The Holdings module was built to help manage holdings and URL information for the databases and journals in the Gold Rush database. There are two sections in the Holdings Module, *Database Holdings* and *Journal Holdings*. Use the Holdings Module to populate your public Gold Rush interface as well as GR Linker (OpenURL Resolver).

Holdings-Database Holdings

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Holdings-Database Holdings

The following functions are available in the Database Holdings section:

*Add Gold Rush Database to My Holdings
*Manage Database URL's
*Full Provider/Database Table
*Remove Database from My Holdings
*Manage Database Dates

Add Gold Rush Database to My Holdings

Use this when you have just purchased a brand new database or to initially populate your holdings. You will need to know the database name, the Provider name and the database URL your library uses.

1. Select Holdings from the main menu.

2. Click on the 'Add Gold Rush Database to my Holdings' link on the Holdings menu.

3. Enter the appropriate Provider/Database combo. Click the “Continue” button.

4. The Provider and database name will be displayed along with any default database URL found for this particular database.
If there is no URL displayed, enter the URL you will be using to send people to this resource and click the "Continue" button. Remember to include the http:// part of the URL.

If there is a URL displayed, you can edit the URL to reflect the appropriate URL for your site (you may use a proxy address or some other authorizing URL) or you can accept the existing URL. Once the URL displayed is correct, click the "Continue" button.

If you use a proxy server, and you have entered your proxy server information in the Settings -> Manage Targets and Proxy Server menu, you can check the "Use Proxy Wrapper" checkbox, and Gold Rush will automatically add your proxy server to the URL.

Or, you can enter the URL with your proxy server address, and uncheck the "Use Proxy Wrapper" checkbox.

6. You will now see the Review screen which re-displays the information you have just entered. If everything looks correct, click the "Continue" button. If the information is not correct you can abort the process by clicking the "Cancel" button or clicking on one of the main menu items or the links in the Current Location Bar.

7. The final screen is your confirmation that the information entered was written to the database. If you have more new databases, you can click on the "Add Another DB" button. You can exit this process by clicking on any of the menu items at the top of the screen or by using the links in the Current Location Bar.
**Manage Database URL's**

Use this menu item to update current database URLs for your library. This URL is used for any database links in the public interface and also used for all individual journal title URL's if there are not title-specific URL's available. (View online tutorial of this function at: http://grweb.coalliance.org/videos/ChangeDBURL_demo.htm)

1. Select Holdings from the main menu.

2. Click on the 'Manage Database URL's' link on the Holdings menu.

   ![Database Holding Menu]

   - **Add Gold Rush Database to Holdings**
   - **Manage Database URL's**

3. Enter the appropriate Provider/Database combo. Click the "Continue" button.

   ![Database 1 Selection Form]

   **NEW:** To choose a Provider and/or Database, begin typing the name in the Provider/Database field and a selection list will automatically be provided to you.

   **Provider/Database:**  
   - ELSEVIER: ScienceDirect

   ![Add/Edit Database URL Form]

   **Provider:** ELSEVIER  
   **Database:** ScienceDirect  
   **Database URL:** http://www.sciencedirect.com/

4. Edit the URL information in the Database URL field in the Add/Edit Database URL Form (this field must start with http://) and click the "Continue" button.

5. You will now see the Review screen which is re-displaying the information you have just entered. If everything looks correct, click the "Continue" button. If the information is not correct you can abort the process by clicking the "Cancel" button or clicking on one of the main menu items or the links in the Current Location Bar.
7. The final screen is your confirmation that the information entered was written to the database. If you have more URL's to change, you can click on the "Manage DB URL's" button or you can return to the module menu by clicking the "Holdings Menu" button. You can exit this process by clicking on any of the menu items at the top of the screen or by using the links in the Current Location Bar.
Full Provider/Database Table

This menu item displays the Providers included in Gold Rush and the databases associated with each Provider. It is only a report, you can not edit the data in Gold Rush through this menu option.

