

## Loading Print Serial Information into SFX

These instructions are divided into two parts. Part I is designed to help libraries decide **whether** to upload information about print (or microform) journal titles into their local SFX Knowledge Base. CARLI libraries are not required to upload print title information into SFX; this is entirely optional. Most scenarios in this document are modeled on CARLI I-Share libraries and refer to the LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target. General principles discussed would apply to any OPAC target.

Part II is specifically for CARLI I-Share libraries and details **how** to upload print serial title data into SFX. This process requires basic knowledge of Microsoft Access in the CARLI reporting environment (to retrieve print title data from the Voyager database) and of Microsoft Excel (to edit data files).

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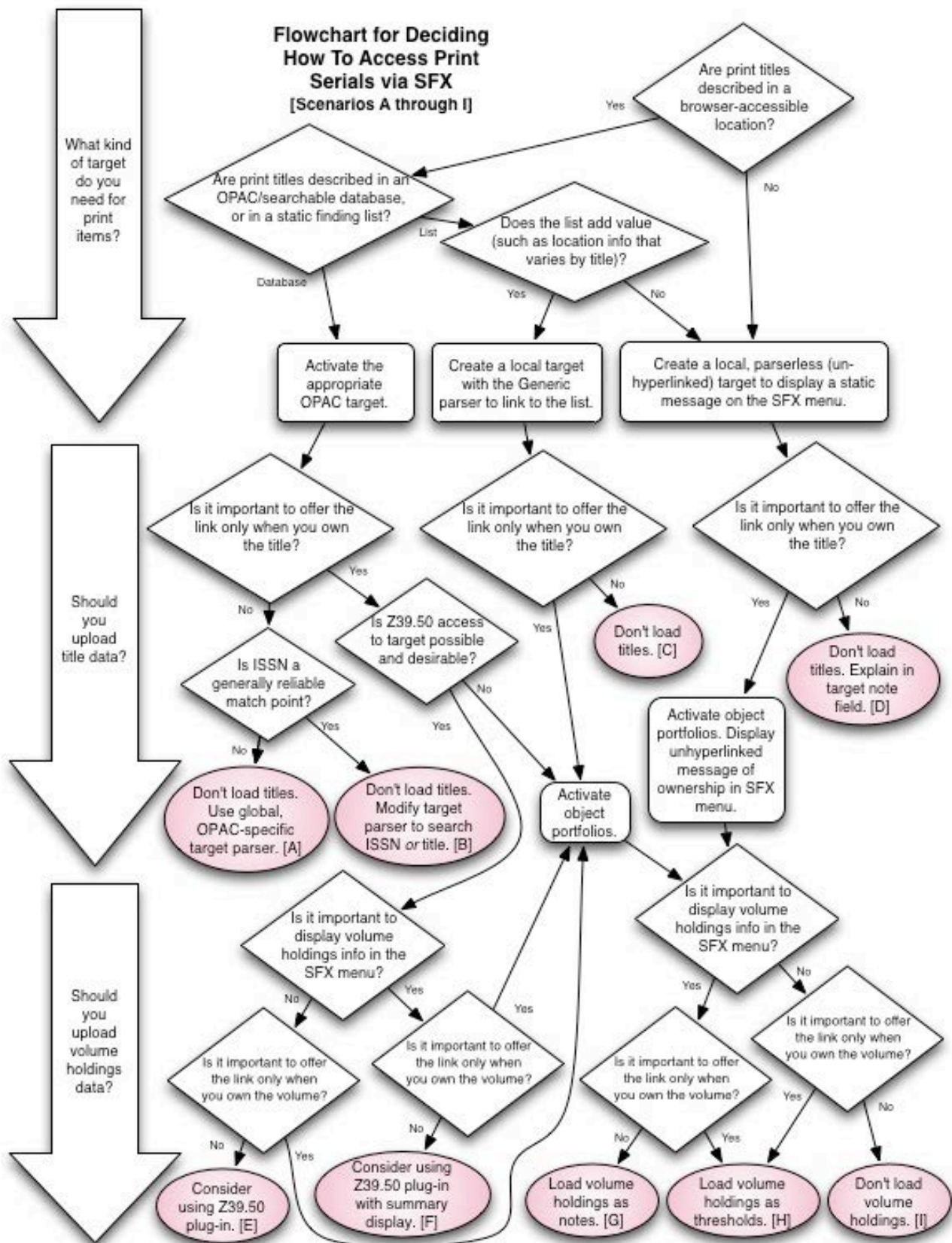
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## Part I

When a library first activates a LOCAL\_CATALOG... target, the target will display in the SFX menu whenever the data in an OpenURL meet the general threshold requirements (for instance, when they include an ISSN, ISBN, or title), as long as no display logic rules cause the target to remain hidden. By default, OPAC targets do not have object portfolios, and Object Look-up is set to No at the target-service level. This means SFX does not match the specific metadata values in the OpenURL against localized Knowledge Base (KB) information the way it does when a target has active object portfolios. Because the thresholds are so easy to pass and because by default SFX does no look-up in the KB, active LOCAL\_CATALOG... targets will almost always display on the SFX menu.

### Flowchart

The flowchart below is designed to help libraries decide whether it is appropriate to upload print journal title information into their SFX instances. Scenario designations appear in the shaded ovals on the flowchart. Scenario descriptions follow.



## Scenario Configuration Summaries

### Scenario A

Target	Appropriate LOCAL_CATALOG... target as delivered in global KB; for instance, LOCAL_CATALOG_EXLIBRIS_VOYAGER
Target Parser	As delivered in global KB
Target Service (TS)	getHolding
TS' Threshold	(\$obj->need('ISBN')    \$obj->need('ISSN')    \$obj->need('bookTitle')    \$obj->need('journalTitle')    \$obj->need('@abbrevTitle'))
TS' Object look-up setting	Unchecked
TS' Object Portfolios (OPs)	None
OPs' attributes	N/A

### Scenario B

Target	Appropriate LOCAL_CATALOG... target as delivered in global KB; for instance, LOCAL_CATALOG_EXLIBRIS_VOYAGER
Target Parser	Locally modified to search ISSN or alternative match point, such as \$jtitle or \$oclnum
Target Service (TS)	getHolding
TS' Threshold	(\$obj->need('ISBN')    \$obj->need('ISSN')    \$obj->need('bookTitle')    \$obj->need('journalTitle')    \$obj->need('@abbrevTitle'))
TS' Object look-up setting	Unchecked
TS' Object Portfolios (OPs)	None
OPs' attributes	N/A

### Scenario C

Target	Local target such as OUR_SERIALS_HOLDINGS_LIST_LCL
Target Parser	Generic
Target Service (TS)	getHolding
TS' Threshold	\$obj->need('journalTitle')    \$obj->need('@abbrevTitle')
TS' Object look-up setting	Unchecked
TS' Object Portfolios (OPs)	None
OPs' attributes	N/A

### Scenario D

Target	Local target such as OUR_SERIALS_HOLDINGS_LIST_LCL
Target Parser	None; instead populate Target or Target Service note field with explanation to users about where/how to access print serials
Target Service (TS)	getHolding
TS' Threshold	\$obj->need('journalTitle')    \$obj->need('@abbrevTitle')
TS' Object look-up setting	Unchecked
TS' Object Portfolios (OPs)	None

OPs' attributes	N/A
-----------------	-----

### Scenarios E & F

Target	Appropriate LOCAL_CATALOG... target as delivered in global KB; for instance, LOCAL_CATALOG_EXLIBRIS_VOYAGER
Target Parser	As delivered in global KB
Target Service (TS)	getHolding
TS' Threshold	GLOBAL && \$obj->plugIn('Z3950Lookup')
TS' Object look-up setting	Unchecked
TS' Object Portfolios (OPs)	None
OPs' attributes	N/A

### Scenario G

Target	Locally created or globally provided target, as appropriate
Target Parser	OPAC-specific, Generic, or none, as appropriate
Target Service 1 (TS1)	getHolding
TS1's Threshold	(\$obj->need('ISBN')    \$obj->need('bookTitle'))
TS1's Object look-up setting	Unchecked
TS1's Object Portfolios (OP)	None
Target Service 2 (TS2)	getHolding
TS2's Threshold	(\$obj->need('ISSN')    \$obj->need('journalTitle')    \$obj->need('@abbrevTitle'))
TS2's Object look-up setting	Checked
TS2's Object Portfolios (OP)	Loaded and activated to represent library's serial titles
OP's attributes	Volume holdings data loaded as notes

### Scenario H

Target	Locally created or globally provided target, as appropriate
Target Parser	OPAC-specific, Generic, or none, as appropriate
Target Service 1 (TS1)	getHolding
TS1's Threshold	(\$obj->need('ISBN')    \$obj->need('bookTitle'))
TS1's Object look-up setting	Unchecked
TS1's Object Portfolios (OP)	None
Target Service 2 (TS2)	getHolding
TS2's Threshold	(\$obj->need('ISSN')    \$obj->need('journalTitle')    \$obj->need('@abbrevTitle'))
TS2's Object look-up setting	Checked
TS2's Object Portfolios (OPs)	Loaded and activated to represent library's serial titles
TS2's OPs' attributes	Volume holdings data loaded as thresholds

### Scenario I

Target	Locally created or globally provided target, as appropriate
Target Parser	OPAC-specific, Generic, or none, as appropriate
Target Service 1 (TS1)	getHolding
TS1's Threshold	(\$obj->need('ISBN')    \$obj->need('bookTitle'))
TS1's Object look-up setting	Unchecked
TS1's Object Portfolios (OP)	None
Target Service 2 (TS2)	getHolding
TS2's Threshold	(\$obj->need('ISSN')    \$obj->need('journalTitle')    \$obj->need('@abbrevTitle'))
TS2's Object look-up setting	Checked
TS2's Object Portfolios (OPs)	Loaded and activated to represent library's serial titles
TS2's OPs' attributes	No volume holdings data loaded

### Scenario Details and Illustrations

#### **[A] Activate OPAC target. Do not load titles. Use global, OPAC-specific target parser.**

The LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target appears on the SFX menu unconditionally at Library A: it appears whether the library owns an object in print or not. The librarians at Library A maintain records for their print serials in their Voyager catalog. To access these items via the SFX menu they decided that a link to the OPAC, where the user may or may not find a record for the particular title desired, was sufficient.

To replicate this scenario:

1. Activate the LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target.
2. Activate the target's getHolding service.
3. Review and fill in the flag values in the list of Linking Parameters (L/P). Click "E" for edit. (Figure 60, Appendix A)
4. Note that Object Look-up is set to "No". (Figure 61, Appendix A)
5. To edit the text that appears in the SFX menu for this service type, go to Configuration > Translations & Display > Service Public Names. For example, replace the default text of "Holdings in" with "We may have this in print. Please check. " (Figure 62, Appendix A)



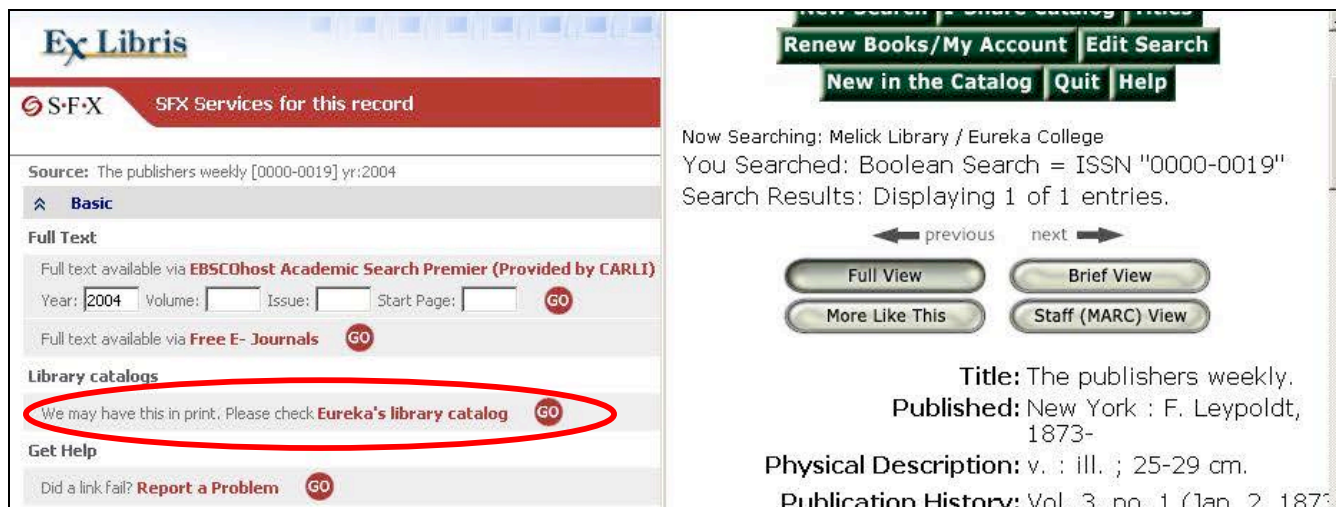


Figure 1: Library A when print holdings available

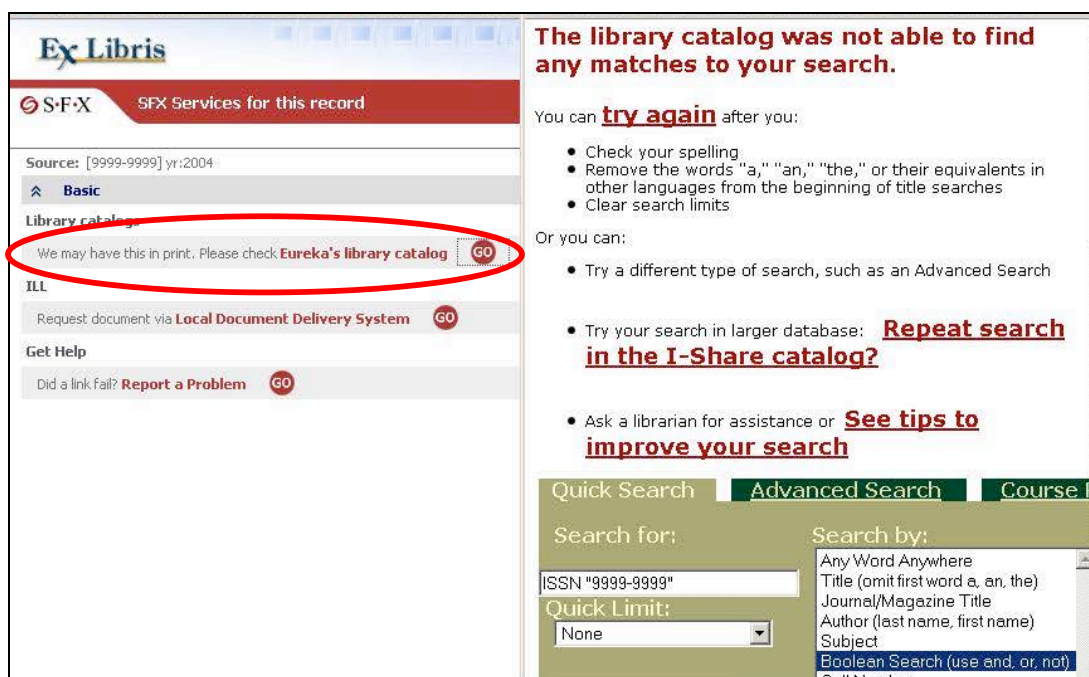


Figure 2: Library A when no print holdings available (target displays on SFX menu regardless)

## [B] Activate OPAC target. Don't load titles. Modify parser to search ISSN or title.

The LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target appears on the SFX menu unconditionally at Library B: it appears whether the library owns an object in print or not. The librarians at Library B maintain records for their print serials in their Voyager catalog. To access these items via the SFX menu they decided that a link to the OPAC, where the user may or may not find a record for a print item, was sufficient. Because many serial titles in the Library B catalog do not yet contain an ISSN, the target parser was modified to search the OPAC by ISSN or title keyword, using information from the OpenURL, as enhanced by matches in the SFX KB. The parser was also modified so that the linking URL it builds will execute an OPAC search that is limited to serials.



