How to use Excel to create local thresholds

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You can use formulas in Excel to help creating local thresholds to use in DataLoader.

Creating input file

You will need to create an Excel spreadsheet with the ISSNs in the first column (column A). You can use the journal names in column B to aid in identification (optional). The third column should contain the value 'ACTIVE' (case sensitive) in case you also want to activate the portfolios for these journals during the same 'DataLoad' (optional).

Use three columns to input the years, volumes and issues for your journals.

Method 1

Insert blank columns to the left of each of these numerical values.

Enter the following value into the cell D1 (i.e. the first part of the local threshold):

$obj->parsedDate(">=",

Afterwards, use the 'fill' feature in Excel to populate the column (use the 'Fill handle' at the right bottom side of each selected cell or use 'Edit' - 'Fill Down').

Do the same for cell F1, H1 and J1 inserting the values: (comma), (comma) and (end parenthesis)

In the column to the right of the last one, insert the formula:

=D1&E1&F1&G1&H1&I1&J1

Use the 'fill' feature in Excel to populate the column (use the 'Fill handle' at the right bottom side of each selected cell or use 'Edit' - 'Fill Down').

You now have a syntactically correct date threshold. To complete the process, you will need to make sure the cells in this column become 'text values', instead of formulas.

Select the column with the threshold values (click on the letter at the top). CTRL-C will paste the material into your buffer.

Now select the next column over (click on the letter at the top; in our example it is column L)

Go to the "edit" menu and select "paste special" – then select "value"

Now you can delete all the "workspace" columns containing information you no longer need.

Some moving of extra data could yield the following: columns A (ISSN), B (ACTIVE) & C (LOCAL THRESHOLD) would be used in DataLoader.

Method 2

Insert a blank row at the top of your excel file.

Insert the following value into the cell A1:

$obj->parsedDate(">=",

Insert the following formula in cell G2:

=A1&D2&","&E2&","&F2&")"

Use the 'fill' feature in Excel to populate the column (use the 'Fill handle' at the right bottom side of each selected cell or use 'Edit' - 'Fill Down').

You now have a syntactically correct threshold. However, the cells in this column still consist of only a formula, not a text value.

Select the column with the threshold values (click on the letter at the top). Press CTRL-C will paste the material into your buffer.

Now select the next column over (click on the letter at the top; in our example it is column H)

Go to the "edit" menu and select "paste special" – then select "values"

Now you can delete all the "workspace" columns containing information you no longer need.

Some moving of extra data could yield the following: columns A (ISSN), B (ACTIVE) & C (LOCAL THRESHOLD) would be used in DataLoader.