

Flat File Import Guide

The Flat File Import feature is accessed from eReserve > Readings > Import > Flat File Archive

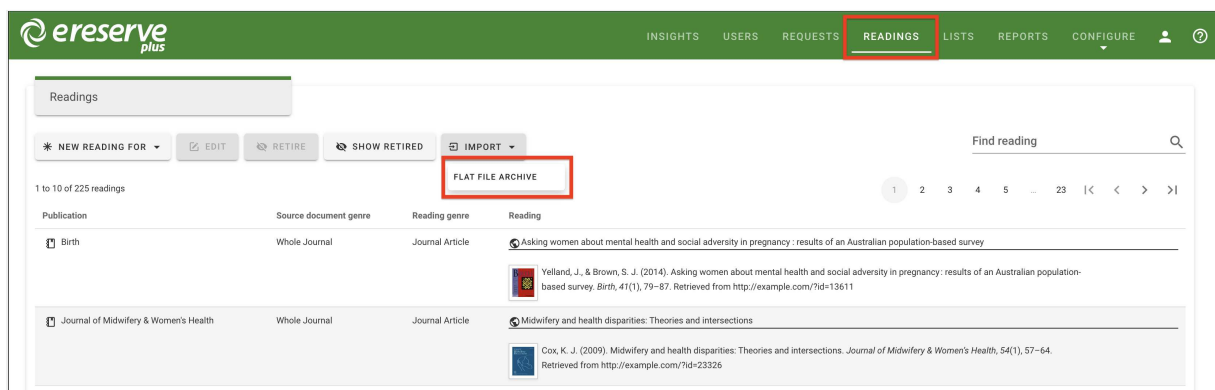


Figure 1: Flat File Import

Purpose of this document

This document provides details on how to use the function for Library and Support Staff. Should you require additional assistance please do not hesitate to contact the eReserve Support Team at support@ereserve.com.au and a technical representative will contact you to assist. When contacting eReserve Support, please provide the Flat File Import email confirmation to help us troubleshoot any issues you may be experiencing.

Types of Flat File Import

The Flat File Import function is primarily used for importing data from legacy systems into eReserve Plus. There are 3 types of data imports:

- **Courses:** Create a set of Courses or Subjects to match the Learning Management System in eReserve Plus using the Course Import

- **Readings:** Core resource records within eReserve Plus are called Readings. This import enables the creation of the metadata and upload of files to Cloud Storage. The import definition for Readings is strict and requires that data meets the eReserve validation rules for each kind of Reading (i.e. Books, Journal Articles, Websites etc)
- **Requests:** The Requests import definition enables the creation of Readings, Requests and Reading Lists in one process.

Pre-requisites

There are a number of pre-requisites required before attempting a flat file import of data. These are outlined for each type of import, however all imports rely on the following setup:

1. Schools: The list of Schools will already need to have been configured. To check whether Schools are implemented, visit Configuration > Schools
2. File Preparation: The Flat File Import function provides a single mechanism to import data and resources however a different set of files must be prepared for each type of import. Understanding the file preparation of the import folder - called the Archive in eReserve Plus - will ensure data can be ingested more easily. Each import will have its own Archive folder setup which is explained in further detail for each type of import. The Archive folder may consist of at least 2 of 3 files/folders:

A Data File: This is a CSV file in a UTF-8 file format. Filename = import_records.csv

and

A Mapping File: This is a YAML file which references the data to map it to the correct fields. Filename = csv_to_document_mapping.yml

and (optionally)

A Resource Folder: Is a folder which should contain any physical files (e.g. PDFs, MGPs, JPGs etc) referenced in the Data File. All resources should be saved into the Resources folder with each file saved with its reference in the Data File. e.g. thedish.pdf