Code from original VOYAGER.pm parser:

```
$url="$base_url/Pwebrecon.cgi?DB=local&Search_Arg=ISSN+%22$issn%22&Search_Code=CMD&CNT=10";
```

Code from Library B's modified VOYAGER.pm parser:

```
$url="$base_url/Pwebrecon.cgi?DB=local&Search_Arg=ISSN+%22$issn%22+or+  
tkey+%22$jtitle%22&SL=Submit%26TYPE%3Das%7C2&Search_Code=CMD&CNT=10";
```

To replicate this scenario:

1. Activate the LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target.
2. Activate the target's getHolding service.
3. Review and fill in the flag values in the list of Linking Parameters (L/P). Click "E" for edit. (Figure 60, Appendix A)
4. Note that Object Look-up is set to "No". (Figure 61, Appendix A)
5. To edit the text that appears in the SFX menu for this service type, go to Configuration > Translations & Display > Service Public Names. For example, this tool can be used to replace the default text of "Holdings in" with "We may have this in print. Please check." (Figure 62, Appendix A)
6. In the UNIX File Manager, go to lib/Parsers/TargetParser/ENDEAVOR to edit the VOYAGER.pm target parser as described above. Additional instructions are available in Chapter 5 of the *SFX Advanced User's Guide*.
7. Contact the CARLI Office at [support@carli.illinois.edu](mailto:support@carli.illinois.edu) to have Apache restarted.

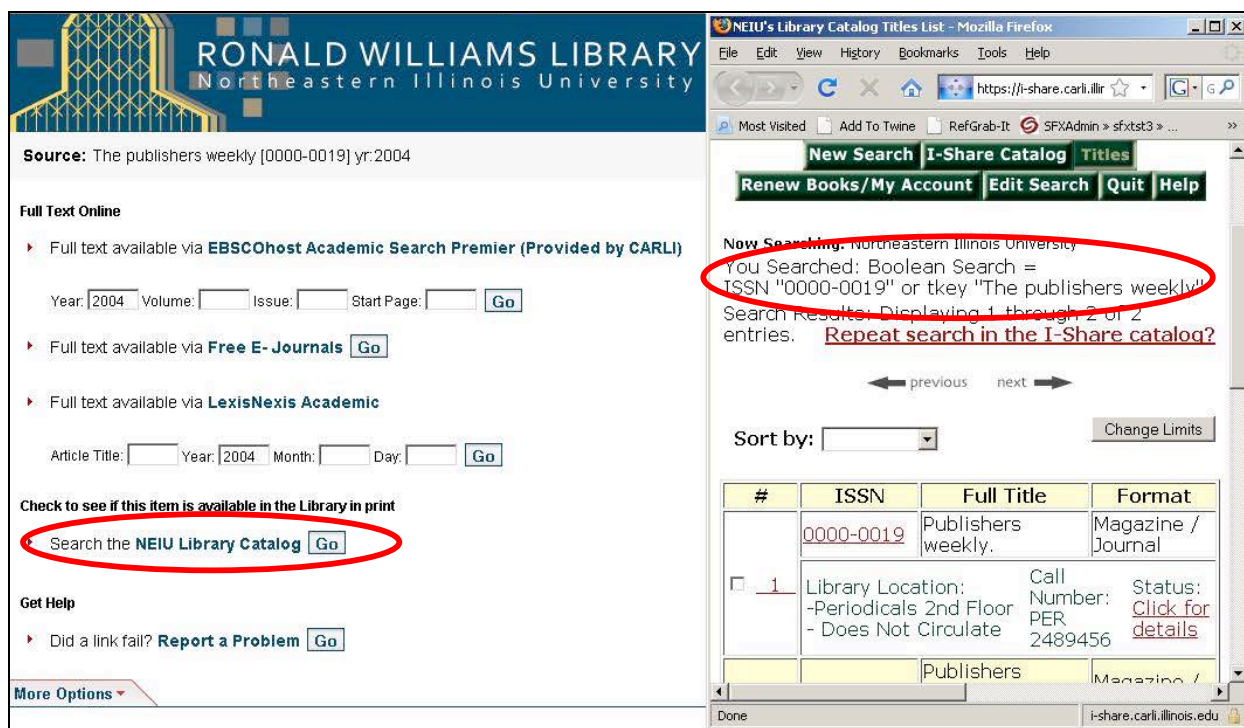


Figure 3: Library B's OPAC target parser executes search by ISSN or title.

### [C] Create a local target with the Generic parser linking to the serial holdings list. Don't load titles.

The OPAC target appears on the SFX menu unconditionally at Library C: it appears whether the library owns an object in print or not. The librarians at this institution do not maintain records for their print serials in their catalog. Instead they maintain a web-accessible list that provides title, volume, and location information. To access these items via the SFX menu they decided that a link to the list, which may or may not contain the desired title, was sufficient.

To replicate this scenario:

1. Create a new target. Enter a name for the target in capital letters and select the getHolding service. (Figure 63, Appendix A)
2. Edit the getHolding service for the target. Determine a public name, enter the parser as "Generic," and insert a URL into the parse param field as instructed in Chapter 5 of the *SFX Advanced User's Guide*.

**Main** **Additional details**

**Edit Target Service - OUR\_SERIALS\_HOLDINGS\_LIST\_LCL - getHolding**

Service:

Public Name (global):  [+ Add local](#)

Description:

Activation status: ☒ Active ☐ Inactive

Site down: ☐ Site down date:  ☐ Site down reason:

Object Lookup (global): ☐ [+ Add local](#)

Is free?: ☐

Parser (global):  [+ Add local](#)

Parse Param (global):  [+ Add local](#)

AutoActive: This target is not an aggregator package and the default AutoActive setting is 'No'. You can overwrite this setting by using the dropdown below.

AutoUpdate: ☐

Displayer (global):  [+ Add local](#)

Use proxy: ☐

Crossref Supported: ☐ [?](#)

Threshold (global):  [+ Add local](#)

**Figure 4: Library C getHolding target service settings**

3. Note that the Object Lookup box is unchecked.
4. Add additional information in the notes field if necessary.
5. To edit the text that appears in the SFX menu for this service type, go to Configuration > Translations & Display > Service Public Names. For example, this tool can be used to replace the default text "Holdings in" with "We may have this in print. Please check." (Figure 62, Appendix A)

**[D] Create a local, parserless (un-hyperlinked) target. Don't load titles. Explain in target note field.**

The local serial holdings target appears on the SFX menu unconditionally at Library D: it appears whether the library owns an object in print or not. The librarians maintain a small collection of uncataloged periodicals that are recycled after 6 months on the shelf. To access these items via the SFX menu, they decided that a static message about the existence of the collection would be sufficient.

To replicate this scenario:

1. Create a new target. Enter a name for the target in capital letters and select the getHolding service. (Figure 63, Appendix A)

2. Check to ensure Object Lookup box is unchecked.
3. Type an explanatory message in the note field.
4. To edit the text that appears in the SFX menu for this service type, go to Configuration > Translations & Display > Service Public Names. For example, this tool can be used to replace the default text of “Holdings in” with “We may have this in print. Please check.” (Figure 62, Appendix A)

The screenshot shows the 'Edit Target Service' configuration page for 'OUR\_SERIALS\_HOLDINGS\_LIST\_LCL - getHolding'. The 'Main' tab is selected. The form includes the following fields and controls:

- Service:** A dropdown menu set to 'getHolding'.
- Public Name (global):** An empty text field with a '+ Add local' button.
- Description:** A large text area.
- Activation status:** Radio buttons for 'Active' (selected) and 'Inactive'.
- Site down:** A checkbox for 'Site down date' (set to '0000-00-00 00:00:00') and a text field for 'Site down reason'.
- Object Lookup (global):** A checkbox that is unchecked, with a '+ Add local' button.
- Is free ?** A checkbox that is unchecked.
- Parser (global):** A text field circled in red, with a '+ Add local' button.
- Parse Param (global):** A text field with a '+ Add local' button.
- AutoActive:** A section with a message: 'This target is not an aggregator package and the default AutoActive setting is "No". You can overwrite this setting by using the dropdown below.' and a dropdown menu set to 'Aggregator Settings'.
- AutoUpdate:** A checkbox that is unchecked.
- Displayer (global):** A text field with a '+ Add local' button.
- Use proxy:** A checkbox that is unchecked.
- Crossref Supported ?** A checkbox that is unchecked, with a red question mark icon.
- Threshold (global):** A text field containing the expression '\$obj->need("journalTitle") || \$obj->need("@abbrevTitle")' with a '+ Add local' button.
- Buttons:** 'Compose' and 'Clear' buttons.
- Authentication note:** A text area.
- General note:** A text area circled in red, containing the text 'All periodicals shelved in the West Reading Room.'

Figure 5: Library D getHolding service settings

**[E & F] Activate OPAC target. Consider using Z39.50 plug-in OR Z39.50 plug-in with summary display.**

The CARLI Office has experimented with the Z39.50 plug-in in the Voyager environment. The look-up itself works quite well, although somewhat slowly. The plug-in allows the LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target to display conditionally: the target appears on the SFX menu only when the ISSN, ISBN, or title information from the OpenURL is found in a Voyager record. CARLI tests with the summary holdings feature of the plug-in have not been successful: the feature works as documented when multiple results are found, but not when a single record with an attached summary holdings statement is found.

To implement the Z39.50 plug-in:

1. Activate LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target.
2. Activate the target's getHolding service.
3. Review and fill in the flag values in the list of Linking Parameters (L/P). Click "E" for edit. (Figure 60, Appendix A)
4. Note that Object Look-up is set to "No". (Figure 61, Appendix A)
5. Refer to Chapter 14 of the *SFX Advanced User's Guide* to install the plug-in. This will include modifying the z3950\_lookup.config file, updating the displayer, and creating a new local threshold.
6. To edit the text that appears in the SFX menu for this service type, go to Configuration > Translations & Display > Service Public Names. For example, this tool can be used to replace the default text of "Holdings in" with "We may have this in print. Please check." (Figure 62, Appendix A)

Main Additional details	
<b>Edit Target Service - LOCAL_CATALOG_EXLIBRIS_VOYAGER - getHolding</b>	
Service	getHolding
Public Name (global)	Holdings in
Public Name (local)	<input type="text"/>
	<input type="checkbox"/> Use default defined for this ServiceType
Activation status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Site down	<input type="checkbox"/> Site down date 0000-00-00 00:00:00
	Site down reason <input type="text"/>
Object Lookup (global)	No
Is free ?	No
Parser (global)	ENDEAVOR::VOYAGER
Parse Param (global)	url=\$\$LOCAL_SERVER & use_isbn_OR=\$\$USE_ISBN_OR & version=\$\$VERSION
AutoActive	This target is not an aggregator package and the default AutoActive setting is 'No'. You can overwrite this setting by using the dropdown below. <b>Aggregator Settings</b>
AutoUpdate	<input type="checkbox"/>
Displayer (global)	Z3950::Z3950
Displayer (local)	<input type="text"/>
	<input type="checkbox"/> Use default defined for this ServiceType
Use proxy	<input type="checkbox"/>
Crossref Supported	<input type="checkbox"/> No
Threshold (global)	(\$obj->need('ISBN')    \$obj->need('ISSN')    \$obj->need('bookTitle')    \$obj->need('journalTitle')    \$obj->need('@abbrevTitle'))
Threshold (local)	GLOBAL && \$obj->need('sfx.sid','ne','Endeavor:CitationServer') && \$obj->plugIn('Z3950Lookup')

Figure 6: LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target getHolding service, configured to use the Z39.50 plug-in