1. Select Holdings from the main menu.

2. Click on the 'Full Provider/Database Table' link on the Holdings menu.

3. The table includes the Provider name and the database names associated with those Providers in Gold Rush.

4. If you wish to save the report shown on the screen, click the button on the top bar of the Chart. This will bring up the list in an Excel-like screen. To save the information, go to the File Menu on your browser and select "Save as...". You should now see a dialog box that will allow you to name and save the information on your screen in a variety of file types, including html, Excel, etc. You can get back to your Gold Rush Report using your Back Button.

<table>
<thead>
<tr>
<th>Provider - Database List</th>
<th>Download</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td>Database</td>
</tr>
<tr>
<td>ABC-CLIO</td>
<td>America: History and Life</td>
</tr>
<tr>
<td>ABC-CLIO</td>
<td>Historical Abstracts</td>
</tr>
<tr>
<td>AMERICAN CHEMICAL SOCIETY</td>
<td>American Chemical Society (ACS) Publications</td>
</tr>
<tr>
<td>American Statistical Association</td>
<td>Current Index to Statistics</td>
</tr>
</tbody>
</table>
Remove Database from My Holdings

Use this menu item to remove your library's holdings when you have cancelled a subscription to a specific database.

1. Select Holdings from the main menu.

2. Click on the "Remove Database from My Holdings" link on the Holdings menu.

3. Enter the appropriate Provider/Database combo. Click the “Continue” button.

4. You will now see the Review screen which is re-displaying the information about the database you are deleting. You can click the "Cancel" button and return to the Holdings menu or if you are sure you want to delete the database, click the "Continue" button.

5. The final screen is your confirmation that the database has been deleted from your holdings. If you have more databases to delete, you can click on the "Delete Another DB" button. You can exit this process by clicking on any of the menu items at the top of the screen or by using the links in the Current Location Bar.
Manage Database Dates

This option can be used to make global changes to a date or note field of a database. (View online tutorial of this function at: http://grweb.coalliance.org/videos/Database_Dates_demo.htm)

1. Select Manage Database Dates from the Holdings module.
2. Enter the appropriate Provider/Database combo. Click the “Continue” button.

3. The Database Dates form will appear.

4. Data entered in the fields of this form will cascade to every title in the database. For example, if you enter full text start and end dates in this form, these same set of dates will display on every title in this database in the
public interface. This form can be also be used to make global changes to embargos, windows and date notes.

5. Be sure to click on the gray “set” button next to each field after making a change.

**Holdings-Journal Holdings**

The following functions are available in the Journal Holdings section:

*Manage Journal URL's
*Manage Journal Dates

**Manage Journal URL's**

Use this menu item to update current journal URLs for your library. This URL is used for any journal links in the public interface. Not all databases have journal level URL's, those that do not utilize the default database URL for the individual title URL. (View online tutorial of this function at: [http://grweb.coalliance.org/videos/JURL_Update_Aug_2010_demo.htm](http://grweb.coalliance.org/videos/JURL_Update_Aug_2010_demo.htm)

If you have a number of updates to make or if you have overall changes you need to make to journal level URL's, please contact the Colorado Alliance regarding the possible loading of URL data or programmatic updates.

1. Select Holdings from the main menu.

2. Click on the 'Manage Journal URL's' link on the Holdings menu.

3. Enter the appropriate Provider/Database combo. Click the “Continue” button.

4. The entire journal title list for the database you selected will be displayed. The display includes:
5. Use the gray buttons at the top of the table to make global changes to the list. For example, if you wish to apply the proxy to all titles in the list, select “Use Proxy on All”.

6. You can edit the URL for individual titles. Each time you make a change, click on the "Update" button to the right of that title to save your changes.

7. Use the hide button to display or remove a journal from the public interface. Hide serves the same function as delete.