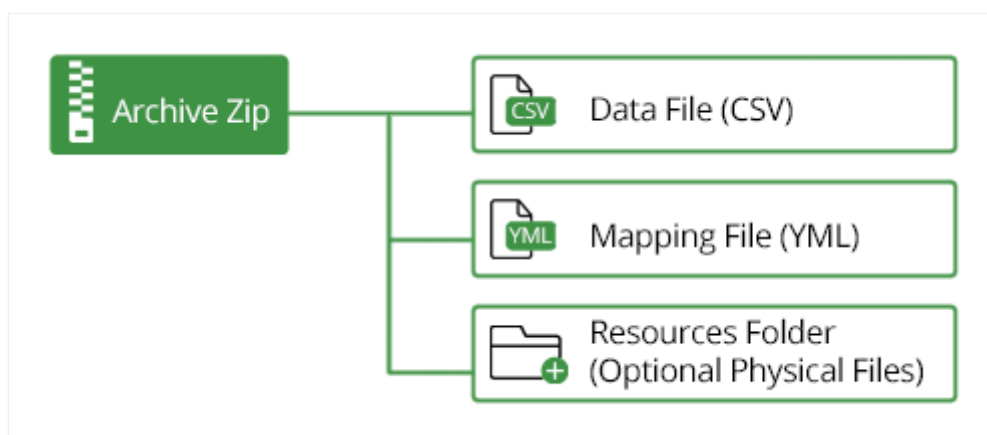


Figure 2: Archived Contents

Please Note: The filenames in the archive zip must be named exactly as outlined above for the single import mechanism to recognise them.

All Archive folders will include at least one CSV file. CSV files come with some caveats:

- a. UTF-8 is the file format to be used with eReserve Plus, otherwise import issues may occur. If assistance is required for converting the CSV file to UTF-8 format.
- b. Microsoft Excel has auto-formatting feature and may cause formatting problems with a CSV file. For example a page number is seen to be a date where the value of the field will be automatically formatted to look like a date. To avoid these issues consider using <http://www.libreoffice.org> as an alternative means to edit CSV files.
- c. Ensure there are no line returns in column data in the CSV file. There should only be line returns at the end of each row.

d. Double quotes are used by eReserve Plus for text columns. Please ensure that single quotes are used throughout all column data.

e. All column titles will need to be in lower case format for the Flat File Import to be successful.

f. If a mandatory field is required you must provide a value. If a field is not mandatory, you can leave it blank.

Row Reference

The column `__ref_id__` can be added to either of the Flat File Imports, as an optional column, which can be used to assign a reference number to all resources in a flat file.

	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
1	Edition	volume	issue	pages	count_kind	creation_method	reading_kind	unit	reading_list_duration	teaching_session_code	reading_list_locate_mode	reading_importance	requester_email	ref_id
2	1			unknown	W	another	link	ABC123	predefined	TS6	find_or_create	recommended	first.last@ereserve.com.au	4
3	3			unknown	W	another	link	ABC123	predefined	TS6	find_or_create	recommended	first.last@ereserve.com.au	5
4				1W		another	link	ABC123	predefined	TS6	find_or_create	recommended	first.last@ereserve.com.au	6
5	1			unknown	W	another	link	ABC123	predefined	TS6	find_or_create	recommended	first.last@ereserve.com.au	7
6	2			unknown	W	another	link	ABC123	predefined	TS6	find_or_create	recommended	first.last@ereserve.com.au	8
7	2			unknown	W	another	link	ABC123	predefined	TS6	find_or_create	recommended	first.last@ereserve.com.au	9
8	3			unknown	W	another	link	ABC123	predefined	TS6	find_or_create	recommended	first.last@ereserve.com.au	10
9	1			unknown	W	another	link	ABC123	predefined	TS6	find_or_create	recommended	first.last@ereserve.com.au	11
10	2			unknown	W	another	link	ABC123	predefined	TS6	find_or_create	recommended	first.last@ereserve.com.au	12
11														

Figure 3: New Column within Flat File Import

This reference number is displayed next to the row number in an Import Complete email when an error occurs.

Hello Default

The import you requested has now been completed. Following are the details: The error ref_id.zip import failed with the following errors:

Row #: **ref_id:4** errors occurred

1. VALIDATION ERROR: Found the following Document::Request::BookPart errors when processing: Schedule Sorry but this reading is already on your reading list for the dates requested. Please choose another reading or dates of availability outside of 29/09/2022 to 28/02/2023

Figure 4: Ref ID within email

The `__ref_id__` provides a consistent method of referring to a resource in a flat file. It remains the same for each resource allowing you to easily refer back to resources after amendments to your flat file. This is particularly useful when import large numbers of resources.

1. Course Import

The list of Courses or Subjects must first exist as a unique Course record within eReserve Plus for Request records and Reading Lists to be linked to.