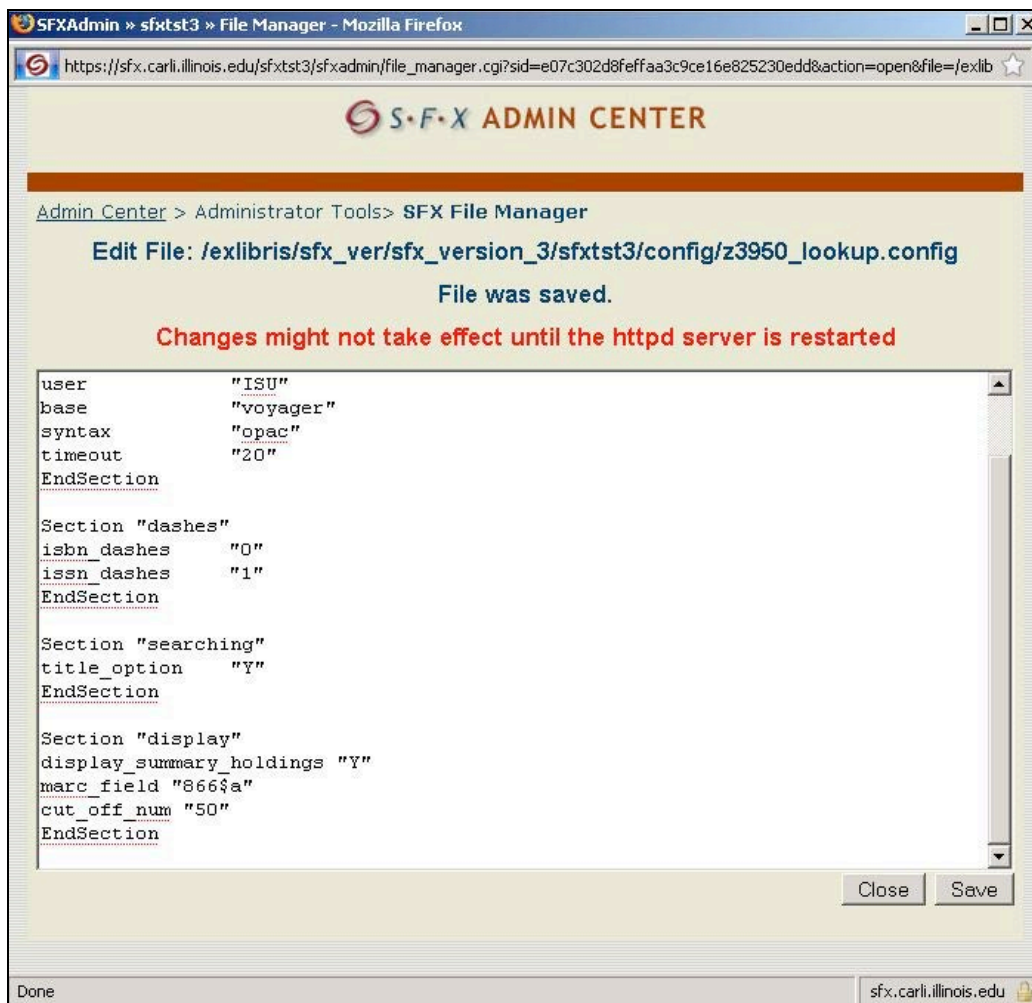


Figure 7: z3950\_lookup.config file



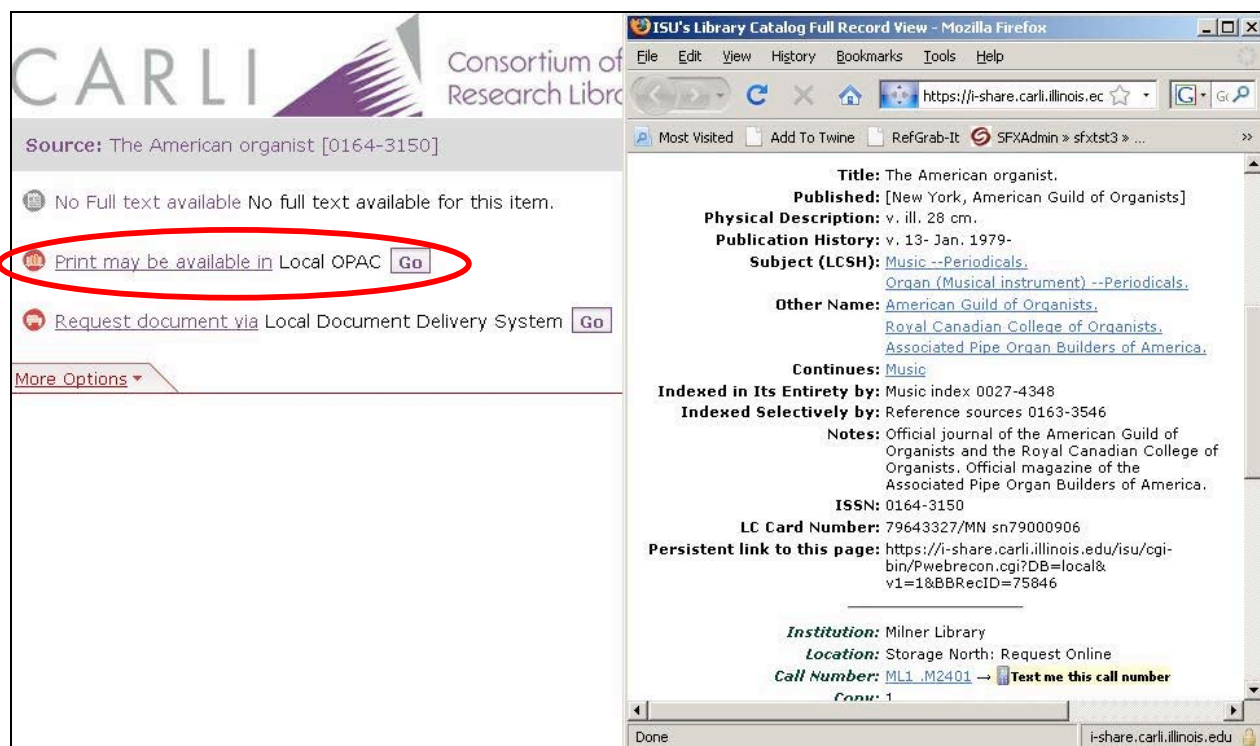


Figure 8: One result found, summary display feature turned on

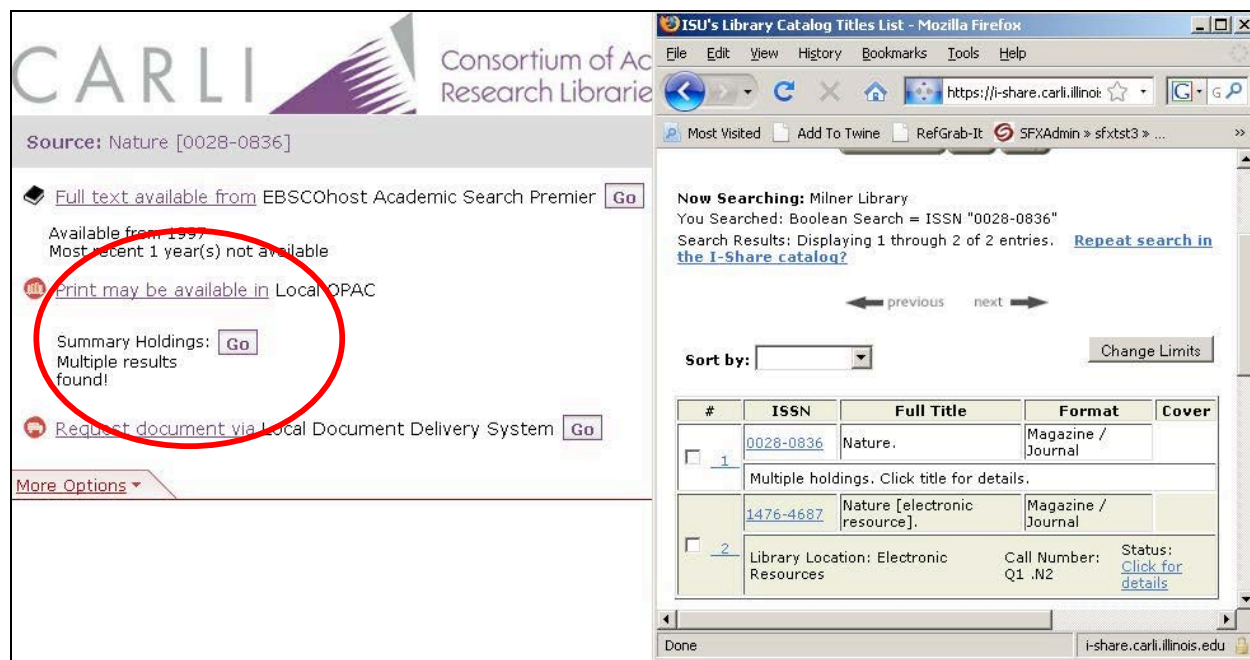


Figure 9: Multiple results found, summary display feature turned on



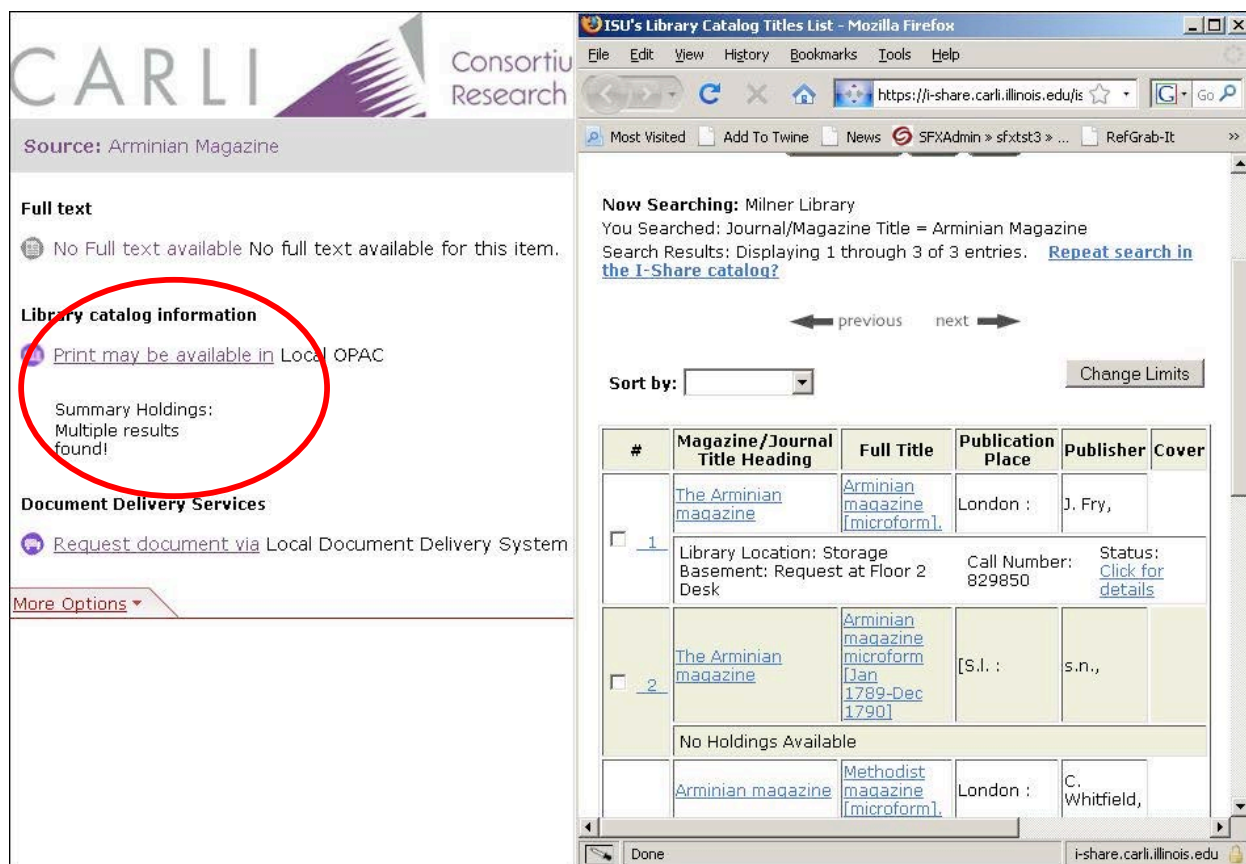


Figure 10: Example of a title search (no ISSN in OpenURL) with multiple results found

## Special Notes about the Remaining Scenarios

### Object Lookup

In Scenarios G, H and I, object portfolios representing print holdings will be activated in the LOCAL\_CATALOG target. It will be important to remain aware of the Object Lookup setting in the associated getHolding services.

If a LOCAL\_CATALOG target has Object Lookup set to “Yes,” the target will display on the SFX Menu only if the context object corresponds to an active object portfolio. This is problematic when a library chooses to activate object portfolios for serials but not for monographs. If an OpenURL contains an ISBN (that is, if it describes a book) and Object Lookup is set to “Yes,” the target link for the LOCAL\_CATALOG will not appear on the SFX menu. It is important to create a second getHolding service in the LOCAL\_CATALOG target to allow users to find items with ISBNs; otherwise SFX will never lead users to the library’s monographic holdings. Object Lookup will be set to “No” for this second getHolding service.

Example:

getHolding #1

Threshold: \$obj->need('ISBN') || \$obj->need('bookTitle')  
 Monographic title holdings: Not loaded into SFX KB  
 Object look-up: No

## getHolding #2

Threshold:     )\$obj->need('ISSN') || \$obj->need('journalTitle') ||\$obj->need('@abbrevTitle')

Serial title holdings:   Loaded into SFX KB

Object look-up:        Yes

List of Target Services for LOCAL_CATALOG_VUFIND_LCL										
Add New Service			Activate All		Deactivate All		Show All		Show Active	Show Inactive
			Delete	Activate	Deactivate					
Available: 2 services			Database: sfxaru		Target: LOCAL_CATALOG_VUFIND_LCL			<a href="#">[Back to Target]</a>		
#			Service	Parser	Threshold		Modified	Active	Action	
<input type="checkbox"/>	1	E	V	getHolding	ENDEAVOR::VUFIND	(\$obj->need('ISBN')    \$obj->need('bookT...	+L/P	2012/01/13		C
<input type="checkbox"/>	2	E	V	getHolding	ENDEAVOR::VUFIND	(\$obj->need('ISSN')    \$obj->need('journ...	P +L/P	2011/10/25		C

Figure 11: Two getHolding services, one for items with ISBNs and the other for items with ISSNs

## Adding Object Portfolios

Part II of this document explains in detail how to add object portfolios to a LOCAL\_CATALOG target to make print serials accessible via SFX. Chapter 3 of the *SFX General User's Guide* provides even more detail. The following is a brief overview of the process.

1. Set Object Lookup to “Yes” in the getHolding service to which you would like to add object portfolios.
2. Obtain a list of ISSNs for the print holdings you want to make available via SFX and save them as a column in a tab-delimited \*.txt file. ISBNs, LCCNs, and Object IDs are also acceptable primary keys, but you can only upload one kind at a time.
3. In the DataLoader:
  - a. Select the appropriate “Target+Service” from the dropdown list.
  - b. Browse to select the input file of ISSNs.
  - c. Select “ISSN” in the Column 1 dropdown list.
  - d. In the Load Type section, check the “Add Portfolios” box.
  - e. Click the “Submit” button.
4. Local threshold, parser, parse param, availability, authentication, and note information can also be uploaded using additional columns in the spreadsheet. If you wish to add this information at a later date, you would check the “Update Portfolios” box at that time.

## Example Scenarios (continued)

### [G] Activate OPAC target. Activate object portfolios for titles in target. Load volume holdings as notes.

For serials, the LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target appears conditionally on the SFX menu at Library G: it appears only when information from an incoming OpenURL matches an active object portfolio. The librarians activated object portfolios for print serial titles using data extracted from Voyager. Combining holdings statements for multiple locations and formats into syntactically correct thresholds would have required extensive manipulation on a title-by-title basis, so they decided it would be sufficient to record location, call number, year, and volume information in the note field for each object portfolio.

To replicate this scenario, follow the instructions in Part II of this document.

The screenshot shows a web form titled 'Edit Object Portfolio - LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER - getHolding'. The form has two tabs: 'Main' and 'Additional details'. The 'Main' tab is active. The form contains the following fields and values:

Field	Value
Object ID	954921332001
ISSN (PRINT)	0000-0019
Title	Publishers weekly
General description	
Availability	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Target Service Parser	ENDEAVOR::VOYAGER
Parser(global)	
Parse Param (global)	
Use proxy	<input type="checkbox"/>
Threshold (global)	
Authentication note	
General note	Level 3 Z1219 .P98 v.222(1982)-v.238(1991)
Internal description	

Buttons: Compose, Clear

Figure 12: Library G's holdings information indicated in note field

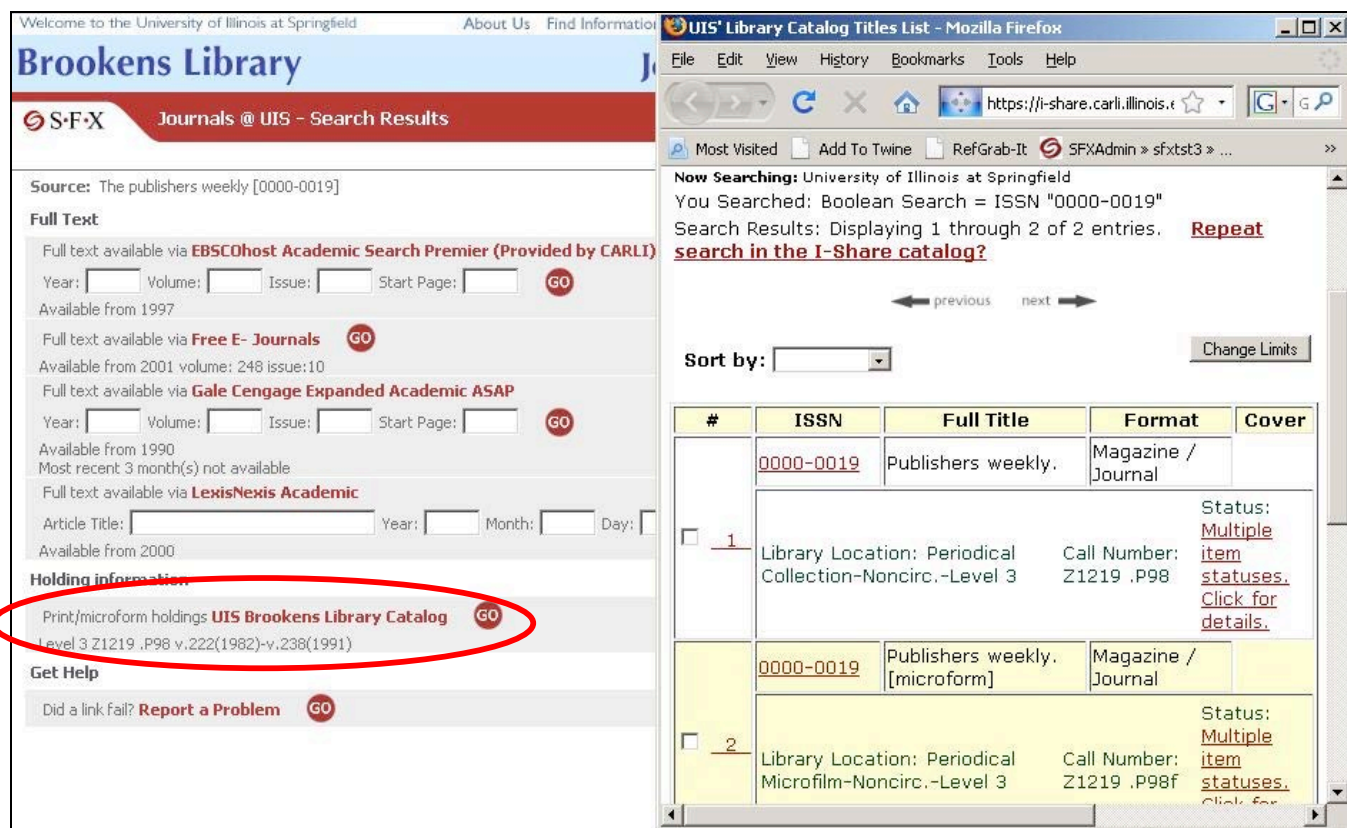


Figure 13: Holdings information as displayed in a note field

**[H] Activate OPAC target. Activate object portfolios for titles in target. Load volume holdings as thresholds.**

For serials, the LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target appears conditionally on the SFX menu at Library H: it appears only when information from an incoming OpenURL matches an active object portfolio *and* passes its threshold tests. The librarians activated object portfolios for print serial titles using data extracted from Voyager. Year, volume, and issue information from Voyager was converted to threshold statements and uploaded for each object portfolio. Librarians also felt it was necessary to provide additional information about location and format in the note field for every object portfolio. It should be noted that this last step is not required in order to implement this scenario successfully.

To replicate this scenario, follow the instructions in Part II of this document.

