into the Resource ID field in the resource record

Formatting XML files for coverage data

To import an XML file in Coverage Load, the file must follow Innovative's Electronic Holdings Update DTD. The XML file should be saved in plain text format. Innovative accepts Unicode for organizations that do not use Latin characters. Special characters in URLs should be converted to XML entity references.

How Sierra processes coverage data

View the report or save or print the report which is presented in the following tabs as a summary of the actions:

The report contains:

Catalog Updates	**Lists new records created and problems such as records not created (For example: due to multiple ISSNs)**
Coverage Updates	**History of updates to the existing coverage file (newly added or changed entries)**
Titles not in file	**History of updates to the existing coverage file (entries to remove)**
Resources not updated	**Lists all resources in the coverage table not in the current load**

When subsequent coverage data files are loaded, if there are titles missing from the file which may indicate that the library no longer subscribes to that particular title, those titles are listed in the **Titles not in file** tab.

To delete titles from this report, click in the check box, and then click the **Delete** button. The use of this delete function deletes the specific titles from the coverage file.

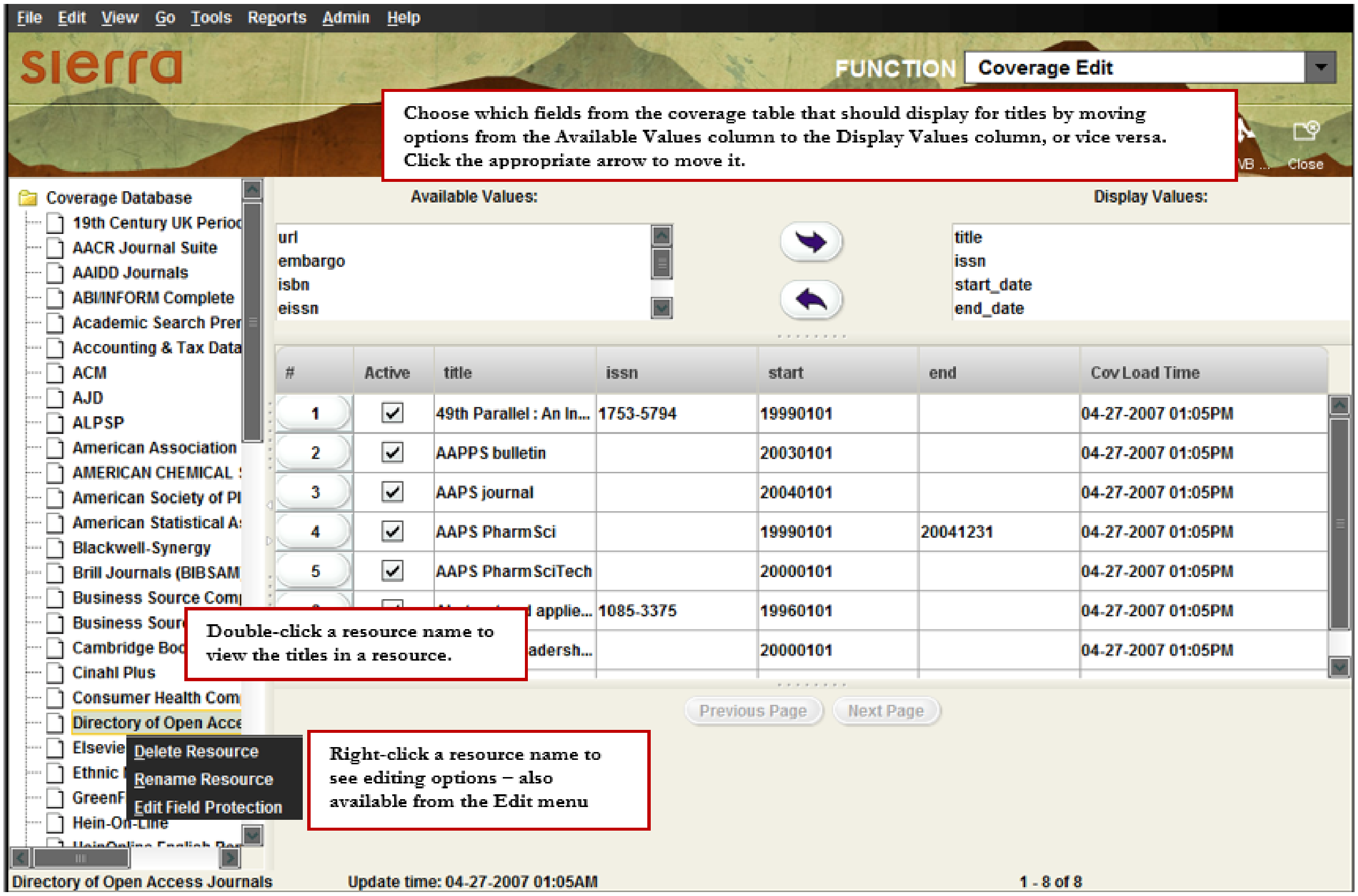
Titles are then removed from the coverage database AND the holdings records are compiled and placed into a system generated review file labeled **Delete Candidates.** This review file contains holdings records and bibliographic titles to which the library no longer subscribes, as indicated by their absence from the recently-loaded coverage file. To access this file, navigate to **Create Lists**, choose an empty review file, select the **Copy** icon, scroll to the bottom of the listed files, and select the file labeled **Delete Candidates**. These holdings records may then be deleted one by one from the review file or by navigating to the **Delete Records** function.