The preferred approach to adding a Course into eReserve Plus is for an Academic to activate their course the first time they access eReserve Plus via an LTI link in the Learning Management System (LMS). To activate a new course the Academic follows a simple process of selecting a School and Citation Style and clicking Update. Once the Course is activated then eReserve Plus knows about the new Course and materials can be added by Library Staff on behalf of the Academic in the Admin interface, depending on the operational model.

However, during the Project setup phase or where time constraints are imposed on course activation via LTI link, the Course Import is essential to fast-track the creation of Readings and Requests in eReserve Plus. Courses are imported with a CSV file and a corresponding mapping file.

1.1 Pre-requisites

1. The Archive folder will need to be prepared as a .zip folder which should contain the following elements:

- a. The Data File: This is a CSV file in a UTF8 file format - Filename = import_records.csv
- b. The Mapping File: This is a YAML file which references the data to map it to the correct fields in eReserve Plus - Filename = csv_to_document_mapping.yml

The templates and a sample dataset are available for use [here](#)

1.2 Mandatory Data

The import_records.csv file will populate eReserve Plus with Course Codes, Descriptions and School Associations.

Column Name	Description	Type	Format Values
source_document_kind	This column describes the kind of document being imported. When importing courses this should be set to limited_session	text	limited_session
school_name	This column is used to associate a course with a school. Which is used for utilisation reports.	text	e.g. School of Arts and Social Sciences
code	This column is where you specify the unique course code as it will be stored in eReserve Plus.	text	e.g. CS101 (with course code filter) OR CS101_s2_2018 (without course code filter)
name	This column is used to specify the long name of the course. Typically, this is the name as it is displayed to academic and students.	text	e.g. Introduction to Computational Theory

2. Readings Import

The materials within eReserve Plus are called Readings. Each Reading displayed by eReserve Plus is a combination of a citation and bibliography. The citation is shown as the title of the reading and when clicked the bibliographic reference is displayed.

Readings are imported with link references in a CSV file, a mapping file, and a folder containing the physical files. The physical files are uploaded to Cloud Storage.

The import definition for Readings is strict and requires that data meets the eReserve validation rules for each kind of Reading (i.e. Books, Journal Articles, Websites, Motion Picture etc).

2.1 Pre-requisites

1.The Archive folder will need to be prepared as a .zip file which should contain the following elements:

- a. The Data File: This is a CSV file in a UTF-8 file format - Filename = import_records.csv
- b.The Mapping File: This is a YAML file which references the data to map it to the correct files - Filename = csv_to_document_mapping.yml
- c. The Resource Folder: This is a folder which should contain any physical files (e.g. PDFs, MGPs, JPG etc) referenced in the Data File. All resources should be saved with its reference in the Data File. e.g. thedish.pdf

The templates and a sample dataset for each genre are available for use [here](#)

2.2 Mandatory Data

The columns for the Data File can vary depending on the legacy data, however as a minimum it should contain the following:

Column	Description	Type	Suggested Value
source_document_title	The title of the source document	Text	Data Dictionary
source_document_kind	The kind of source document associated with the reading (e.g. book, journal, etc.)	Text	Data Dictionary
source_document_licence	The licence for the source document	Text	Data Dictionary
source_document_genre	The genre for the source document (e.g. book, conference, report, legal case, etc)	Text	Data Dictionary
reading_title	The title of a reading	Text	Data Dictionary
reading_genre	The genre of the reading itself (e.g. chapter, journal article, legal article, etc.)	Text	Data Dictionary
reading_kind	Denotes whether the reading is a FILE or a LINK or needs to be located	Text	Data Dictionary
reading_reference	The file or link associated with the reading	Text	Data Dictionary
supplied_total_pages		Text	

Column	Description	Type	Suggested Value
	The total page count for the Source Document. This field is required for file-based book resources if the Mandatory Total Page count feature is enabled		Data Dictionary

These columns dictate how Readings are rendered in eReserve Plus and form the basis for copyright conflict detection.

2.3 Additional data requirements

Depending on the combination of the `source_document_kind`, `source_document_genre` and `reading_genre` there will be other required columns. There are also a number of optional columns which can enhance the metadata in eReserve Plus once imported. This optional metadata can be explored [required_fields_for_flat_file_import](#).