Main Additional details	
Edit Object Portfolio - LOCAL_CATALOG_EXLIBRIS_VOYAGER - getHolding	
Object ID	110978977275632
ISSN (PRINT)	0003-0953
Title	The American school board journal
General description	
Availability	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Target Service Parser	ENDEAVOR::VUFIND
Parser(global)	
Parse Param (global)	
Use proxy	<input type="checkbox"/>
Threshold (global)	\$obj->parsedDate(">=",1995,182,1)
	<a href="#">Compose</a> <a href="#">Clear</a>
Authentication note	
General note	Oesterle Library has: Current Periodicals -- Current year; Bound Periodicals -- v.191-198 (2004-2011) Single Issues; Microfiche -- v.182-190 (1995-2003)

Figure 14: Library H's object portfolio threshold and supporting note field

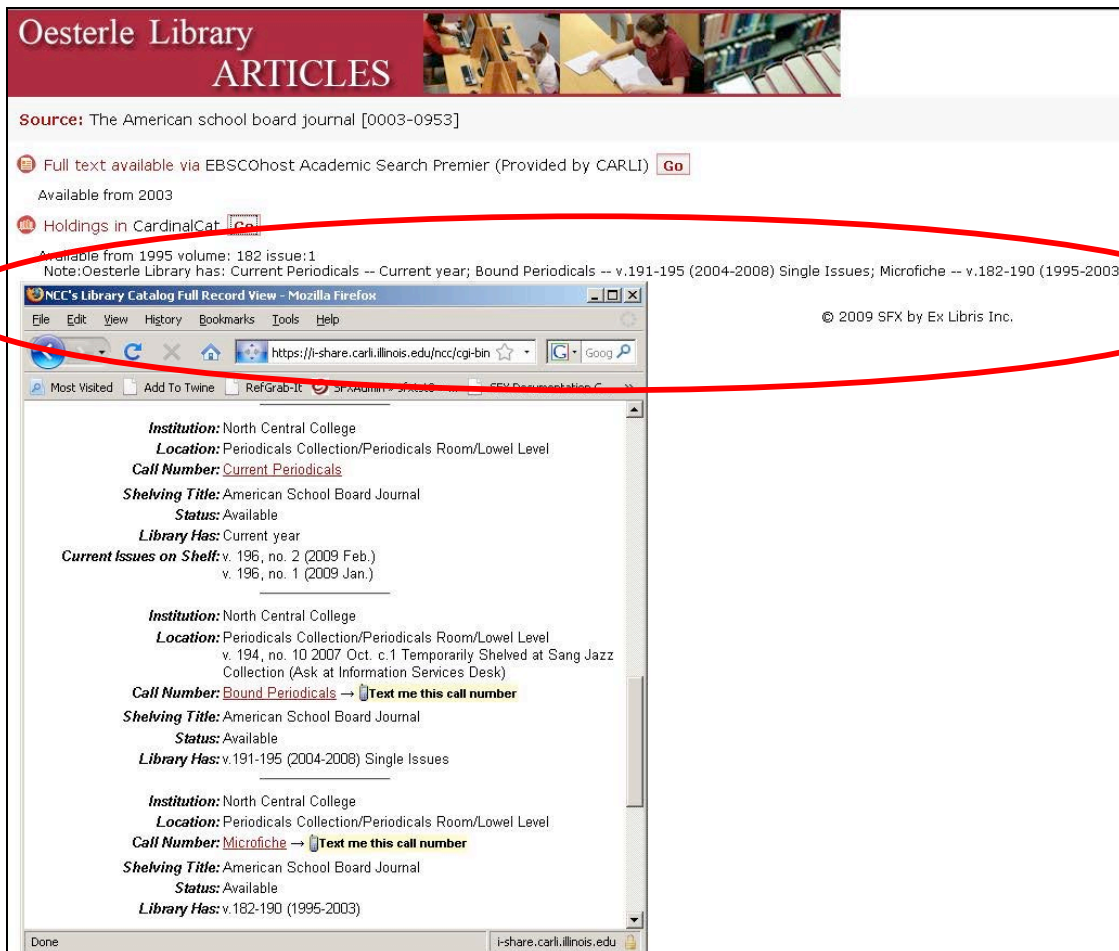


Figure 15: Library H's holdings information displayed as a threshold and a note

# **[I1] Activate OPAC target. Activate object portfolios for titles in target. Don't load volume holdings.**

The LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target appears on the SFX menu conditionally at Library I1: it appears only when information from an incoming OpenURL matches an active object portfolio. The librarians activated object portfolios for print serial titles using data extracted from Voyager. No threshold information was applied to the object portfolios, and no portfolio-level notes were added.

To replicate this scenario, follow the instructions in Part II of this document.



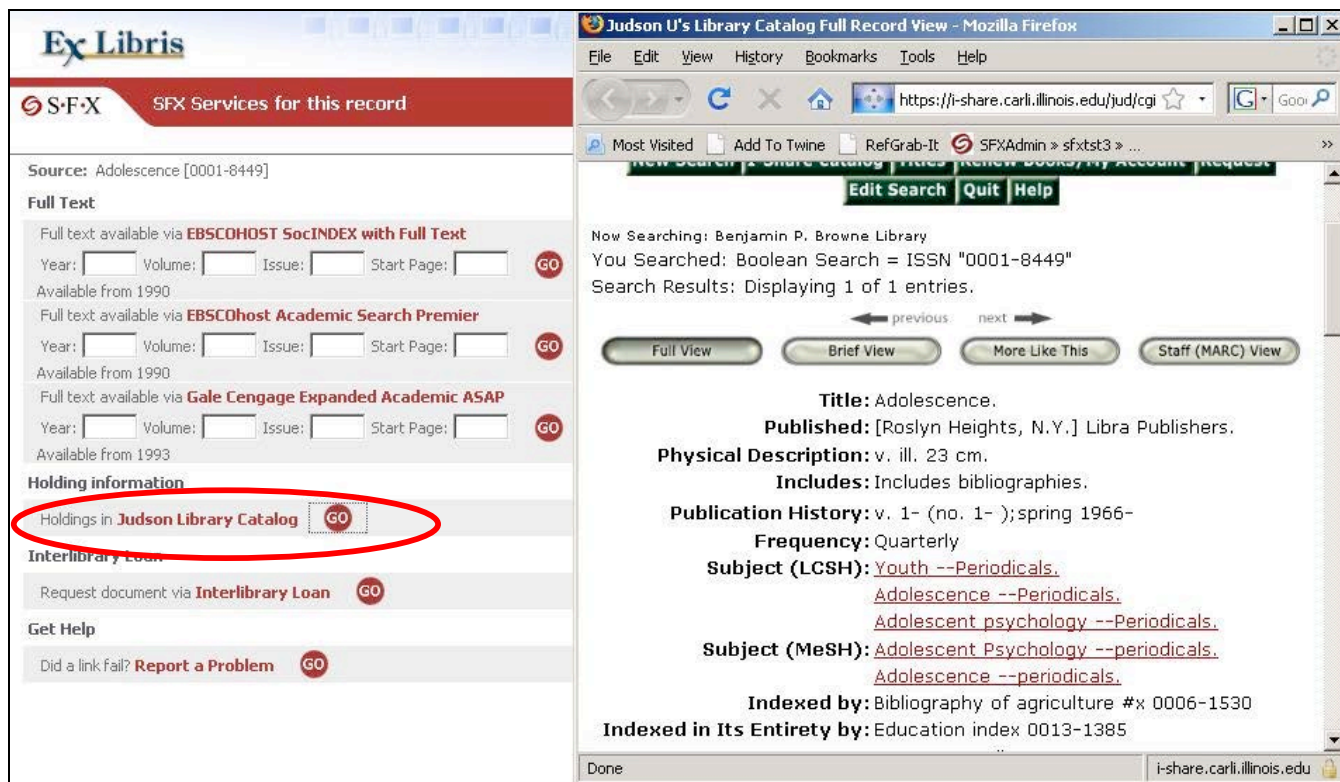


Figure 16: OpenURL metadata corresponds to an active object portfolio, so OPAC target appears

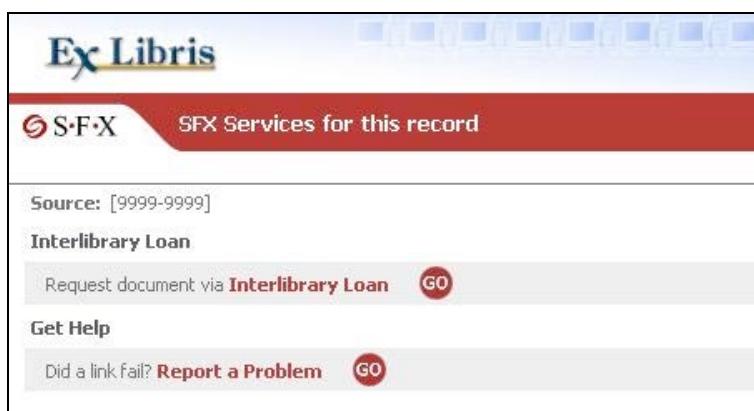


Figure 17: OpenURL metadata does not correspond to an active object portfolio, so the OPAC Target does not appear

**[I2] Create a local, parserless (un-hyperlinked) target. Activate object portfolios for titles in target. Display un-hyperlinked message of ownership in SFX menu. Don't load volume holdings.**

For serial titles, the Local Serials List target appears on the SFX menu conditionally at Library I2: it appears only when information from an incoming OpenURL matches an active object portfolio. The librarians at Library I2 have only just begun to maintain records for their print serials in their catalog; currently there is no web-accessible list of titles. An internal list of titles was used to activate object portfolios in the local target. No threshold information was applied to the object portfolios. To lead users to these items via the SFX menu, the library decided that an un-hyperlinked message of ownership was sufficient.



To replicate this scenario, follow the instructions in Part II of this document.

The screenshot shows the 'Edit Target' form. The 'Main' tab is selected. The 'Target' field is set to 'LOCAL\_PARKLAND\_P\_LCL'. The 'Public name(global)' field is 'Available in the Library'. The 'General description' field is empty. The 'Activation status' is set to 'Inactive'. The 'Threshold (global)' field is empty. The 'Character Set' is 'iso-8859-1'. The 'Aggregator?' checkbox is unchecked. The 'Authentication note' field is empty. The 'General Note' field contains the text 'If you need help finding the right volume, please ask a librarian.', which is circled in red.

Figure 18: Static target-level message advertising assistance

The screenshot shows the 'Edit Target Service' form. The 'Main' tab is selected. The 'Service' field is set to 'getHolding'. The 'Public Name (global)' field is 'Parkland Library owns t'. The 'Description' field is empty. The 'Activation status' is set to 'Active'. The 'Site down' section has 'Site down date' set to '0000-00-00 00:00:00' and 'Site down reason' is empty. The 'Object Lookup (global)' checkbox is checked. The 'Is free?' checkbox is unchecked. The 'Parser (global)' field is empty. The 'Parse Param (global)' field is empty. The 'AutoActive' field has a note: 'This target is not an aggregator package and the default AutoActive setting is 'No'. You can overwrite this setting by using the dropdown below.'

Figure 19: Library I2's getHolding target service settings, with no target parser and Object Lookup set to Yes

**List of Portfolios for LOCAL\_PARKLAND\_PRINT\_LCL**

[Add New Portfolio](#)
[Activate All](#)
[Deactivate All](#)
[Show All](#)
[Show Active](#)
[Show Inactive](#)

[Delete](#)
[Activate](#)
[Deactivate](#)

Show  portfolios per page

Find portfolio by  [Go](#) Showing page 1 of 20 Jump to page  [Jump](#)

Available: 393 portfolios Database: sfxprk [Back to Target](#) [Back to List of Services](#)

#	Service	Object	Title	Threshold	Mod.	Act.	Actions
<input type="checkbox"/> 1	E V	getHolding	<a href="#">0001-2092</a>	AORN journal	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 2	E V	getHolding	<a href="#">0001-8481</a>	Adult education	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 3	E V	getHolding	<a href="#">0001-8554</a>	Adult leadership	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 4	E V	getHolding	<a href="#">0001-8899</a>	Advertising Age	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 5	E V	getHolding	<a href="#">0001-8996</a>	The Advocate	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 6	E V	getHolding	<a href="#">0002-7375</a>	American Artist	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 7	E V	getHolding	<a href="#">0002-8177</a>	The Journal of the American Dental Associa...	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 8	E V	getHolding	<a href="#">0002-8223</a>	Journal of the American Dietetic Association	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 9	E V	getHolding	<a href="#">0002-8541</a>	American Forests	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 10	E V	getHolding	<a href="#">0002-8738</a>	American Heritage	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 11	E V	getHolding	<a href="#">0002-936X</a>	American journal of nursing	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 12	E V	getHolding	<a href="#">0002-9769</a>	American libraries	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 13	E V	getHolding	<a href="#">0003-066X</a>	The American psychologist	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 14	E V	getHolding	<a href="#">0003-0937</a>	The American Scholar	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 15	E V	getHolding	<a href="#">0003-1224</a>	American sociological review	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 16	E V	getHolding	<a href="#">0003-1488</a>	Journal of the American Veterinary Medical...	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>
<input type="checkbox"/> 17	E V	getHolding	<a href="#">0003-1496</a>	American vocational journal	2011/05/17	✓	<a href="#">C</a> <a href="#">S</a>

Figure 20: Library I2's object portfolios, loaded into locally-defined, parserless target

**Ex Libris**

**SFX** SFX Services for this record

Source: The publishers weekly [0000-0019] yr:2004

**Basic**

**Full Text**

Full text available via **EBSCOhost Academic Search Premier (Provided by CARLI)**

Year:  Volume:  Issue:  Start Page:  [GO](#)

Full text available via **LexisNexis Academic**

Article Title:  Year:  Month:  Day:  [GO](#)

**Holding information**

Parkland Library owns this title **Available in the Library**

If you need help finding the right volume, please ask a librarian.

Holdings in **1-Share Classic** [GO](#)

**Get Help**

Find related information in **Need help?** [GO](#)

Did a link fail? **Report a Problem** [GO](#)

Figure 21: Library I2's un-hyperlinked print holdings message (the red text "Available in the library" is not hyperlinked)

## Part II

### Section 1: Retrieving print journal title data from Voyager

The primary data needed to upload print title information to an SFX instance are ISSNs. ISSNs can be gathered from an Access report run against a local Voyager database. (If print title information is maintained in a non-Voyager database that includes the ISSN for each title, it too can be used to activate object portfolios in SFX.)

CARLI has developed an SQL query that is, by design, broad in its scope. The only criterion it uses as a limit is the bib record's leader value of "s" (for serials) in the Bibliographic Level field. The output includes ISSN, Title, Publisher, Publication status, Location name, and the 866, 853 and 863 fields from linked MFHDs. The output fields other than ISSN are included in the query to help the library decide if the individual titles are appropriate for uploading to the local SFX instance. It is expected that some libraries will add additional criteria to this query (e.g., limit to specific locations) in order to narrow the output. See Appendix B of this document for the query. Libraries may wish to run this query and export the results to an Excel file. The Excel file can then be manipulated as needed to create the input file needed to activate object portfolios in an SFX instance.

Techniques for dealing with journal titles that do not have ISSNs can be found in Sections 5 and 6 of Part II of this document. The instructions in Section 1 assume that the library wishes to load all appropriate print title information for records that currently contain an ISSN, and that the library will deal with non-ISSN titles at a later date.

In the screen shot below, this library has elected to limit the query to locations that begin with "Periodical" but no other criteria were applied. Because one bibliographic record can have more than one MFHD/location, sometimes there are multiple rows in this file that represent the same journal title. This is not a problem for the SFX DataLoader tool, and library staff are not required to de-duplicate the ISSNs in the input file.