Editing the coverage table

The coverage table contains data about your resources (also called databases). Each entry in the coverage table describes a title in a resource. This table is edited in the **Coverage Edit** function. Here you can:

- rename resources
- delete resources
- edit fields in titles
- suppress titles without deleting their coverage data
- delete titles
- protect fields in a resource when updating the coverage table from a file

See Maintaining Coverage Data for Resources in the Sierra documentation for details of how data is stored in this table.



To edit data for titles in a resource, select the title by clicking it and then use icons on the toolbar, or right-click to select options to edit or delete a title.

ERM for consortia

With ERM for Consortia, there are multiple coverage tables, one for each participating library. Each participating library is assigned an **Affiliation Code**. To associate the Sierra user with a specific coverage table, select **Admin | Options | Affiliation** and select the affiliation in the drop-down. The login must have permission to edit Options to do this. (Options are otherwise administered in the user administration in the Admin App by authorized staff)

NOTE: Sierra logins are assigned an acquisitions/serials unit. This unit must match the affiliation code when loading coverage so that holdings records are created for the correct serials unit.

- When creating resource records, add an Affiliation variable field to each record when coverage will be loaded for that resource. (It is often useful to include the Affiliation field already predefined in resource record templates)
- The Affiliation field must also exist in holdings records used with ERM. Include it in the holdings record templates that are used for coverage load catalog updates. Each affiliation can have their own setup in Electronic Holdings Administration: **Admin | Parameters | ERM | Electronic Holdings Administration**

With ERM for Consortia, there is also an additional fixed field for Location code. Resource records can be scoped.

License records can be associated with license units. If license units are created, staff members in one unit cannot view or edit records in the record range belonging to another unit.

ERM and public display

It is up to the library to decide what ERM related content to display in the public catalog. Fields from resource and license records can be made public, as well as related holdings for a resource record. Related holdings can also display in the bibliographic record they belong to and can optionally link back to the resource record.

Individual records of any type can be suppressed from public display by using suppression codes in a fixed field in the respective record type.

Making indexing decisions is part of the ERM implementation. By default, resource names and alternate names are indexed in a Resource Name index, and also in the Keyword index. The Resource Name index can be offered from drop-down search options in the WebPAC. The resource name search help page can also be used as an option to search and browse resources by resource name and subject.

A resource subject index can be set up and offered as a search option in WebPAC. This usually appears as a drop-down list of subject options on the resource name search help page, rather than an option to search subject terms as free text. This is because resource subjects are usually a short list of general topic areas, more suitable to browsing than to searching.

Resource names and alternate names can also be included in the Title index, so they are retrieved at the same time as bibliographic record results. The resource subject should not be indexed in the general subject index, because this is a differently configured type of subject than MARC subject headings.

Encore is based on keyword searching only, so the library may want to think about keyword indexing of resource subjects. Other fields can also be keyword indexed if desired. Some libraries want to index the Description field for example.

Configuring WebPAC display

Display of resource record fields is controlled in a similar manner as bibliographic record display: fields are defined in the webpub.def file and taken into use by configuring tokens on the resource record display form (resource_display.html). There is also a brief citation resource record form (briefcit_resource.html) for configuration of resource record display in a search browse.

License record information will display in WebPAC by configuring Web Options.

- If more than one license record is attached to a resource record, the system determines which license to use for display by using the value of OPAC option License record status field and active value. This is normally the Status field (field # 214) with value '-', but multiple field/value pairs can be used.