3. Requests Import

eReserve Plus enables the scheduling of Readings via Request records, typically from Academics. A Request adds start and end dates to Readings so that they are processed through a workflow for approval to be added to the Reading List, for the correct duration. Readings Lists are served up to Students for a Course during the period (set on the List) via the Learning Management System.

The benefits of the Request Import is that it can combine the Readings and Requests in one process to create Reading Lists and related records. The Requests Import may also be more suitable for initial data migration because it allows for sub-prime Readings; that is data that does not meet the validation requirements of eReserve Plus.

This import is suitable for creating new Reading List records (find_or_create) or supplementing existing Reading Lists with new records (find_only).

3.1 Pre-requisites

1. Courses - Ensure the courses are setup in eReserve with unique Course codes.
Ensure the Courses referenced in this Requests Import have the correct references to the Courses already created.
2. Teaching Sessions - The list of teaching periods called Teaching Sessions should have been pre-defined at Project setup. To check whether Teaching Sessions are implemented visit Configuration > Teaching Sessions.
3. Create a generic Academic account - all Requests imported in this way are identified as coming from this Academic account, typically a generic Library Staff email account. To create a new user visit Users > New and create a new user with the role of Academic. The email address for this user is used in the requester_email field.

4. Copyright email address for Requester email - The Copyright email address can be used in the requester email field for the Reading Requests to be automatically approved.

5. The Archive folder will need to be prepared as a .zip folder which should contain the following elements:

a. The Data File - This is a CSV file in UTF-8 file format - Filename = import_records.csv

b. The Mapping File - This is a YML file which references the data to map it to the correct fields - Filename = csv_to_document_mapping.yml

c. The Resource Folder - is a folder which should contain any physical files (e.g. PDFs, MPGs, JPGs etc) referenced in the Data File. All resources should be saved into the Resources folder with each file saved with its reference in the Data File. e.g. thedish.pdf

The templates and a sample dataset for each genre are available for use [here](#)

3.2 Data requirements

To ensure the import can process the data there are some mandatory fields required and an explanation of these follows depending on the duration of the Reading List. Before exploring duration it is important to consider the location – reading_list_locate_mode. If performing an import for the first time where the Reading List record does not yet exist the reading_list_locate_mode should be set to find_or_create.

If however, the import is being performed to add further requests and readings to an existing Reading List then the reading_list_locate_mode should be set to find_only. There are some matching rules to be aware of:

Custom Duration - attempts a match on the name of the reading list then if there is no match it will attempt to match on the duration (i.e. the start & end date)

Predefined Duration - attempts to match on the predefined duration (aka Teaching Session)

3.3 Mandatory Data - Duration

Requests apply a start and date to the use of a Reading and therefore additional metadata is required to create Requests, which in turn attach to a Reading List. There are two types of duration – Predefined (aka Teaching Sessions) or Custom dates. The mandatory data associated with the duration is explained below.

Reading Lists that are intended to have a Predefined duration utilise the associated Teaching Session and reference the correct code. Teaching Session codes are created by the system when they are entered. Examples include TS1, TS2 etc.

Column	Description	Type	Suggested Value
reading_list_locate_mode	The method used to find the associated reading list	Text	find_only or find_or_create
reading_list_duration	Duration of the reading list	Text	predefined
teaching_session_code	Represents the code for the associated Teaching Session that defines the duration.	Text	e.g. TS1, TS2, TS3

There are some specific validation rules to be aware of in relation to Reading lists with predefined durations:

- Only one Reading List can be created, per course, per duration
- A Reading List for predefined duration cannot be created if a custom duration Reading list exists with the same duration.

Reading Lists that are intended to be created with a Custom duration typically fall out of the predefined durations (i.e. short courses such as summer schools).

Column	Description	Type	Suggested Value
reading_list_locate_mode	The method used to find the associated reading list	Text	find_only or find_or_create
reading_list_duration	Duration of the reading list	Text	custom
reading_list_name	This is the name of the reading list	Text	e.g. 2019 Summer Intensive
reading_list_start_date	This is the date that the readings on the reading list become accessible to students.	Text	Your local date format e.g. DD/MM/YYYY or MM/DD/YYYY
reading_list_end_date	This is the date that the readings on the reading list are no longer accessible to students.	Text	Your local date format e.g. DD/MM/YYYY or MM/DD/YYYY

Reading Lists with Custom durations also have validation rules to observe:

- Reading list names must be unique
- Reading list durations must be unique (i.e. no two lists can have the same start & end date).

