
Create SFX Institutional Holdings for Primo Central

- **Article Type:** General
 - **Product:** Primo
 - **Product Version:** 4
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Desired Outcome Goal:

Generate the SFX institutional holdings XML file and URL for the Primo Central form (also known as SFX Full Text Availability Data for Primo Central).

Procedure:

This process can be run in the SFX Admin Center (Procedure 1) or the server (Procedure 2).

Procedure 1

In the SFX local Admin Center web interface > KBTools > Export Tool

Step 1. select Advanced Export Queries tab

Step 2. Select Output format = Google Scholar

Step 3. select Serials and Monographs checkbox, if you have both types of targets activated

Step 4. leave additional export file text box empty

Step 5. select all services

(from Primo Central Team: "It is best to include all services in the file. Primo Central knows to ignore services that are not full-text, so it doesn't disrupt our process.")

Step 6. Export from ALL targets

Step 7. check Compress output files

Step 8. check Include author information if you are including ebook monograph information

Step 9. Select Chinese Titles option, as appropriate, e.g., Both

Step 10. Click Submit

Procedure 2

* In the SFX server, sfxlcl41 instance:

Step 1. >> da

Step 2. >> ./server_admin_util

takes you to the Main Menu

Step 3. 8 Export GOOGLE institutional holdings file

Please select [1-12,q,m]: 8

Step 4. Export GOOGLE institutional holdings Tools

Step 5. 1 (Re)Export GOOGLE institutional holdings file

Step 6. Chinese Titles Export include the following (if exists): Simplified, Traditional or Both [S,T,B]:b

Step 7. Please enter the institute's name (Leave empty for Default): [default leaves empty]

Step 8. Please select object types: Serials, Monographs or Both [S,M,B]:b

Step 9. Use the following additional export file from scratch directory (optional, leave empty for None):

Step 10. Export active portfolios with the following services: > 7 All

Please select [1-7]: 7

Step 11. Use zip compression? [Y/n] Y

Step 12. Would you like to add author information? [Y/n] Y (if you are including ebook monograph information)

Step 13. The system responds:

Running the index builder. This may take a long time, depending on the amount of active portfolios.
Export Successful.

Additional Information

* Output file location in SFX4: /exlibris/sfx_ver/sfx4_1/sfxlcl41/export/institutional_holding.xml

For a library using this base URL for SFX: <http://my.library.com/sfxadmin/sfxlcl3>

The URL would be: http://my.library.com/sfxlcl4/cgi/public/get_file.cgi?file=institutional_holding.xml

If this URL does not work, see KCS Article "The SFX Institutional Holdings File Does Not Open in My Browser"

* A schedule should be created via the server_admin_util, so the file will be updated regularly.

The Primo Central system harvests these files weekly.

The process is lengthy and the harvest may run anytime between Thursday evening (Israel time!) and Sunday.

Best Practice: Schedule this export to run before 10am ET (USA) Thursday

Category: Interoperability (SFX)

Subject: Primo

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