8. You can edit the Use Proxy setting by changing the value in that column for
any individual journal, or all journals displayed on this page. If set to “Y”, Gold Rush will automatically add your proxy server’s address to the URL entered in the JTurl field.

**Note:** be sure that the proxy is entered in the Settings module under Manage Targets and Proxy Server before adding a proxy to a journal or database.

8. You can lock the title so that the title is untouched when the database is globally updated. There is no need to lock titles in aggregator databases as all libraries receive the same titles and these databases are centrally updated.

9. If you have made any changes, be sure to click the “Update” button before moving to another page.

10. If you wish to save the report shown on the screen, click the button on the top bar of the Chart. This will bring up the list in an Excel-like screen. To save the information, go to the File Menu on your browser and select "Save as...". You should now see a dialog box that will allow you to name and save the information on your screen in a variety of file types, including html, Excel, etc. You can get back to your Gold Rush Report using your Back Button.

### Manage Journal Dates

Use this menu item to change the date of a journal in a database. (View online tutorial of this function at: [http://grweb.coalliance.org/videos/Journal_Dates_demo.htm](http://grweb.coalliance.org/videos/Journal_Dates_demo.htm))

If you need to make changes to several journals, it may be more efficient to use Match Titles under the Title Lists menu option. Contact the CO Alliance for assistance in using Match Titles.

1. Select Holdings from the main menu.

2. Click on the 'Manage Journal Dates link on the Holdings menu.

3. Enter the appropriate Provider/Database combo. Click the “Continue” button.
4. The entire journal title list for the database you selected will be displayed. The display includes:

- Alphabet Navigation Bar
- Journal title and ISSN
- Full text start
- Full text end
- Citation start
- Citation end
- Date notes
- Embargo months
- Window months
- Journal format
- Update
5. Use this form to make individual changes to dates, *windows, embargos, and journal format. If you need to make changes to several journals, it may be more efficient to use Match Titles under the Title Lists menu option. Contact the CO Alliance for assistance in using Match Titles.

   * The “window” field is rarely used. This is almost the opposite of embargo. This means that you have immediate access to a journal for an initial period of months and then lose access to it.

6. If you enter an end date, be sure to also use a begin date. Use current or leave the end date blank to indicate the publication is ongoing. If you add an embargo or window, be sure to leave the end date blank so that Gold Rush will properly calculate the coverage dates. Select a journal format so that the journal displays in the proper area of the public interface. For example, select “local holding” for a journal in the library’s print holdings. Be sure to click update to save changes to the record.
Match titles

Match titles allows you to make batch changes to particular fields within an existing database. For example, perhaps you have added the generic Springer list to your holdings. This list may have 2,000 titles and the maximum coverage dates for each title. Perhaps your library subscribes to 500 journals from Springer and the coverage dates vary on each journal. If you are able to get a title list from Springer that has ISSNs, titles and your actual coverage dates, you can use the Match Titles function to update the generic Springer list with the changes on the customized list. The Match Titles process will look for a match on the ISSN number, if a match is found between the two lists, it will override the dates of the generic list with the dates of the customized list and display the title. In cases when there is no match on ISSN, the title is hidden. After the Match Title process completes, the list will display the Springer journals to which your library subscribes with the appropriate coverage dates. You can use match titles to make batch changes to any number of fields in a spreadsheet. For assistance using Match Titles, contact the CO Alliance.

Upload a Title List (New or Existing)

(View the online tutorial for this function at: http://grweb.coalliance.org/videos/Upload_Holdings_demo.htm )

1. From the Holdings module go to Title Lists and click on the menu option Upload a Title List.

2. From the Provider selection form, select the appropriate provider, or create a new one. Click the “Continue” button.
3. Select the appropriate database, or create a new one. Then click on the “Continue” button.