3.4 Mandatory Data - Requests

The mandatory data to import Requests is minimal as the intention is for Library Staff to collect or finalise any missing data once the Request is initiated in the system. The Request will be processed via a Workflow so there is opportunity to correct missing data. The minimum data requirements are outlined below:

Column	Description	Type	Suggested Value
source_document_title	The title of the document	Text	Data Dictionary
source_document_kind	The kind of source document associated with the reading (e.g. book, journal, etc.)	Text	Data Dictionary
source_document_licence	The licence for the source document	Text	Data Dictionary
reading_title	The title of the reading	Text	Data Dictionary
reading_genre	The genre of the reading itself (e.g. chapter, journal article, legal article, etc.)	Text	Data Dictionary
reading_kind	Denotes whether the reading is a FILE or a LINK or needs to be located	Text	Data Dictionary
reading_reference	The file or link associated with the Reading	Text	Data Dictionary
course	The code for the associated course of learning (e.g. Course, Subject, Paper, etc) that the reading is to be made	Text	e.g. CS101 (with course code filter) OR CS101_s2_2018 (without course code filter)
start_date	The date from which the reading is to be made available to students	Date	Your local date format e.g. DD/MM/YYYY or MM/DD/YYYY

Column	Description	Type	Suggested Value
end_date	The date when the reading is no longer available to students	Date	Your local date format e.g. DD/MM/YYYY or MM/DD/YYYY
reading_importance	Denotes if the reading is required to be read by Students	Text	Data Dictionary
requester_email	The email address for the academic account created as part of the prerequisites for import (see chapter 5.1)	Text	The email address for the academic account created as part of the prerequisites for import. See 3.1
supplied_total_pages	The total page count for the Source Document. This field is required for file-based book resources if the Mandatory Total Page count feature is enabled	Text	Data Dictionary

3.5 Additional data requirements

There are a number of secondary data requirements which are optional and are not required for the import of Requests to be successful. This optional metadata can be explored [required_fields_for_flat_file_import](#).

4. Common Data Definitions

There are some shared definitions across multiple import types. Each of these is explained in further detail below.

4.1 source_document_title

This is a unique title for the associated source document. Wherever possible this should not include aspects such as the year of publication, volume or issue. It should describe the common name for the source document. For example, if the reading is for an article in issue 1 of volume 2 of the Nature Journal then the source document title should be “Nature”.

4.2 source_document_kind

This column describes the kind of document for the reading being imported. Current supported kinds are as follows:

- book: A document falling under the following genres: Book, Conference, Proceeding, Report, etc.
- journal: A document falling under the following genres: Journal, Legislation, Legal Case, etc.
- sound: A recording of audio (e.g. song, interview, etc)
- visual: A recording of visual medium (e.g. movie, tv show, figure, map, etc)
- website: A reference to a website
- course_document: A document made by teaching staff for a specific course (e.g. lecture notes, slides form lectures, etc)

4.3 source_document_licence

This column describes the associated licence for the source document. It is specifically used in the creation of new source documents. If the associated source document has been created some time earlier the licence will not be changed and this column will be ignored. The current options for the column are as follows:

Australia

- printed_materials: Print Resource Statutory Licence
- audio_visual_materials: Audio/Visual Resource Statutory Licence
- external_link: External Link
- out_of_copyright: Out of copyright
- creative_commons_open_licensing: Creative Commons / Open Licensing
- eBook_licence: Permitted under eBook licence
- other_permission: Other permission
- library_database_licence: Permitted under Library Database licence

New Zealand

- institution_created: Own work
- permission_obtained: Permission obtained
- transactional_other: Transactional other
- no_known_copyright: No known copyright
- act_fair_dealing: Act (Fair Dealing)
- act_educational: Act (Educational)
- licence_open_access: Licence (Open Access)
- licence_subscription: Licence (Journal Subscription)
- licence_transactional: Licence (CLL Transactional)
- licence_cll: Licence (CLL)
- licence_out_of_print: Licence (CLL Out of Print)
- licence_apra: Licence (APRA)
- licence_screenrights: Licence (Screenrights)

- external_link: External Link

4.4 source_document_genre

This column describes the genre of the source document for the reading being imported. Current supported genres for each source document kind are as follows:

Genre for "book"

Following are the genres for the source document kind of "book". If this is not supplied then the default will be the genre of 'book'.