A	B	C	D	E	F
ISSN	TITLE	PUBLISHER	Publication	LOCATION_NAME	866
0003-4827	Annals of Iowa.	Iowa State Historical Dept., Division	c	Periodical volumes	0 v.40(1969-1971)-v.45(1979-1981)
0304-4130	European journal of political research.	Elsevier.	c	Periodical volumes	0 v.1(1973)-v.43(2004)
0304-4130	European journal of political research.	Elsevier.	c	Periodical Current	
0039-2499	Stroke.	American Heart Association, inc.]	c	Periodical volumes	0 v.8(1977)-v.12(1981)
0022-2488	Journal of mathematical physics.	American Institute of Physics,	c	Periodical volumes	0 v.33(1992)-v.46(2005 Feb)
0022-2488	Journal of mathematical physics.	American Institute of Physics,	c	Periodical Current	
0037-7961	Social service review.	University of Chicago Press [etc.]	c	Periodical volumes	0 v.44(1970)-v.78(2004)
0037-7961	Social service review [microform].	University of Chicago Press,	c	Periodical volumes	0 v.44(1970)-v.78(2004)
0037-7961	Social service review.	University of Chicago Press [etc.]	c	Periodical Current	
0037-7961	Social service review [microform].	University of Chicago Press,	c	Periodical Current	
0022-0167	Journal of counseling psychology.	American Psychological Associati	c	Periodical volumes	0 v.1(1954)-v.51(2004)
0022-0167	Journal of counseling psychology.	American Psychological Associati	c	Periodical Current	
0734-6670	Journal of college admissions : [journal of t	The Association,	c	Periodical volumes	0 (1984)-(2002)II0 v.25(1980-1981)
0027-8599	National ACAC journal.	National Association of College Ad	c	Periodical volumes	0 (1984)-(2002)II0 v.25(1980-1981)
0734-6670	Journal of college admissions : [journal of t	The Association,	c	Periodical Current	
0009-5982	Chronicle of higher education [microform].	Chronicle of Higher Education,	c	Periodical Microforms	0 Microfilm v.1(1966-1967)-v.50(2
0009-5982	Chronicle of higher education.	Chronicle of higher education, etc.]	c	Periodical Microforms	0 Microfilm v.1(1966-1967)-v.50(2
0737-8831	Library hi tech.	Pierian Press,	c	Periodical volumes	0 v.3(1985)-v.20(2002)
0737-8831	Library hi tech.	Pierian Press,	c	Periodical Current	
0021-843X	Journal of abnormal psychology.	American Psychological Associati	c	Periodical volumes	0 v.23(1928-1929)-v.113(2004)
0096-851X	Journal of abnormal and social psychology.	Boyd Printing,	d	Periodical volumes	0 v.23(1928-1929)-v.113(2004)
0021-843X	Journal of abnormal psychology.	American Psychological Associati	c	Periodical Current	
0017-8012	Harvard business review.	Graduate School of Business Adm	c	Periodical Current	
0017-8012	Harvard business review [microform].	Harvard University,	c	Periodical Current	
0090-2918	Health services reports.	Health Services Administration,	d	Periodical volumes	0 77(1962)-v.119(2004)II0 v.73(199
0033-3549	Public health reports.	U.S. Dept. of Health, Education, and	c	Periodical volumes	0 77(1962)-v.119(2004)II0 v.73(199
0090-2918	Health services reports.	Health Services and Mental Health	d	Periodical volumes	0 77(1962)-v.119(2004)II0 v.73(199
0094-6214	Public health reports / issued by the Surge	The Service,	d	Periodical volumes	0 77(1962)-v.119(2004)II0 v.73(199
0083-1204	HSMA health reports.		d	Periodical volumes	0 77(1962)-v.119(2004)II0 v.73(199
0090-2918	Health services reports.	Health Services Administration,	d	Periodical Current	
0033-3549	Public health reports.	U.S. Dept. of Health, Education, and	c	Periodical Current	
0090-2918	Health services reports.	Health Services and Mental Health	d	Periodical Current	
0094-6214	Public health reports / issued by the Surge	The Service,	d	Periodical Current	
0083-1204	HSMA health reports.		d	Periodical Current	

Figure 22: Query output

After manipulating the file to verify and winnow as appropriate, sort by ISSN, then delete rows where the ISSN field is blank. Delete all columns other than ISSN. Delete any column headers in the file.

In the first row, add the word “**ACTIVE**” (case sensitive, without quotes). Copy the value ACTIVE into each cell in Column B for which an ISSN is present in Column A. Save the file as tab-delimited text (\*.txt) using a name that does not have any spaces. Note the number of rows in the file. This information will be useful when the output reports from the data load are examined.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
0000-0019	ACTIVE												
0000-0019	ACTIVE												
0000-0027	ACTIVE												
0000-0027	ACTIVE												
0000-0027	ACTIVE												
0000-0051	ACTIVE												
0001-0235	ACTIVE												
0001-0235	ACTIVE												
0001-026X	ACTIVE												
0001-026X	ACTIVE												
0001-026X	ACTIVE												
0001-026X	ACTIVE												

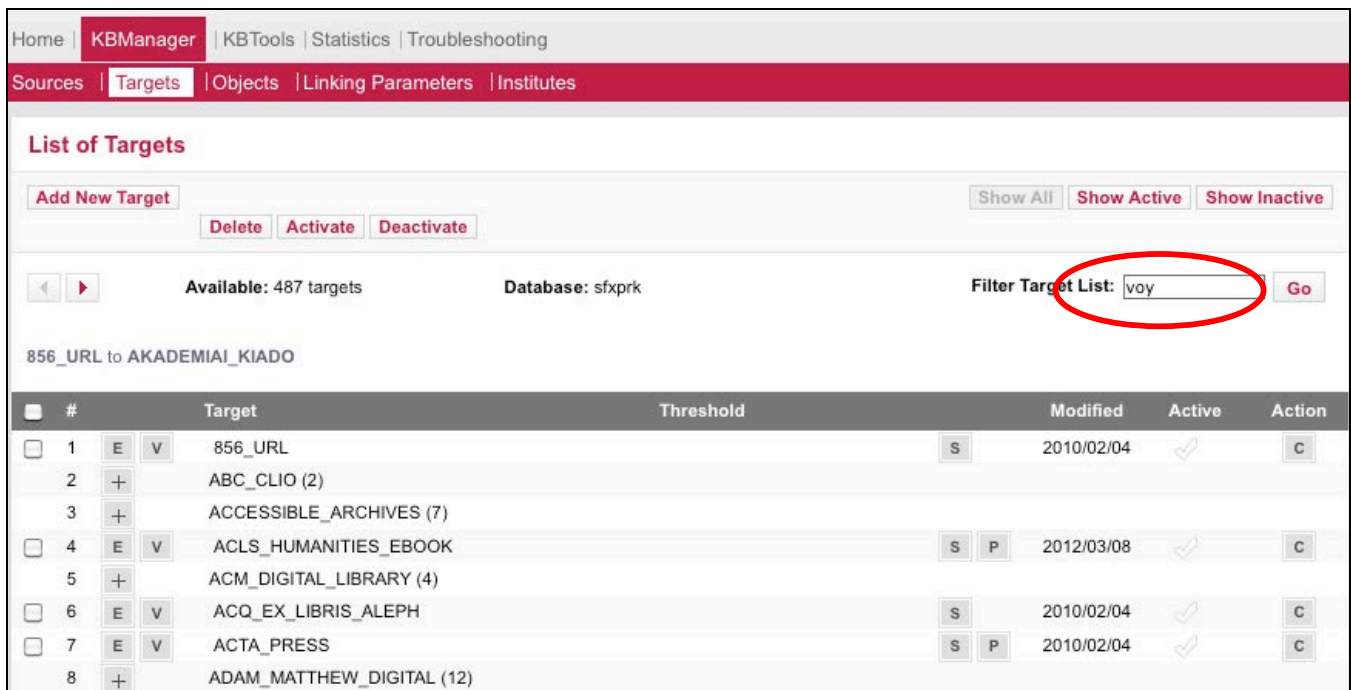
Figure 23: File to Upload

## Section 2: Preparing the LOCAL\_CATALOG target for object portfolios

The next step is to activate the target and target service, and to set the option to allow Object Lookup for the Local Catalog. (These steps may have been done previously.)

To activate the LOCAL\_CATALOG target:

1. Go to **KBManager** and click on **Targets**.
2. Set the view to “Show all” and enter “**voy**” (without the quotes) in the **Filter Target List** box, then click the **Go** button.



Home | **KBManager** | KBTools | Statistics | Troubleshooting

Sources | **Targets** | Objects | Linking Parameters | Institutes

### List of Targets

[Add New Target](#) [Show All](#) [Show Active](#) [Show Inactive](#)

[Delete](#) [Activate](#) [Deactivate](#)

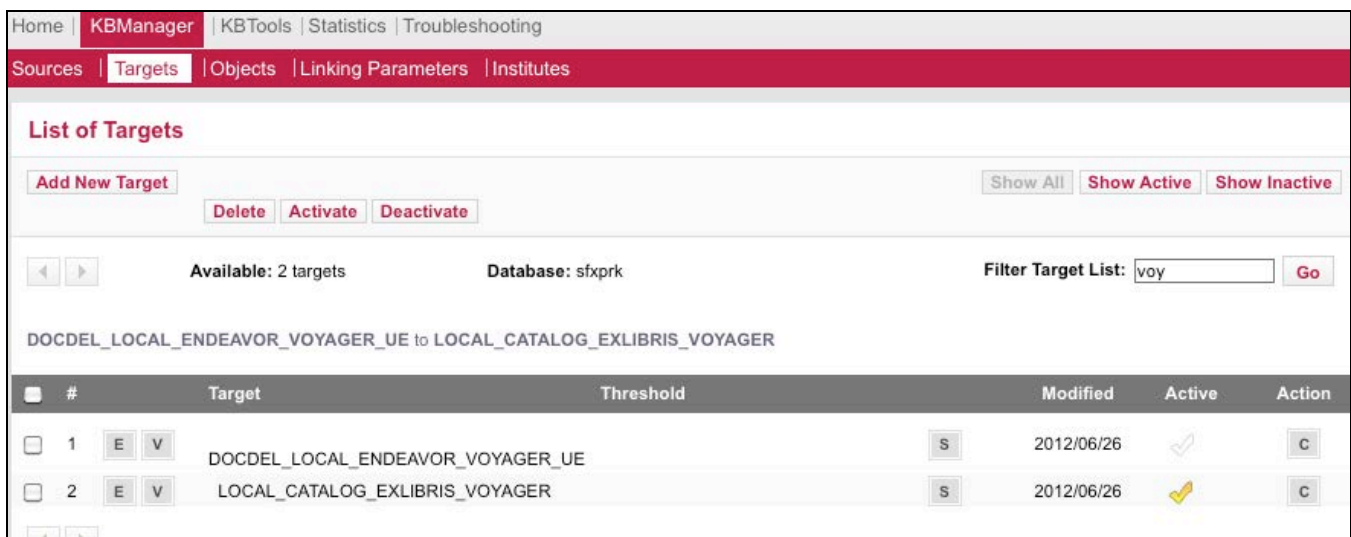
Available: 487 targets Database: sfxprk Filter Target List:  [Go](#)

856\_URL to AKADEMIAI\_KIADO

#	Target	Threshold	Modified	Active	Action
1	856_URL	S	2010/02/04	<input checked="" type="checkbox"/>	<a href="#">C</a>
2	ABC_CLIO (2)				
3	ACCESSIBLE_ARCHIVES (7)				
4	ACLS_HUMANITIES_EBOOK	S P	2012/03/08	<input checked="" type="checkbox"/>	<a href="#">C</a>
5	ACM_DIGITAL_LIBRARY (4)				
6	ACQ_EX_LIBRIS_ALEPH	S	2010/02/04	<input checked="" type="checkbox"/>	<a href="#">C</a>
7	ACTA_PRESS	S P	2010/02/04	<input checked="" type="checkbox"/>	<a href="#">C</a>
8	ADAM_MATTHEW_DIGITAL (12)				

Figure 24: Search for the Voyager target

3. When the screen refreshes, click the checkmark in the Active column to activate the target.



Home | **KBManager** | KBTools | Statistics | Troubleshooting

Sources | **Targets** | Objects | Linking Parameters | Institutes

### List of Targets

[Add New Target](#) [Show All](#) [Show Active](#) [Show Inactive](#)

[Delete](#) [Activate](#) [Deactivate](#)

Available: 2 targets Database: sfxprk Filter Target List:  [Go](#)

DOCDEL\_LOCAL\_ENDEAVOR\_VOYAGER\_UE to LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER

#	Target	Threshold	Modified	Active	Action
1	DOCDEL_LOCAL_ENDEAVOR_VOYAGER_UE	S	2012/06/26	<input checked="" type="checkbox"/>	<a href="#">C</a>
2	LOCAL_CATALOG_EXLIBRIS_VOYAGER	S	2012/06/26	<input checked="" type="checkbox"/>	<a href="#">C</a>

Figure 25: Activate the Voyager target

- Next, click the **S** button to move to the **Target Service** level.

Home | **KBManager** | KBTools | Statistics | Troubleshooting

Sources | **Targets** | Objects | Linking Parameters | Institutes

### List of Target Services for LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER

Available: 2 services      Database: sfxprk      Target: LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER      [\[Back to Target\]](#)

#		Service	Parser	Threshold		Modified	Active	Action	
<input type="checkbox"/>	1	<input type="button" value="E"/> <input type="button" value="V"/>	getHolding	ENDEAVOR::VOYAGER	(\$obj->need('ISBN')    \$obj->need('ISSN'...	L/P	2011/05/17	<input checked="" type="checkbox"/>	<input type="button" value="C"/>
<input type="checkbox"/>	2	<input type="button" value="E"/> <input type="button" value="V"/>	getAuthor	ENDEAVOR::VOYAGER	\$obj->need('@authLast')	L/P	2010/02/04	<input checked="" type="checkbox"/>	<input type="button" value="C"/>

Figure 26: Activate the getHolding service

- Click the **L/P** button to edit the **Linking Parameters**. In the List of Linking Parameters window, click **E** to edit each value. Click **Submit**, then close the List of Linking Parameters window.
- Click the **E** button to edit the **Target Service**.
- Click **Add local** for **Object Lookup** and set the value to **Y**. Click **Add local** for **Threshold** and enter a threshold appropriate to the object portfolios you intend to load. For instance, remove references to ISBNs and book titles and leave references to serial metadata only. If the Target Service is not already active, click the **Active** radio. Then click the **Submit** button to save the changes.



**Edit Target Service - LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER - getHolding**

Service: getHolding

Public Name (global): Holdings in + Add local

Activation status: ☒ Active ☐ Inactive

Site down: ☐ Site down date: 0000-00-00 00:00:00

Object Lookup (global): No

Object Lookup (local): Y Clear local

Is free?: No

Parser (global): ENDEAVOR::VOYAGER + Add local

Parse Param (global): url=\$\$LOCAL\_SERVER & use\_isbn\_OR=\$\$USE\_ISBN\_OR & version=\$\$VERSION + Add local

AutoActive: This target is not an aggregator package and the default AutoActive setting is 'No'. You can overwrite this setting by using the dropdown below.  
Aggregator Settings

AutoUpdate: ☐

Displayer (global): + Add local

Use proxy: ☐

Crossref Supported: ? No

Threshold (global): (\$obj->need('ISSN') || \$obj->need('journalTitle') || \$obj->need('@abbrevTitle'))

Threshold (local): Clear local

Figure 27: Edit target service

This completes the steps necessary to activate/customize the LOCAL\_CATALOG target. See the *SFX Target Configuration Guide* for more information.

### Section 3: Using DataLoader to upload print title information

1. Login to the SFX Admin Center.
2. Click on the **DataLoader** link under **KBTools**. (For more details on using DataLoader, see Chapter 4 of the *SFX General User's Guide*.)

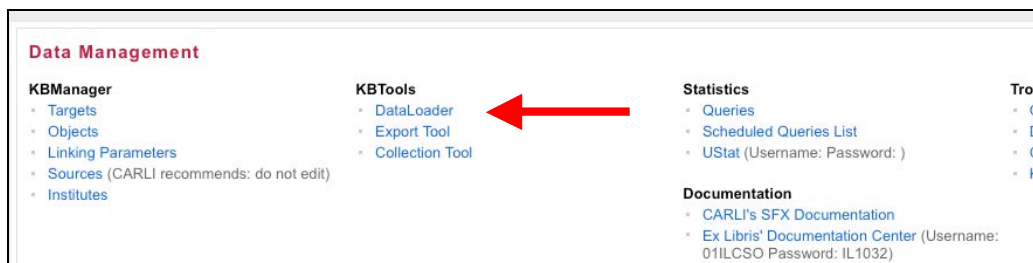


Figure 28: DataLoader

To activate object portfolios, complete the following steps:

1. Click on the **Browse** button and select the tab-delimited file of ISSNs created in the previous section.



2. In the **Select Target Service** drop-down menu, select **LOCAL\_CATALOGUE\_ENDEAVOR\_VOYAGER-getHolding**. If you do not see it listed, go back to the **Target** and confirm that **Object Lookup** is set to “**Yes**” for the getHolding service.
3. In the **Column 1 (Primary Key)** drop-down menu, select **ISSN**
4. In the **Column 2** drop-down menu, select **ACTIVATION\_STATUS**
5. In the **Load Type** box, click **Add Portfolios**
6. (OPTIONAL) In the Load Type box, there is an option to run the load in **Report** (e.g., test) **Mode**. This will show what would happen in the data load, but without any changes actually being written to the database. The CARLI Office recommends that libraries use this option, especially for a first-time run with DataLoader. However, use of this option is at the library’s discretion.
7. When all required values have been set, click the **Submit** button to start the data load.
8. Wait for the file to be processed. Depending on the size of the input file, this may take several minutes.