A form will appear with the following fields:
- Requested by
- Report email address
- Hide
- Use Proxy
- Database URL
- General notes
- Number of columns

2. Complete the form.
   - Be sure to keep hide set at No so that titles will appear in the public interface.
   - Use Proxy should be checked if you use a proxy server for authentication. Set the proxy to No if you use a VPN for authentication or if this is an open access resource.
   - The database URL is the URL that will display in the public interface when someone tries to access this database.
The number of columns corresponds to the number of columns in the spreadsheet that will be uploaded. Be sure that the spreadsheet has been saved as a text file. The first row of data must always be header fields: title, issn, dates, etc.

Criteria for uploading a spreadsheet:
- First row is reserved for header data. There should be nothing above the first row.
- You must have at least a title and ISSN to upload a title list or enter a title in Gold Rush.
- Enter metadata on the 2nd row. Don’t skip any rows on the spreadsheet.
- Be sure to save the spreadsheet as a text file with the extension “txt” before uploading the title list.
- If there are columns on the spreadsheet that contain data you don’t want to upload, select SKIP on the form loader for these columns.
- Do not include any footer information on the spreadsheet.

3. After completing the form, click the “Continue” button. The form will then be expanded so that you can map each field on the form to the spreadsheet. Each column on the form corresponds to the same column letter on the spreadsheet. Map the columns on the form to the spreadsheet.
3. Enter a designated date format or select none if there is no date.

4. Select the appropriate journal format for the type of database you are uploading. ***NOTE: Be sure to select a format, so that the journal displays in the appropriate place in the public interface.

Note**: Custom code is rarely used. This feature is used if you are uploading a title list that uses a special perl script to create journal URLs.

5. After completing the form, click “continue” once more.

6. Click on the “upload a title list file” field at the bottom of the form. Select the browse button to pick the appropriate title list from your computer.
7. Once the file has been uploaded, enter a number of records to test in the “test records” field at the bottom of the screen. 25 is usually a good number. Errors from test record are in red. Even if you enter a limited number of test records, such as 5, Gold Rush scans the entire database for errors. Errors will appear in the record itself, or at the bottom of the screen.
8. If there is an error, you will be prompted to run more test records. You must fix the errors before the file can be run. Errors will be on the spreadsheet or the loader form. Some common errors include incorrect mapping between spreadsheet and loader form, not including an issn for a journal, bad date format, text included on spreadsheet above the header, uploading the wrong type of file (e.g. xls instead of txt)

9. Once you have successfully uploaded a file and tested the records, the file will be staged to load and should be available in your holdings and the public interface the next morning.

Add a Journal to a New or Existing List

1. From the Holdings module under the Title list section click on the menu item link, “add a journal to a new or existing title list”. Select an existing provider or create a new one. Click the “continue” button.

2. Select the appropriate provider from the Provider Selection Form, or create a new one.
3. Select the appropriate database from the Database Selection Form, or create a new one.

- After you click continue, a form will appear with the following fields: title, issn, eissn, journal format, full text start, full text end, citation start, citation end, date note, embargo period, window period, journal URL, open access journal, hide, use proxy, lock this title.

4. At minimum, you must enter a title and ISSN. Under journal format, be sure to select the appropriate date format so that the journal displays in the proper section of the public interface. If you enter an embargo or window, leave the full text end field blank so that Gold Rush can properly calculate coverage dates. When finished click on the “add” button.

If you choose yes to lock title, the record will not be touched when the list is globally updated. We do not make changes to titles on publisher lists, only aggregator lists where all sites get the same titles.

***NOTE: Be sure to select no for “Use Proxy” if the journal is open access or your library does not use a proxy server to authenticate.

Once the form is completed and you have clicked on the “add” button, there will be a confirmation that the journal was successfully added.
4. When finished updating the record, select add and the title will immediately be added to the database and the public interface.

***NOTE: If you can’t find a title in the public or staff interface after it is added, try searching by the ISSN. It’s possible that the item was added, but under the main entry title. Also, be sure that the title is not hidden. This setting is under manage journal URLs.