- book: a publication that is complete in one part or a designated finite number of parts, often identified with an ISBN
- conference: a publication bundling the proceedings of a conference
- proceeding: a conference paper or proceeding published in a conference publication
- report: report or technical report is a published document that is issued by an organisation, agency or government body
- document: general document type to be used when available data elements do not allow determination of a more specific document type, e.g. when one has only author and title but no publication information
- musical_score: Document containing a musical score

Genre for "journal"

Following are the genres for the source document kind of "journal". If this is not supplied then the default will be the genre of 'journal'.

- journal: a serial publication issued in successive parts
- legislation: Government legislation
- legal_case: a document containing articles for a legal case

- proceeding: a single conference presentation published in a journal or serial publication
- conference: a record of a conference that includes one or more conference papers and that is published as an issue of a journal or serial publication
- preprint: an individual paper or report published in paper or electronically prior to its publication in a journal or serial

Genre for "sound"

Following are the genres for the source document kind of "sound". If this is not supplied then the default will be the genre of 'broadcast'.

- broadcast: : a recording of a broadcast, ie. An radio show
- song: a collection of song recordings
- speech: a collection of sound recordings, ie. an audio book, pod casts, etc

Genre for "visual"

Following are the genres for the source document kind of "visual". If this is not supplied then the default will be the genre of 'broadcast'.

- broadcast: A broadcast television program
- motion_picture: A film or telemovie
- visual_document: A document containing images, figures or maps

Genre for "website" and "course_document"

Each of these source document kinds do not have any associated genres so this column can be left blank.

4.5 author

To ensure authors are displayed correctly in the citation, ensure each name is provided in the format of family name, given name. For example, John David Smith and Hillary Jackson would be formatted as Smith, John David, Jackson, Jane Hillary.

4.6 reading_title

The reading title should be a unique for the associated source document. For example, the reading can have the title of "Introduction" for the source document "Science in the real world". For that source document there can be no other reading title with the same name.

4.7 reading_genre

This describes the genre for the reading being imported. Current supported genres, grouped by source document kind, are as follows:

Readings genres for "book"

Following are the reading genres for the source document kind of "book". If this is not supplied then the default will be the genre of "bookitem".

- book: a whole book
- bookitem: a defined section of a book, usually with a separate title or number
- chapter: a full chapter of a book
- paper-conference: a paper from a publication bundling the proceedings of a conference
- proceeding: a conference paper or proceeding published in a conference publication
- report: report or technical report is a published document that is issued by an organization, agency or government body

- document: general document type to be used when available data elements do not allow determination of a more specific document type, e.g. when one has only author and title but no publication information
- musical_score: Part of a musical score

Reading genres for "journal"

Following are the reading genres for the source document kind of "journal". If this is not supplied then the default will be the genre of "article-journal".

- full_journal: a serial publication issued in successive parts
- article-journal: a document published in a journal
- article-newspaper: an article published in a newspaper
- article-magazine: an article published in a magazine
- legislation: Part of a government legislative document
- legal_case: an article for a legal case
- proceeding: a single conference presentation published in a journal or serial publication
- paper-conference: a paper from a conference
- preprint: an individual paper or report published in paper or electronically prior to its publication in a journal or serial

Reading genres for "sound"

Following are the reading genres for the source document kind of "sound". If this is not supplied then the default will be the genre of "broadcast".

- song: a recording of a song
- speech: an excerpt from a sound recording, ie. an audio book chapter, pod cast, etc
- broadcast: an excerpt from a broadcast recording, ie. a radio show's episode

Reading genres for "visual"

Following are the reading genres for the source document kind of "visual". If this is not supplied then the default will be the genre of "broadcast".

- broadcast: An excerpt from a broadcast television program
- motion_picture: An excerpt from a film or telemovie
- figure: A figure from a document
- graphic: A graphic image
- map: A map

Reading genres for "website" and "course_document"

For each of these source document kinds there are no associated reading genres so this column can be left blank.