The screenshot shows the 'DataLoader' web application interface. At the top, there are navigation tabs: 'Home', 'KBManager', 'KBTools' (selected), 'Statistics', and 'Troubleshooting'. Below these are sub-tabs: 'DataLoader' (selected), 'Export Tool', and 'Collection Tool'. The main heading is 'Welcome to DataLoader'. Underneath, there are three buttons: 'Portfolios' (selected), 'Update Objects', and 'Add/Remove Objects'. The interface is divided into three main sections:

- Specify input file/target service:**
  - 'Select Target + Service:' dropdown is set to 'LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER-getHolding'.
  - 'Specify input file name:' text box contains '2issns2load2opacTargets.tx' with a 'Browse...' button next to it.
- Specify content of the input file:**
  - 'Select the type of each column in your input file:'
  - 'Column 1 (Primary Key)' dropdown is set to 'ISSN'.
  - 'Column 2' dropdown is set to 'ACTIVATION\_STATUS'.
  - 'Column 4' dropdown is empty.
  - 'Column 5' dropdown is empty.
  - 'Column 7' dropdown is empty.
  - 'Column 8' dropdown is empty.
- Specify load type:**
  - 'Load Type' section contains four checkboxes:
    - ☒ Add Portfolios
    - ☐ Update Portfolios
    - ☐ Remove Portfolios
    - ☐ Activate targets(s) / target\_service(s)
    - ☒ Report Mode - Do Not Update the Database

**Figure 29: Activating Object Portfolios**

Once the file processing has completed, this screen displays:

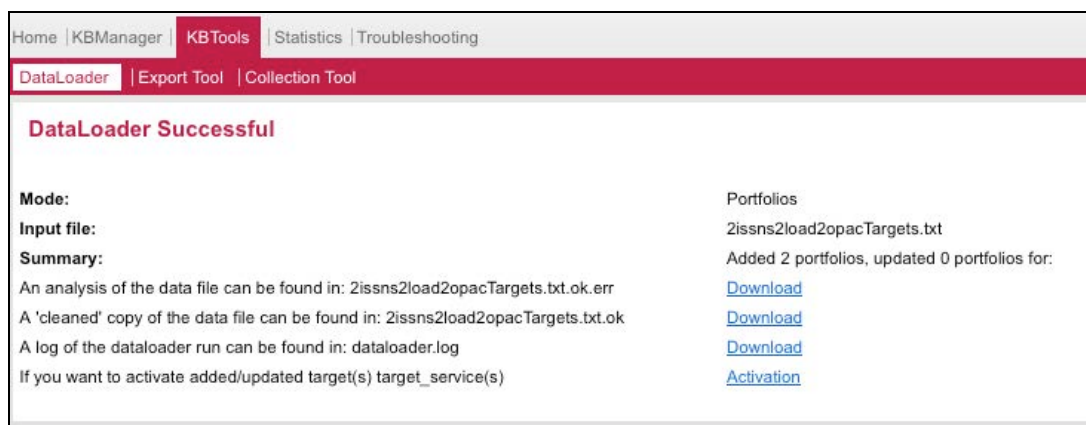


Figure 30: DataLoader Successful screen

## Section 4: Review output reports: Analysis of the Data File

The output reports from a load can either be viewed on-screen or downloaded to the workstation. The CARLI Office recommends that the library download the files locally, because once this browser window is closed, the library cannot retrieve the output files via the SFX Admin Center. (If the browser window is closed without the first two files having been downloaded, the library can contact the CARLI Office and CARLI staff can retrieve these files manually and make them available to the library.) These output reports are tab-delimited text files. For best viewing and sorting of the results, open the output files with Excel.

The primary (and most important) output file is the “**analysis of the data file**” report. The following is a sample of titles for which object portfolios have been loaded.

21	Report	Added	0000-0001	Added portfolio with id=<TBD>				
22	Report	Added	0001-0235	Added portfolio with id=<TBD>				
23	Report	Added	0001-0235	Added portfolio with id=<TBD>				
24	Report	Added	0001-026X	Added portfolio with id=<TBD>				
25	Report	Added	0001-026X	Added portfolio with id=<TBD>				
26	Report	Added	0001-026X	Added portfolio with id=<TBD>				
27	Report	Added	0001-026X	Added portfolio with id=<TBD>				
28	Report	Added	0001-0278	Added portfolio with id=<TBD>				
29	Report	Added	0001-0278	Added portfolio with id=<TBD>				
30	Report	Added	0001-0278	Added portfolio with id=<TBD>				
31	Report	Added	0001-0278	Added portfolio with id=<TBD>				
32	Report	Added	0001-0383	Added portfolio with id=<TBD>				
33	Report	Added	0001-0456	Added portfolio with id=<TBD>				
34	Report	Added	0001-0782	Added portfolio with id=<TBD>				
35	Report	Added	0001-0782	Added portfolio with id=<TBD>				

Figure 31: Added Object Portfolios

1. Sort the output report by Column B, descending. This will sort all non-Added transactions to the top of the file.
2. Review rows with the statuses outlined below.

	A	B	C	D	E	F	G
1	Report	Translate	0161-1445	Translated 0161-1445 into 0736-2064			
2	Report	Translate	0162-9867	Translated 0162-9867 into 0891-6616			
3	Report	Translate	0162-9867	Translated 0162-9867 into 0891-6616			
4	Report	Translate	0335-838X	Translated 0335-838X into 0035-838X			
5	Report	Translate	0335-838X	Translated 0335-838X into 0035-838X			
6	Report	Translate	0521-1123	Translated 0521-1123 into 0508-3443			
7	Report	Translate	0567-6568	Translated 0567-6568 into 0997-4482			
8	Report	Translate	1537-0429	Translated 1537-0429 into 0882-6404			
9	Report	Translate	1547-0148	Translated 1547-0148 into 1547-0156			
10	Report	Translate	1548-1867	Translated 1548-1867 into 0022-2922			
11	Report	Translate	1548-1867	Translated 1548-1867 into 0022-2922			
12	Report	Translate	1553-3794	Translated 1553-3794 into 0745-7065			
13	Report	Translate	1553-3794	Translated 1553-3794 into 0745-7065			
14	Report	Translate	1553-7544	Translated 1553-7544 into 1089-5914			
15	Report	Total	7937	Added 7937 portfolios			
16	Report	Total	0	Updated 0 portfolios			
17	Report	NotExist	0006-9221	No object with that ISSN found			
18	Report	NotExist	0011-4049	No object with that ISSN found			
19	Report	NotExist	0011-4049	No object with that ISSN found			
20	Report	NotExist	0012-2815	No object with that ISSN found			
21	Report	NotExist	0012-3803	No object with that ISSN found			
22	Report	NotExist	0012-3803	No object with that ISSN found			
23	Report	NotExist	0012-866X	No object with that ISSN found			
24	Report	NotExist	0015-5136	No object with that ISSN found			
25	Report	NotExist	0015-5136	No object with that ISSN found			

Figure 32: review statuses other than "Added"

### Report status of "Translate"

Entries with a value of "Translate" mean that the ISSN in the input file matched an alternative ISSN value in SFX's KnowledgeBase. For example, the **Search Objects** function of SFX Admin Center returns an object entry for the ISSN 0161-1445. In this case, the ISSN from the Voyager database represents the e-ISSN instead of the print ISSN. SFX uses the print ISSN as the primary key, so DataLoader translated the e-ISSN to the print ISSN when the object portfolio was activated. An OpenURL that contains either an ISSN or an e-ISSN will match this activated object portfolio.

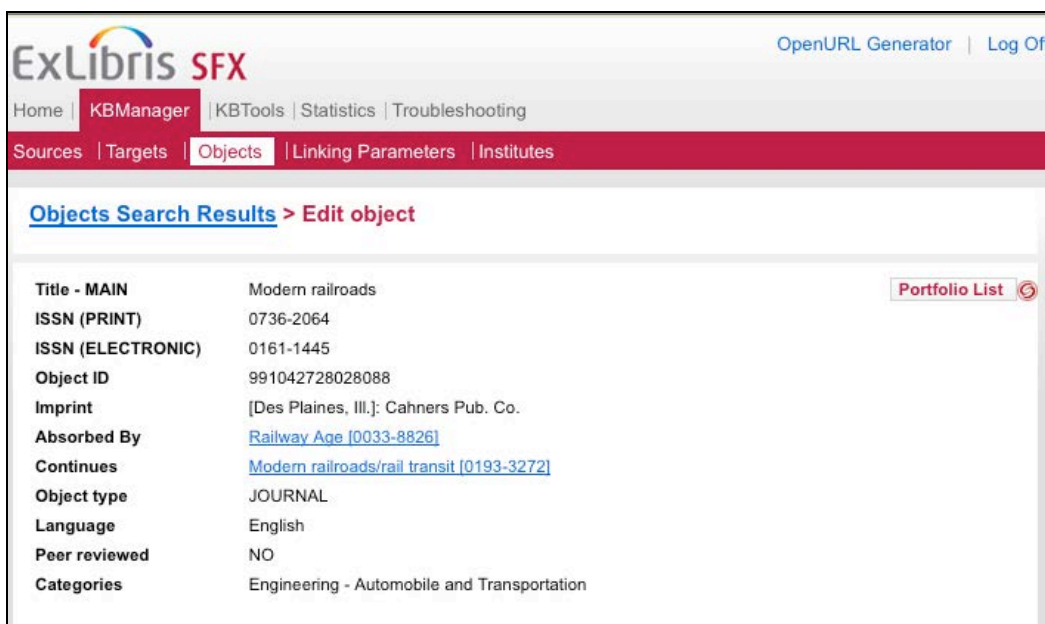


Figure 33: Example object displaying both ISSN and eISSN data

No action is needed on the library's part as a result of "Translate" entries, for SFX purposes. However, the library may want to investigate the ISSN found in the Voyager bibliographic record to determine if it is the correct value for the particular bib record.

### Report status of "NotExist"

Entries with a value of "NotExist" mean that the ISSN in the input file did not find any matches in SFX's global KnowledgeBase, and therefore this journal title was not uploaded into the library's SFX instance.

17	Report	NotExist	0006-9221	No object with that ISSN found	
18	Report	NotExist	0011-4049	No object with that ISSN found	
19	Report	NotExist	0011-4049	No object with that ISSN found	
20	Report	NotExist	0012-2815	No object with that ISSN found	

Figure 34: NotExist status

Libraries will want to investigate these titles in the local Voyager database. Perhaps there is an error in the ISSN field in the local Voyager database. It is also possible that the title is simply not in the SFX KnowledgeBase.

One approach to resolving the "NotExist" ISSNs is to copy the ISSN from the output report and perform an ISSN search in the Voyager cataloging client. When the Voyager bib record is found, copy the title information and then perform a Title Search in SFX's **Search Objects** function. Be sure to include only the "main" title data (i.e., omit subtitles and statements of responsibility) in the input for the **Search Objects** function. Alternatively, if the list of "NotExist" titles is lengthy, administrators might consider using the Look-Up Tool as described in Section 5 of this document. If the response from SFX is "No results found," try shortening the input to make sure subtitle or other information is not included. If the search still returns a message of "No results found," it is likely that the journal title information is truly not present in the SFX KnowledgeBase. If the library can supply supporting documentation (e.g., an OCLC record) that the ISSN is correct for this journal title, the ISSN and supporting documentation can

be submitted to ExLibris for future addition to SFX's KnowledgeBase. The library may also decide to add local objects to the Knowledge Base.

If the title search returns a result from Search Objects, the library may want to confirm the ISSN information in another source (e.g., OCLC). If the library agrees that the ISSN returned by SFX is correct for this title, the Voyager bib record should be updated with the correct information. The correct ISSN can also be added to a new DataLoader file and uploaded to SFX along with any other corrected ISSN information gleaned by this follow-up review (i.e., repeat the steps in Section 3 with a new input file of ISSN data).

## Report status of "Added"

Entries with a value of "Added" represent titles that were added as Object Portfolios to the LOCAL\_CATALOG target, via DataLoader. When DataLoader is run in "report mode", the Object ID is listed in the output report as "<TBD>" (to be determined). This is not an error, since no data were meant to be added in "report mode." When DataLoader is run in production mode (i.e., the option for Report Mode is not checked/enabled), the actual internal SFX Object ID is included in the output report in place of the "<TBD>."

Another difference in the output report between test and production runs of DataLoader is the processing status assigned for each title. In report mode, all titles found in the SFX object database receive the status of "Added." In a production load, all unique titles found in the SFX object database will receive the status of Added, but duplicated ISSNs in the input file will receive the status of "Exists." When the same ISSN appears in the input file more than once, this is not an error in the output file.

Below is an example of a production run of DataLoader for uploading print title ISSN information (run on a subset of the input file shown previously). It is sorted by ISSN to show how duplicated ISSNs in the input file are treated in the load.

	A	B	C	D	E	F
1	Report	Added	0000-0019	Added portfolio with id=171700000000000002		
2	Report	Exists	0000-0019	A portfolio with that ISSN found		
3	Report	Added	0000-0027	Added portfolio with id=171700000000000003		
4	Report	Exists	0000-0027	A portfolio with that ISSN found		
5	Report	Exists	0000-0027	A portfolio with that ISSN found		
6	Report	Added	0000-0051	Added portfolio with id=171700000000000004		
7	Report	Added	0001-0235	Added portfolio with id=171700000000000005		
8	Report	Exists	0001-0235	A portfolio with that ISSN found		
9	Report	Added	0001-026X	Added portfolio with id=171700000000000006		
10	Report	Exists	0001-026X	A portfolio with that ISSN found		

Figure 35: Display of ISSNs that are duplicated in the input file

## Report Totals

Review the Report total included at the end of the output file. It should correspond with the number of records in the input file, although if the input file contains duplicated ISSNs, the number of records added by DataLoader will not match the total number of records in the input file. Sorting the output file by Column B and then comparing the different action statuses with the totals constitutes an adequate analysis of the output file.

Example of the report totals from a production run of DataLoader:

	A	B	C	D	E	F	G	H
36	Report	Added	0001-3617	Added portfolio with id=1717000000000022				
37	Report	Exists	0001-3617	A portfolio with that ISSN found				
38	Report	Added	0001-3625	Added portfolio with id=1717000000000023				
39	Report	Added	0001-396X	Added portfolio with id=1717000000000024				
40	Report	Exists	0001-396X	A portfolio with that ISSN found				
41	Report	Exists	0001-396X	A portfolio with that ISSN found				
42	Report	Exists	0001-396X	A portfolio with that ISSN found				
43	Report	Added	0001-4273	Added portfolio with id=1717000000000025				
44	Report	Added	0001-4664	Added portfolio with id=1717000000000026				
45	Report	Exists	0001-4664	A portfolio with that ISSN found				
46	Report	Exists	0001-4664	A portfolio with that ISSN found				
47	Report	Exists	0001-4664	A portfolio with that ISSN found				
48	Report	Exists	0001-4664	A portfolio with that ISSN found				
49	Report	Exists	0001-4664	A portfolio with that ISSN found				
50	Report	Added	0001-4761	Added portfolio with id=1717000000000027				
51	Report	Total	26	Added 26 portfolios				
52	Report	Total	0	Updated 0 portfolios				
53								

Figure 36: DataLoader report totals

Library staff might also want to view the number of “Available” object portfolios for the LOCAL\_CATALOG target service in the SFX KB Manager to verify that the number of added portfolios from the output file of the production run of DataLoader corresponds to the number of object portfolios available in the Knowledge Base:

List of Portfolios for LOCAL_CATALOG_EXLIBRIS_VOYAGER						
<a href="#">Add New Portfolio</a>		<a href="#">Activate All</a> <a href="#">Deactivate All</a> <a href="#">Delete</a> <a href="#">Activate</a> <a href="#">Deactivate</a>				
Find portfolio by		Title		Go		Showing page 1 of 24
		Available: 466 portfolios		Database: sfxncc		<a href="#">Back to Target</a>
#	Service	Object	Title	Threshold		
1	getHolding	0001-0782	Communications of the ACM	\$obj->parsedDate('>=',1982,...		
2	getHolding	0001-1185	AFL-CIO news	\$obj->parsedDate('>=',1982,...		
3	getHolding	0001-8392	Administrative science quarterly	\$obj->parsedDate('>=',2003,...		
4	getHolding	0001-8899	Advertising Age	\$obj->parsedDate('>=',1980,...		
5	getHolding	0001-8996	The Advocate	\$obj->timediff('<=',1y')		

Figure 37: Available object portfolios in OPAC target

## Section 5: Using the Look-Up Tool for Voyager database titles without ISSNs

Section 1, above, instructed libraries to remove from the Excel data input file any rows without an ISSN. Libraries do have the option to upload ISSN-less titles into SFX’s Look-Up Tool, in order to identify any ISSNs or Object IDs that might be present in the SFX KnowledgeBase.

