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## Using the Taylor & Francis AutoLoader for SFX

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### Note

For Taylor & Francis Books, this feature is available for the SFX September 2023 release.

For Taylor & Francis Journals, this feature is available for the SFX December 2024 release.

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The Taylor & Francis AutoLoader in SFX allows institutions to automatically update their holdings within the Taylor & Francis journals and books offerings. Separate automated processes (and separate holdings files) exist for books and journals. Once enabled, the processes automatically download a KBART formatted holdings file from the Taylor & Francis platform to your SFX environment, upload the file, and update your holdings in the Taylor & Francis Journal and book collections. For this purpose, we added the following dedicated targets to the SFX KnowledgeBase:

- TAYLOR\_AND\_FRANCIS\_EBOOKS\_COMPLETE-getFulltxt
- TAYLOR\_FRANCIS\_JOURNALS\_AUTOHOLDINGS\_COLLECTION-getFullTxt

The processes use separate institutional tokens for the T&F Journals and Books to identify which holdings file belongs to your institution.

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## Obtaining the Institutional Token for the Taylor & Francis Books AutoLoader

The Taylor & Francis Librarian dashboard allows you to generate an institutional token that SFX can use to retrieve the institutional KBART holdings report through the KBART automation API.

For more information on creating the institutional token, see [Obtaining Taylor & Francis Institutional Token](#).

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## Obtaining the Institutional Token for the Taylor & Francis Journals AutoLoader

As a Library Administrator, you can generate an API token that SFX can use to retrieve the institutional KBART holdings report through the KBART automation API.

For more information on creating the API token, see [How Do I Generate an API Token?](#)

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## Enabling the AutoLoader Process on SFX

After you obtain the institutional token (also called the CRN number) for the Books autoloader or the API token for the Journals autoloader, you can enable the AutoLoader process on SFX.

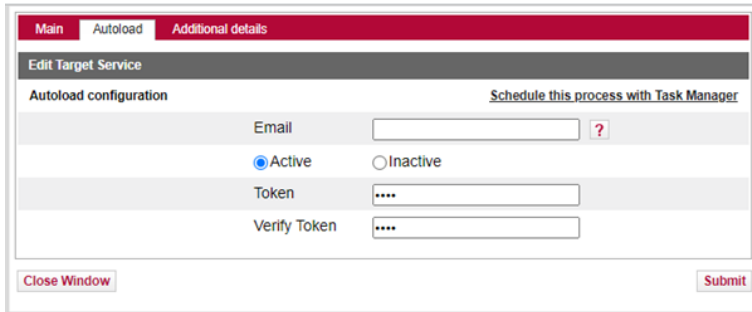
To enable the AutoLoader process on SFX:

- For books: Activate the following collection including their full text services (getFulltxt) in the SFX KBManager:

## TAYLOR\_AND\_FRANCIS\_EBOOKS\_COMPLETE-getFulltxt

- For journals: Activate the following collection including their full text services (getFulltxt) in the SFX KBManager: TAYLOR\_FRANCIS\_JOURNALS\_AUTOHOLDINGS\_COLLECTION-getFullTxt

In the Edit Target Service window of the collection, select the **Autoload** tab. Select the **Active** option and add your token, as well as your email address to receive notifications. You can use the top right link to schedule the process with the task manager. The recommended schedule is weekly, on Saturday, as this aligns with Taylor & Francis processes to retrieve your holdings file the next day (Sunday).



Autoload configuration		<a href="#">Schedule this process with Task Manager</a>
Email	<input type="text"/>	?
<input checked="" type="radio"/> Active	<input type="radio"/> Inactive	
Token	<input type="password"/>	
Verify Token	<input type="password"/>	

[Close Window](#) [Submit](#)

The holdings files always contain all your holdings. The process activates and localizes newly added items and deactivates items that no longer appear on the holdings list. The same process is also available for Elsevier, Springer, Wiley and Ovid.

For more information, refer to the **Target Services** section in the *SFX General User's Guide*.