4.8 reading_kind

This column tells eReserve Plus what kind of reading is described in the row. This can vary depending on the method of import your using. Following are the accepted values along with their use.

Value	Input Method(s)	Description
file	Import as reading or request	For readings that have a file associated with it
link	Import as reading or request	For readings that have a link associated with it
locate	Import as request only	For readings to be sourced by library staff

4.9 reading_importance

This is the most common way institutions allow their Academics to communicate if a reading is required or recommended. Following are the accepted values along with their use:

Value	Description
required	This identifies the resource as a 'required' reading for students
recommended	This identifies the resource as being a 'recommended' reading for students

4.10 reading_reference

This column contains the reference for the reading. If the reading_kind is FILE then eReserve Plus will use the content of this column to search for the associated file in the archive. If the reading_kind is LINK then eReserve Plus will expect a valid URL to the associated resource.

NB: It is expected that files contained within the archive will have a unique filename and be associated with only one record in the flat file.

4.11 count_kind & pages

For each reading that requires pagination there is expected to be a method of count recorded in the count_kind column. Currently eReserve Plus supports the following options for the count_kind column:

- P: The reading is paginated and the pages column is expected to contain a valid page range (e.g. i, ii-iv, 10-15, 20, 30-60, s10-s15, 254-8)
- W: The reading is not paginated and the pages column is expected to contain a count of the words in the document
- G: The reading is a graphic

The count_kind works hand in hand with the validation for the pages column. For example, if P is chosen for the count_kind then the validation will be expecting a valid pages or page range.

4.12 creation_method

For each file based reading eReserve Plus expects a creation method to be supplied in the creation_method columns. This relates to whether the reading has been scanned from a print document or it is born from an electronic document (e.g. eBook, PDF, etc). If the creation_method is left blank then eReserve Plus will use the default of scanned. Following are the options for this column:

- scanned: The reading is a scan of a printed document
- another: Born from an electronic document
- both: The electronic reading was at sometime printed then scanned

4.13 Anthologies

The Anthology field is optional for only the Book resource genre which will allow the upload and creation of books that are Anthologies. By default, the system will automatically assign "No".

If the book resource is an Anthology, "Yes" can be entered into the field, which will import the book resource as an Anthology. While "Yes" is entered, the "Source_document_author" field can be left blank, and the "Reading_authors" field can be used for the authors.

4.14 supplied_total_pages

The total page count field is available for the source document of file-based book and journal resources.

If the mandatory total page count feature is enabled for your institution, this field will be mandatory for ALL file-based book resources.

If the mandatory total page count feature setting is not enabled, then this field is optional and can be left blank.

5. Flat File Import for Legal Materials

These instructions provide specific advice on how to add legal materials such as cases and legislation as Readings into eReserve Plus.

Legal Materials are imported as **Readings** or **Reading Requests** and use the **Journal** genre within eReserve Plus.

Each Reading displayed by eReserve plus is a combination of a citation and bibliography. The citation is shown as the title of the reading and when clicked the bibliographic reference is displayed. This is an important distinction because citations and bibliographies contain very different information when using the Australian Guide to Legal Citation (AGLC) style. For example, pinpoint referencing (a reference to a specific place in the cited text) is only provided in the citation and not the bibliography.

Please note, 'Unreported Decisions' (s2.8) from AGLC Third Edition are not supported by eReserve Plus.

There are a number of additional fields to be populated for Legal Materials:

Jurisdiction

Jurisdiction typically used for Bills and Legislative readings can be provided by simply populating the jurisdiction field. Once in that field it will be used in the Citations, where applicable.

Number

This field is populated when a serial publication is published by year. In some cases there can be multiple releases during one year and if this is the case, the number of the release needs to be placed in the number field. Specifically this is outlined in AGLC Third Edition 2.2 '...If more than one volume is produced in a single year, the volume number should be

included between the year and the report series abbreviation...' So, for the 2nd volume of "Rowe v McCartney" the resulting citation would be created Rowe v McCartney [1976] 2 NSWLR 72.

Section

The section field is used to record the pinpoint reference.

To provide pinpoint references in the section field you must prefix the reference with appropriate abbreviation. For example,

Cases - Where there needs to be a reference to Section 7, enter s 7 in the section field.