The Look-up Tool is essentially a method for bulk searching against the SFX KnowledgeBase (i.e., the Search Objects option in the KBManager). Journal titles are used as the input, and if the ISSN is present in the SFX Objects database, the ISSN is returned in the output file. Similarly, if an Object ID is present in the Objects database, it will be returned in an output file. Libraries can use ISSN information to update their Voyager record(s) as well as their DataLoader input file in Excel, for subsequent use. For titles that truly have no ISSN, object IDs can be used to add object portfolios to the LOCAL\_CATALOG target.

## Create the input file

A suggested place to start with this task is the original Excel file with print title information from Voyager. It can be sorted by ISSN, so that all records without an ISSN are grouped together. Delete any records that contain an ISSN and save the file with a different file name. Be sure the filename does not contain any blank spaces.

Like DataLoader, the input file for the Look-Up Tool must be a tab-delimited text file (\*.txt). The journal titles are entered in Column A.

NOTE: If you create the file using Excel for Mac, be sure to save the file as Windows Formatted Text.

The Look-Up Tool searches the SFX Objects database, and the title information in that database is generally the journal title information found in the bib record's 245 \$a. This information should be edited prior to using Look-Up Tool:

1. Subtitle information such as data found after the colon should be removed from the input file (also delete the colon or other marks of punctuation representing the break between title and subtitle).
2. GMD data such as "[microform]" and statements of responsibility such as "/ published by the Society of ..." should be removed from titles in the input file.
3. Generic titles such as "Annual report" could retrieve thousands of records, and therefore are not good candidates for use with the Look-Up Tool. These generic titles should be investigated manually, outside of SFX's Look-Up Tool, and should be removed from the input file.

Below is an example input file, with the journal title information edited to remove undesired data:

	A	B	C	D	E	F	G	H	I
1	AAU news and amateur athlete.								
2	Accredited institutions of postsecondary education.								
3	Acta mathematica								
4	Advertising magazine.								
5	Advertising.								
6	Afro-American.								
7	After dark.								
8	AgExporter								
9	Agricultural prices								

Figure 38: Look-Up Tool input file



## Run Look-Up Tool

1. Once you have a tab-delimited text input file prepared, click the **Look-Up Tool** option found under **Additional KBTools** in the SFX Admin Center.



Figure 39: Look-Up Tool

2. In the **Specify input file name** field, click on the **Browse** button and then navigate to the place on the workstation to which the tab-delimited text file of journal titles was saved.
3. No changes should be needed to the default entries for the **Input file contains** (i.e., TITLE) and **Look up corresponding** (i.e., ISSN) drop-down menu options for this use of the Look-Up Tool.

A screenshot of the ExLibris SFX Look-Up Tool form. The page has a header with the 'ExLibris SFX' logo and links for 'OpenURL Generator' and 'Log Off'. Below the header, there's a navigation bar with 'Home', 'KBManager', and 'Additional KBTools'. Under 'Additional KBTools', there are links for 'Look-Up Tool', 'TargetMatcher', 'Threshold Tool', and 'Category Tool'. The main content area is titled 'Welcome to Look-Up Tool'. It contains three input fields: 'Specify input file name:' with a 'Browse...' button, 'Input file contains:' with a dropdown menu set to 'TITLE', and 'Look up corresponding:' with a dropdown menu set to 'ISSN'. A 'Submit' button is located at the bottom right.

Figure 40: Look-Up Tool form

4. When all required values have been set, click the **Submit** button to start the Look-up Tool. Depending on the size of the input file, it can take up to several minutes for the file to be processed.
5. After the file processing has completed, review the output files.



Figure 41: Look-Up Tool output files

## Review Look-Up Tool output reports

The output reports from running the Look-Up Tool can be viewed on-screen or downloaded to the workstation. The CARLI Office recommends libraries download the files locally, because once this browser window is closed, the library cannot retrieve the output files via the SFX Admin Center. (If the browser window is closed without the files having been downloaded, the library can contact the CARLI Office and the files can be retrieved manually and made available to library staff.)

To download each output file, click the **Download** link and follow your browser's prompts to Save the file to the workstation. These output reports are tab-delimited text files. For best viewing and sorting of the results, open the output files with Excel.

The screenshot shows a Microsoft Excel window titled 'Microsoft Excel - LookupTool\_test2[1].txt.ok.lookup.txt'. The spreadsheet has two columns, A and B. Column A contains various terms, and Column B contains their corresponding numerical identifiers. The data is as follows:

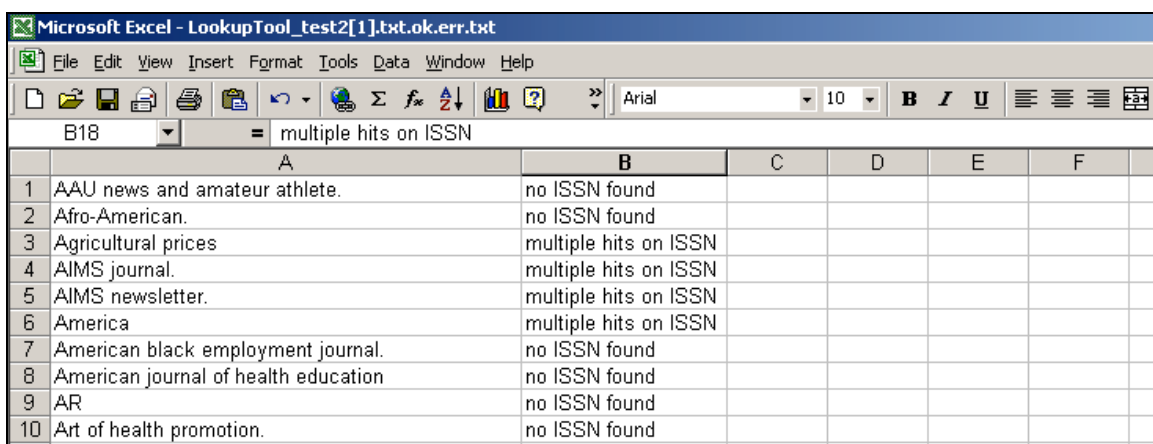
	A	B
1	AAU news and amateur athlete.	
2	Accredited institutions of postsecondary education.	0270-1715
3	Acta mathematica	0001-5962
4	Advertising magazine.	1017-8406
5	Advertising.	0141-8920
6	Afro-American.	
7	After dark.	0002-0702
8	AgExporter	1047-4781
9	Agricultural prices	0002-1601,0746-987X
10	AIMS journal.	0265-5004,1357-9657
11	AIMS newsletter.	0001-1622,0895-3155
12	Amateur athlete.	0002-6808
13	America	0002-7049,1041-0732,1047-3904,1527-5442
14	American black employment journal.	
15	American childhood.	0731-1559

Figure 42: Primary output file as viewed in Excel

Column A is the title from the input file, and Column B contains the ISSN data (if any ISSN was found) for each title. Some titles may have more than one ISSN returned, especially when the journal title is a common word.

For any titles for which the Look-Up Tool returns ISSN information, the library may want to (1) verify the ISSN information in a source such as OCLC, and, if correct, add the ISSN data to the appropriate bib record in the local Voyager database; and (2) resubmit the (correct for the bib record) ISSN in a new file that is uploaded using DataLoader, to activate the object(s) within the LOCAL\_CATALOG target. It is recommended (but not required) that the Voyager bib records be updated prior to the secondary run(s) of DataLoader. This will prevent the patron from being presented with a “Title Not Found” result from WebVoyage when the metadata sent via SFX include an ISSN but the record in the Local Catalog does not yet contain the matching ISSN. Alternatively, the LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER target parser may be modified to search by title OR ISSN.

The second output file (i.e., “**Report file**” in the Look-Up Tool results page) contains title and results information for any records for which a single ISSN was not returned from the Look-Up Tool.



	A	B	C	D	E	F
1	AAU news and amateur athlete.	no ISSN found				
2	Afro-American.	no ISSN found				
3	Agricultural prices	multiple hits on ISSN				
4	AIMS journal.	multiple hits on ISSN				
5	AIMS newsletter.	multiple hits on ISSN				
6	America	multiple hits on ISSN				
7	American black employment journal.	no ISSN found				
8	American journal of health education	no ISSN found				
9	AR	no ISSN found				
10	Art of health promotion.	no ISSN found				

Figure 43: Secondary output file as viewed in Excel

This file can be used to facilitate further searching in other databases. Additional use of the Look-Up Tool's reporting capabilities may return Object IDs in cases where no ISSN was found. For items with multiple ISSNs, use OCLC.

#### Create input file for titles with “no ISSN found”

1. Sort the secondary output file (shown in the figure above) by Column B.
2. Remove rows reporting statuses other than “no ISSN found.”
3. Save as a tab-delimited text file (\*.txt).

#### Run Look-Up Tool

1. Once you have a tab-delimited text input file prepared, click the **Look-Up Tool** option found under **Additional KBTools** in the SFX Admin Center.
2. In the **Specify input file name** field, click on the **Browse** button and then navigate to the place on the workstation to which the tab-delimited text file of journal titles was saved.

3. No change is needed to the default entry for **Input file contains** (i.e., TITLE), but Object ID will need to be selected in the **Look up corresponding** drop-down menu for this use of the Look-Up Tool.

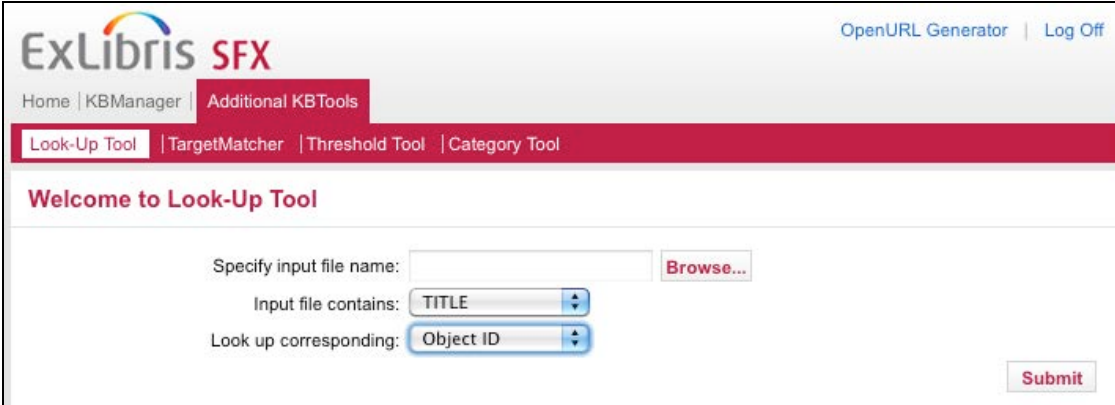
The screenshot shows the ExLibris SFX web interface. At the top, there's a header with the ExLibris SFX logo and navigation links: Home, KBManager, and Additional KBTools. Below this is a red navigation bar with links to Look-Up Tool, TargetMatcher, Threshold Tool, and Category Tool. The main content area is titled "Welcome to Look-Up Tool". It contains three input fields: "Specify input file name:" with a text box and a "Browse..." button; "Input file contains:" with a dropdown menu set to "TITLE"; and "Look up corresponding:" with a dropdown menu set to "Object ID". A "Submit" button is located at the bottom right of the form.

Figure 44: Using the Look-Up Tool to match titles to Object IDs

4. When all required values have been set, click the **Submit** button to start the Look-up Tool. Depending on the size of the input file, it can take up to several minutes for the file to be processed.
5. After the file processing is completed, review the output files.

### Review Look-Up Tool output reports

The output reports from the run of Look-Up Tool can be viewed on-screen or downloaded to the workstation. The CARLI Office recommends libraries download the files locally, because once this browser window is closed, the library cannot retrieve the output files via the SFX Admin Center. (If the browser window is closed without the files having been downloaded, the library can contact the CARLI Office and the files can be retrieved manually and made available to library staff.)

To download each output file, click the **Download** link and follow your browser's prompts to save the file to the workstation. These output reports are tab-delimited text files. For best viewing and sorting of the results, open the output files with Excel.

	A	B	C
1	AAU news and amateur athlete.		
2	Afro-American		
3	American black employment journal		
4	American journal of health education	1000000000238776	
5	AR	1000000000315688	
6	Art of health promotion		
7	Augustus	1000000000430154	
8	Australasian printer.		
9	Ballroom dance magazine.		
10	Bass world		
11	Between the species	1000000000441012	
12	Black history bulletin.	110975943589394,1000000000281452	
13	Bulletin of the College Art Association of America		
14	Camera & darkroom	110978977566947	
15	Cardinal news.		
16	Central Transcript		
17			

Figure 45: Primary output file as viewed in Excel

Column A is the title from the input file, and Column B contains the Object ID data (if any were found) for each title. Some titles may have more than one Object ID returned, especially when the journal title is a common word.

For any titles for which the Look-Up Tool returns Object ID information, the library may want to use DataLoader to activate the object(s) within the LOCAL\_CATALOG target.

The second output file (i.e., “**Report file**” in the Look-Up Tool results page) contains title and results information for any records for which a single Object ID was not returned from the Look-Up Tool.

	A	B	C
1	AAU news and amateur athlete.	no OBJECT found	
2	Afro-American	no OBJECT found	
3	American black employment journal	no OBJECT found	
4	Art of health promotion	no OBJECT found	
5	Australasian printer.	no OBJECT found	
6	Ballroom dance magazine.	no OBJECT found	
7	Bass world	no OBJECT found	
8	Black history bulletin.	multiple hits on OBJECT	
9	Bulletin of the College Art Association of America	no OBJECT found	
10	Cardinal news.	no OBJECT found	
11	Central Transcript	no OBJECT found	
12			

Figure 46: Secondary output file as viewed in Excel

This file can be used to facilitate further searching. Where the result was “no OBJECT found,” try pasting a truncated version (omitting anything that might be a subtitle) into the Title box on the Search Objects page. If the search still returns a message of “No results found,” it is likely that the journal title information is truly not present in the SFX object database. At this point it may be necessary to create new objects using the directions found in the CARLI document *Adding Local Objects to the KnowledgeBase and Adding New Portfolios to Targets*.

## **Section 6: Loading specific journal holdings via DataLoader**

The SFX DataLoader tool allows a library to upload specific journal title holdings information in addition to ISSNs and Object IDs. Volume, issue, year, and location information can be added as a Note and/or a Threshold.

The disadvantage to including specific holdings information in SFX is that the library is putting itself in the position of maintaining journal holdings information in two databases: the Local Catalog and the SFX Knowledge Base. The advantage is that you will provide specific holdings information to your users in the SFX menu rather than requiring them to click through to the OPAC.

### **The Note field**

If the specific holdings information is uploaded as a **Note**, the LOCAL\_CATALOG target will appear in the SFX menu when the OpenURL metadata match a LOCAL\_CATALOG object portfolio, whether the library owns a specific volume or not. The information in the note field may help the user decide whether to follow the link to the Local Catalog from the SFX menu or not.