The list of related holdings records can display in the WebPAC as associated records in conjunction with the resource record display, and would include coverage dates, a link to the bibliographic record and a link to the title/e-journal itself. This can be customized using Web Options.

Holdings records with coverage data can also display in the bibliographic records they are attached to. The display normally includes coverage dates, a link to the resource record and a link to the title/e-journal itself. Additionally, this display might include selected fields from license records. This can be customized using Web Options.

- The Public Note field from the resource record (field group 'f') can be used to specify a generic hyperlink text for all title/e-journal links for the related holdings associated with the resource record. This is set with OPAC option Checkin Record: Resource record field to use for 856 link text.

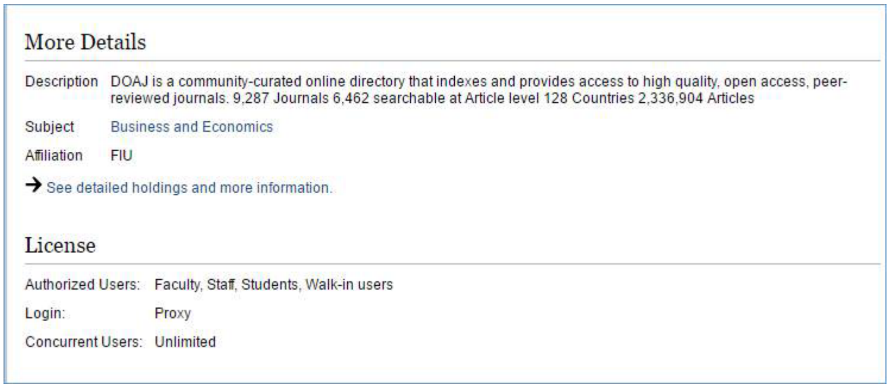
Here is list of current Electronic Resource Management options with sample values. Options starting with BIB refer to bibliographic display, options starting with RESOURCE refer to resource record display. For additional information, see the Sierra documentation.

- BIB_LICENSE_FIELDS=Permitted:Vlw|Restricted:Vlx
- BIB_LICENSE_FIELDS_BRIEF=Actions allowed: Vlw|Restrictions:Vlx
- BIB_RESOURCE_CAPTION=This title is available electronically via:
- BIB_RESOURCE_FIELDS=:VeT|:VeE|:Vek
- BIB_RESOURCE_FIELDS_BRIEF=:VcY|:Vch|:VeE
- BIB_RESOURCE_NUM_BRIEF=A
- ICON_BIB_RESOURCE_DETAILS=
- ICON_RESOURCE_RECORD=
- # ICON_VIEW_ADDITIONAL_ITEMS=
- RESOURCE_ADVISORY=k
- RESOURCE_HOLDINGS_FIELDS=Title:VbT|Coverage:Vch|Full Text:VcY
- RESOURCE_HOLDINGS_MAX
- RESOURCE_LICENSE_FIELDS=Permitted:Vlw|Restricted:Vlx|Available to:Vlf|Access notes:Vla
- TABLEPARAM_BIB_LICENSE=width="100%" border="0" cellpadding="2"
- TABLEPARAM_BIB_RESOURCE=border="0" cellspacing="1" cellpadding="2"
- TABLEPARAM_BIB_RESOURCE_BRIEF=border="0" cellspacing="1" cellpadding="2"
- TABLEPARAM_RESOURCE_BIB=width="100%" border="0" cellpadding="2"
- TABLEPARAM_RESOURCE_LICENSE=width="100%" border="0" cellpadding="2"
- TABLEPARAM_RESOURCE_RESOURCE=width="100%" border="0" cellspacing="1" cellpadding="2"

Configuring Encore display

Select fields from resource and license records can be displayed in Encore. The configuration is made by Innovative upon request. This can be done during implementation or at any time afterwards by contacting Support.

- The OPAC options mentioned above need to be replicated in Encore. Request from your implementation team or contact Support.



However, the list of related holdings records cannot display directly in Encore. Instead a link to "*See detailed holdings and more information*" will redirect to the resource record in WebPAC. This link can be suppressed if desired.

- The link text can be customized in Encore Messages.

Bibliographic records in Encore can display coverage data in the browse screen as well as in the full record display.

Browse display example:

Full record display example:

ACM computing surveys

E-journal | ACM | 1969-

Available Online

ACM
01 Mar. 1969 - 30 Apr. 2015
more info

BSU
01 Mar. 2004-
more info

Details

Published	New York : ACM, 1969-
Subject	Electronic digital computers -- Periodicals