
Elsevier ScienceDirect Autoloader automated download and KB loader

Description of the Elsevier SD ScienceDirect Autoloader feature for SFX and implementation instructions for the Autoloader in the SFX KBManager and unix environment. The feature will allow for automatic updates of customer Elsevier holdings in the SFX KnowledgeBase, using a data file downloaded directly from the vendor, including local coverage date thresholds. Two new targets, ELSEVIER_SCIENCE_DIRECT_AUTOLOAD_JOURNALS and ELSEVIER_SCIENCE_DIRECT_AUTOLOAD_BOOKS have been added to the KB.

Elsevier ScienceDirect Autoloader

Elsevier now provides a new mechanism to allow institutions to update automatically their entitlements within the ScienceDirect, ebooks, and ejournals offerings. In SFX version 4.7.2, a new option has been added to the SFX ServerAdmin Utility to automatically download the Elsevier ScienceDirect holdings file (in KBART format) and to update the Science Direct title lists in the SFX KnowledgeBase (activate and load local coverage). Two new dedicated targets have been added to the SFX KB to work with the automated load option.

Workflow of the Automated process

1. The Elsevier ScienceDirect customer holdings file is downloaded in KBART format, using the customer specific credentials stored in the Elsevier configuration file. 2. The file is split into a monograph and serial file based on the publication_type (serial or monograph) and stored locally as two separate files in the SFX scratch directory. Note: If the publication_type column contains no value, the record is skipped. 3. If either the default or if only one institute or group is specified in the program: a) Dataloader runs for the downloaded and split files to activate and add local thresholds to the following dedicated Elsevier ScienceDirect targets: • ELSEVIER_SCIENCE_DIRECT_AUTOLOAD_JOURNALS • ELSEVIER_SCIENCE_DIRECT_AUTOLOAD_BOOKS b) Portfolios not included in the load file are deactivated. 4. A report is produced with the following information: • information concerning any problems that may have occurred during the download or deactivation step • the location of the dataloader report files

Configuring the Automated Localization of the Elsevier Science Direct Targets

IMPORTANT NOTE: SFX Total Care customers need only to obtain an institutional token from Elsevier and provide the token to the SFX Support Team. All configuration steps below will be performed by the Support Team.

1. Request an institutional token from Elsevier and place it in the following configuration file together with the email address of the SFX administrator: /exlibris/sfx_ver/sfx4_1/<instance>/config/elsevier_sd_autoloader.config_ • For the "active" parameter, change the value from 0 to 1, if you intend to schedule the autoloader process from the SFX instance. 2. In KBManager, activate the following two dedicated targets and their getFullTxt target services: • In KBManager, activate the following two dedicated targets and their getFullTxt target services:

ELSEVIER_SCIENCE_DIRECT_AUTOLOAD_JOURNALS ELSEVIER_SCIENCE_DIRECT_AUTOLOAD_BOOKS 3. If manually activated Elsevier targets are currently in use in the SFX KB, activate the following display logic rule: If available: ELSEVIER_SCIENCE_DIRECT_AUTOLOAD getFullTxt Do not show: ELSEVIER_SD getFullTxt This rule prevents duplicate Elsevier ScienceDirect targets from being displayed in the SFX menu during the transition period. 4. Run the Elsevier autoloader option from ServerAdmin Utility (from the Main menu select **8 -> Import/Exports** and then **4 -> Elsevier ScienceDirect Autoloader**) 5. Set up a scheduled task to run the autoloader option once a month, either per local instance ServerAdmin Utility options **8->4->3**, or via the

Centralized Management of Maintenance Tasks option. 6. If manually activated Elsevier targets are currently in use in the SFX KB: a Use the Collection tool (SFXAdmin > KBTools > Collection tool) to compare the activation and thresholds between the new autoloader targets and previously manually activated targets. This allows you to check that all activations are now in place in the new dedicated Elsevier ScienceDirect targets. b Deactivate the old, manually activated targets and portfolios

Configuration for Consortia

The program can be configured to work with multiple holdings files per instance (one per institute), each with separate credentials. Run the program separately for each institute.

For consortia API customers, perform all Elsevier ScienceDirect target activations in the local instance, to allow you to use the autoloader. The Elsevier file contains all holdings per institution, regardless of whether the books or journals are purchased by the consortium or locally