Legislative Materials - Where there needs to be a pinpoint reference to a section of the document, prefix the section detail with s then the section as per the AGLC rules, s 3 (as per 3.1) and reg 3 (as per 3.3). Combinations can be provided e.g. s 7 para 4 for section 7 paragraph 4.

For more specific details on the appropriate abbreviations, please see the following sections of the AGLC Third Edition:



General: 1.15 & 1.16

Legislate: 3.1.4, 3.1.5 & 3.3.2

Cases: 2.5

Journals: 4.7

Books: 5.4

5.1 Mandatory Data - Cases

The translation of AGLC terms into the appropriate field in eReserve Plus is provided below:

eReserve Column	AGLC Term
reading_title	Case Name
year	Year
volume	Volume
short_title	Law Report Series
pages*	Starting Page
section	Pinpoint

The is used in conjunction with [count_kind: P*](flatfile-import-ch5.html#511-count_kind--pages).

5.2 Mandatory Data - Legislative Materials

The translation of AGLC terms for Statutes, Legislation and Bills into the appropriate field in eReserve Plus is provided below:

eReserve Column	AGLC Term
reading_title	Title
year	Year
jurisdiction	Jurisdiction
section	Pinpoint

6. Teaching Session Import

eReserve Reading Lists are assigned to Teaching Sessions, which determine the availability of the list based on the supplied start and end dates. Each Teaching Session includes an optional Matching Key, that allows offerings from the LMS that match the key to be automatically published to the Teaching Session. If you would like to know more about the Matching Key, [contact the eReserve Support team](#).

Teaching sessions can be manually added or edited, [see here for more details](#), however the Teaching Session import process allows for a large number of Teaching Sessions to be created or updated.

The import process matches data from the name column to update existing Teaching Session records.

6.1 Pre-requisites

The Archive folder will need to be prepared as a .zip folder which should contain the following elements:

- a. The Data File: This is a CSV file in a UTF8 file format - Filename = import_records.csv
- b. The Mapping File: This is a YAML file which references the data to map it to the correct fields in eReserve Plus - Filename = csv_to_document_mapping.yml

The templates and a sample dataset are available for use [here](#).

6.2 Mandatory Data

The import_records.csv file will populate eReserve Plus with Course Codes, Descriptions and School Associations.

Column Name	Description	Type	Format Values
source_document_kind	This column describes the kind of document being imported. When importing courses this should be set to session.	text	session
name	This column is a unique value used to identify the teaching session. Existing records with the same name will be updated.	text	e.g. Semester 1 2023
start_date	This column specifies the starting date of the Teaching Session.	text	e.g. Your local date format e.g. DD/MM/YYYY or MM/DD/YYYY
end_date	This column specifies the end date of the Teaching Session.	text	e.g. Your local date format e.g. DD/MM/YYYY or MM/DD/YYYY
matching_key	This column is used to automatically match offerings to a Teaching Session. For example, the key S1_2023 matches the following offerings: CS101_S1_2023, HSP01_S1_2023.	text	e.g. S1_2023

7. Schools Import

eReserve groups Courses into Schools/Departments, which allow faculty and library staff to select the appropriate school membership for their Course, and enables eReserve Plus to generate meaningful audit and utilisation reports.

Schools can be manually added or edited, [see here for more details](#), however the Schools import process allows for a large number of Schools to be created or updated.

The import process matches data from the name column to update existing School records.

7.1 Pre-requisites

The Archive folder will need to be prepared as a .zip folder which should contain the following elements:

- a. The Data File: This is a CSV file in a UTF8 file format - Filename = import_records.csv
- b. The Mapping File: This is a YAML file which references the data to map it to the correct fields in eReserve Plus - Filename = csv_to_document_mapping.yml

The templates and a sample dataset are available for use [here](#).

7.2 Mandatory Data

The import_records.csv file will populate eReserve Plus with Centre Codes and Citation Style Codes.

Column Name	Description	Type	Format Values
source_document_kind	This column describes the kind of document being imported. When importing courses this should be set to school.	text	school
name	This column is a unique value used to identify the school. Existing records with the same name will be updated.	text	e.g. Science
centre_code	This is a short abbreviation for each school if available (optional).	text	e.g. SC
citation_style_code	This is a short abbreviation for the default citation style of the school (optional).	text	e.g. APA7