Main Additional details	
Edit Object Portfolio - LOCAL_CATALOGUE_SIRSI_UNICORN - getHolding	
Object ID	954921332001
ISSN (PRINT)	0000-0019
Title	Publishers weekly
General description	
Availability	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Target Service Parser	SIRSI::WEBCAT
Parser(global)	<input type="text"/> <a href="#">+ Add local</a>
Parse Param (global)	<input type="text"/> <a href="#">+ Add local</a>
Use proxy	<input type="checkbox"/>
Threshold (global)	<input type="text"/> <a href="#">+ Add local</a>
<a href="#">Compose</a> <a href="#">Clear</a>	
Authentication note	
General note	Available from 2001, volume 241, issue 1.
Internal description	
<a href="#">Send to Ex Libris</a>	
<a href="#">Close Window</a>	<a href="#">Submit</a>

Figure 47: Local holdings information stored in the Note field

CARLI Consortium of Academic and Research Libraries in Illinois	
<b>Source:</b> The publishers weekly [0000-0019] yr:1990 vol:235 iss:3	
No Full text available No full text available for this item.	
<a href="#">Print may be available in Local OPAC</a> <a href="#">Go</a>	
Note: Available from 2001, volume 241, issue 1.	
<a href="#">Request document via Local Document Delivery System</a> <a href="#">Go</a>	
<a href="#">More Options</a> ▼	
© 2009 SFX by Ex Libris Inc.	

Figure 48: Local holdings information displayed in the Note field

## The Threshold field

If the specific holdings information is uploaded as a **Threshold**, SFX will test the OpenURL metadata against the threshold. If the metadata pass the threshold, the LOCAL\_CATALOG option will appear on the SFX menu. If the metadata do not pass the threshold, the LOCAL\_CATALOG option will not appear on the SFX menu.

For example, the specific holdings information uploaded as a threshold for *The Publisher's Weekly* indicates that the library holds volumes from the year 2001 to the present, starting with volume 249.

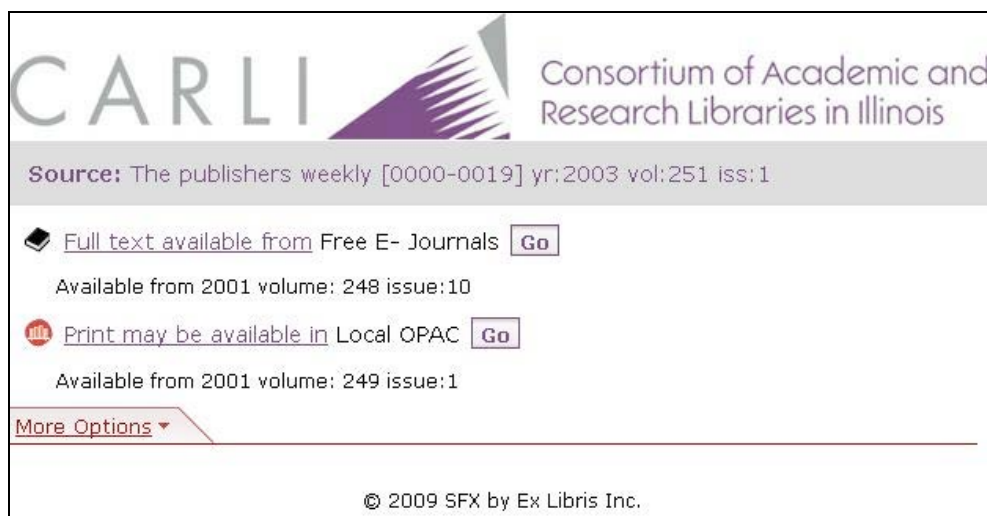
The screenshot shows a web form titled "Edit Object Portfolio - LOCAL\_CATALOGUE\_SIRSI\_UNICORN - getHolding". The form has a header with "Main" and "Additional details" tabs. The form fields are as follows:

- Object ID: 954921332001
- ISSN (PRINT): 0000-0019
- Title: Publishers weekly
- General description: (empty text area)
- Availability: ☒ Active ☐ Inactive
- Target Service Parser: SIRSI::WEBCAT
- Parser(global): (empty text field) + Add local
- Parse Param (global): (empty text field) + Add local
- Use proxy: ☐
- Threshold (global): \$obj->parsedDate('>=', '2001', '249', '1') + Add local
- Authentication note: (empty text area)
- General note: (empty text area)
- Internal description: (empty text area)

At the bottom of the form, there are buttons for "Compose", "Clear", "Send to Ex Libris", "Close Window", and "Submit".

Figure 49: Local holdings information stored as a threshold

In the example below, the user's metadata were for year 2003, volume 251, issue 1 for this title. This information passes when tested against the threshold outlined above and so the user was presented with the LOCAL\_CATALOG option on the SFX menu.



**Figure 50: Local holdings information displayed as a threshold**

Alternatively, in this example the user's metadata do not pass the threshold test, so the user is not presented with the LOCAL\_CATALOG option on the SFX menu. When the LOCAL\_CATALOG option is not available, CARLI libraries linked to the shared instance will see a link to the consortium's universal catalog, I-Share Classic, unless display logic rules dictate otherwise.



**Figure 51: OpenURL does not pass the threshold test**

### Using DataLoader to upload specific holdings information as a NOTE

If the library wishes to upload specific journal title holdings information to a Note field for an object, a tab-delimited text file is required. Column A must contain the ISSN, Column B must contain the word ACTIVE, and Column C must contain the desired holdings information. Because the holdings information is being added as a Note, no special formatting is required in Column C, but the Note data will be uploaded as found in the input file, so the library may wish to make sure the data are comprehensible to end users.

Although DataLoader will accept data in the Note field that are more than 255 characters long, the Note field length limit is 255 characters. DataLoader will not give any error messages about the note data being more than 255 characters, but note data are truncated after the 255<sup>th</sup> character within SFX.

An example input file appears below. The note data have been created for illustrative purposes and do not reflect actual library holdings.

	A	B	C	D	E	F	G	H
1	0000-0019	ACTIVE	Library has: v.1(1970)-date					
2	0000-0019	ACTIVE	Library has: v.1(1970)-date					
3	0000-0027	ACTIVE	Library has: v.2(1971)-date					
4	0000-0027	ACTIVE	Library has: v.2(1971)-date					
5	0000-0027	ACTIVE	Library has: v.2(1971)-date					
6	0000-0051	ACTIVE	Library has: v.3(1972)-date					
7	0001-0235	ACTIVE	Library has: v.4(1973)-date					
8	0001-0235	ACTIVE	Library has: v.4(1973)-date					
9	0001-026Y	ACTIVE	Library has: v.5(1974)-date					

Figure 52: Input file for uploading holdings to the Note field

Once the input file is in the correct format, the process to upload the information is very similar to the “standard” DataLoader process described in Section 3.

From the main SFX Admin Center menu, click the **DataLoader** link found under **KBTools**.

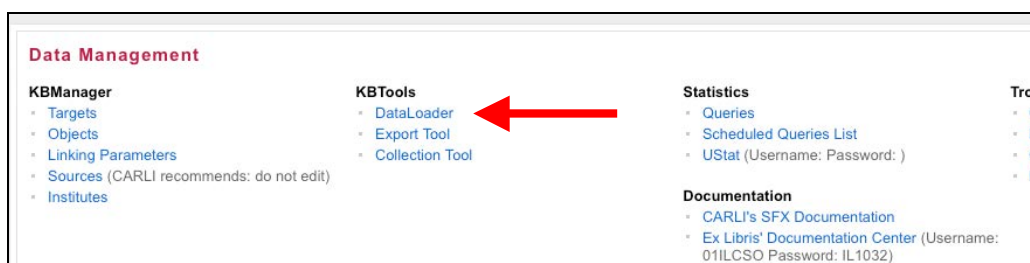


Figure 53: DataLoader

In the **Specify input file name** field, click on the **Browse** button and then navigate to the place on the workstation to which the tab-delimited file of ISSNs and Note data was saved.

In the **Select Target Service** drop-down menu, select **LOCAL\_CATALOGUE\_ENDEAVOR\_VOYAGER-getHolding**. If you do not see it listed, go back to the **Target** and confirm that **Object Lookup** is set to “Yes” for the **getHolding** service.

In the **Column 1 (Primary Key)** drop-down menu, select **ISSN**.

In the **Column 2** drop-down menu, select **ACTIVATION\_STATUS**.

In the **Column 3** drop-down menu, select **GENERAL\_NOTE**.

In the **Load Type** box, click **Add Portfolios** if this is the initial load of ISSN information along with the Note data. If this load is being done to add the specific holdings information into the Note field for ISSNs previously uploaded, click the **Update Portfolios** option in the Load Type box.

It is up to the library to decide whether to run DataLoader in report mode first. If this is the initial load of ISSN data and Notes are also included in the file, CARLI recommends that the first run be performed in report mode.

In this example, the objects already exist in the LOCAL\_CATALOG target from the ISSN-only load performed earlier. This load is being done to add Note data about library holdings to the existing object portfolios, so the Load type is **Update Portfolios**.

When all required values have been set, click the **Submit** button to start the data load.

ExLibris SFX

Home | KBManager | **KBTools** | Statistics | Troubleshooting

**DataLoader** | Export Tool | Collection Tool

Welcome to DataLoader

**Portfolios** | Update Objects | Add/Remove Objects

Specify input file/target service

Select Target + Service: LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER-getHolding

Specify input file name: 2issns2load2opacTargets.tx **Browse...**

Specify content of the input file

Select the type of each column in your input file:

Column 1 (Primary Key) Column 2 Column 3

ISSN ACTIVATION\_STATUS GENERAL\_NOTE

Column 4 Column 5 Column 6

Column 7 Column 8 Column 9

Specify load type

Load Type

☐ Add Portfolios

☒ Update Portfolios

☐ Remove Portfolios

☐ Activate targets(s) / target\_service(s)

☐ Report Mode - Do Not Update the Database

**Submit**

Figure 54: DataLoader form

Once the file processing has completed, this screen displays:



SFX ADMIN CENTER	
DataLoader Successful	
Mode:	Portfolios
Input file:	SFX_titlelist_test_rev3_withNOTES.txt
Summary:	Added 0 portfolios, updated 50 portfolios for: LOCAL_CATALOGUE_ENDEAVOR_VOYAGER-getHolding
An analysis of the data file can be found in: SFX_titlelist_test_rev3_withNOTES.txt.ok.err	
<a href="#">Download</a>	
A 'cleaned' copy of the data file can be found in: SFX_titlelist_test_rev3_withNOTES.txt.ok	
<a href="#">Download</a>	
A log of the dataloader run can be found in: dataloader.log	
<a href="#">Download</a>	

Figure 55: DataLoader output files

The output files are very similar to those for ISSN-only data loads. See Section 3 for more information about these files. One difference that should be noted is that when DataLoader is run with Load Type of **Update Portfolios** (as opposed to Add Portfolios), the status information in Column B of the output report will state “Updated” instead of “Added.” This is the expected status for runs of this type.

Also, if the Load Type is **Update Portfolios** but the object portfolio did not exist previous to the run of DataLoader, the status will be “NotExist.” No new object portfolios are added with a load type of **Update Portfolios**.

### Using DataLoader to upload specific holdings information as a THRESHOLD

If the library wishes to upload specific journal title holdings information to the threshold field for an object, a tab-delimited text file is required. Column A must contain the ISSN, Column B must contain the word ACTIVE, and Column C must contain the desired holdings information, formatted in PERL. As with other DataLoader processing, the file must be saved as a tab-delimited text file and the filename must not contain any blank spaces.

See Chapter 4 of the *SFX General User’s Guide*, “How to use Excel to create Local Thresholds,” for details on using Excel functionality to manipulate the input file to create local thresholds that can be uploaded with DataLoader. Note that the threshold information must be formatted in PERL in order for the thresholds to function properly.

An example input file appears below. The threshold data have been created for illustrative purposes and do not reflect actual journal title ownership dates in any library.



	A	B	C	D	E
1	0000-0019	ACTIVE	\$obj->parsedDate(">=",1993,26,1)		
2	0000-0027	ACTIVE	\$obj->parsedDate(">=",1994,1,1)		
3	0000-0051	ACTIVE	\$obj->parsedDate(">=",1995,10,1)		
4	0001-0235	ACTIVE	\$obj->parsedDate(">=",1996,undef,undef)		
5	0001-026X	ACTIVE	\$obj->parsedDate(">=",1990,1,1)		
6	0001-0278	ACTIVE	\$obj->parsedDate(">=",2000,1,1)		
7					
8					

Figure 56: Input file for loading holdings as thresholds

Once the input file is in the correct format, the process to upload the information is very similar to the “standard” DataLoader process described in Section 3.

From the main SFX Admin Center menu, click the **DataLoader** link found under **KBTools**.

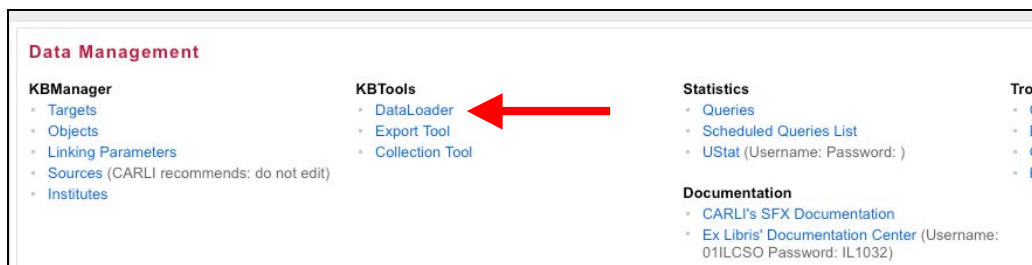


Figure 57: DataLoader

In the **Specify input file name** field, click on the **Browse** button and then navigate to the place on the workstation to which the tab-delimited file of ISSNs and threshold data was saved.

In the **Select Target Service** drop-down menu, select **LOCAL\_CATALOGUE\_ENDEAVOR\_VOYAGER-getHolding**. If you do not see it listed, go back to the **Target** and confirm that **Object Lookup** is set to “Yes” for the **getHolding** service.

In the **Column 1 (Primary Key)** drop-down menu, select **ISSN**.

In the **Column 2** drop-down menu, select **ACTIVATION\_STATUS**.

In the **Column 3** drop-down menu, select **THRESHOLD**.

In the **Load Type** box, click **Add Portfolios** if this is the initial load of ISSN information along with the holdings as threshold data. However, if the ISSN data were uploaded previously, and this load is being done to add the specific holdings information into the local threshold field, then in the Load Type box, click the **Update Portfolios** option.

It is the library’s decision whether to run DataLoader in report mode first. If this is the initial load of ISSN data that also includes thresholds, CARLI recommends that the first run be performed in report mode.

In this example, the objects already exist in the LOCAL\_CATALOG target from the ISSN-only load performed earlier. This load is being done to add threshold data about library holdings to the existing object portfolios, so the Load type is **Update Portfolios**.

ExLibris SFX

Home | KBManager | **KBTools** | Statistics | Troubleshooting

DataLoader | Export Tool | Collection Tool

Welcome to DataLoader

Portfolios | Update Objects | Add/Remove Objects

Specify input file/target service

Select Target + Service: LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER-getHolding

Specify input file name: 2issns2load2opacTargets.tx [Browse...](#)

Specify content of the input file

Select the type of each column in your input file:

Column 1 (Primary Key) Column 2 Column 3

ISSN ACTIVATION\_STATUS THRESHOLD

Column 4 Column 5 Column 6

Column 7 Column 8 Column 9

Specify load type

Load Type

☐ Add Portfolios

☒ Update Portfolios

☐ Remove Portfolios

☐ Activate targets(s) / target\_service(s)

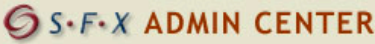
☐ Report Mode - Do Not Update the Database

[Submit](#)

Figure 58: DataLoader form

When all required values have been set, click the **Submit** button to start the data load.

Once the file processing has completed, this screen displays:

	
er > KBTools > <b>DataLoader</b>	
KBManager   Op	
<b>DataLoader Successful</b>	
<b>Mode:</b>	Portfolios
<b>Input file:</b>	SFX_titlelist_test_rev4_withTHRESHOLD.txt
<b>Summary:</b>	Added 0 portfolios, updated 6 portfolios for: LOCAL_CATALOGUE_ENDEAVOR_VOYAGER-getHolding
An analysis of the data file can be found in: SFX_titlelist_test_rev4_withTHRESHOLD.txt.ok.err	
A 'cleaned' copy of the data file can be found in: SFX_titlelist_test_rev4_withTHRESHOLD.txt.ok	
A log of the dataloader run can be found in: dataloader.log	

**Figure 59: DataLoader output files**

The output files are conceptually very similar to those for ISSN-only data loads. See Section 3 for more information about these files. One difference that should be noted is that when the DataLoader is run with Load Type of **Update Portfolios** (as opposed to Add Portfolios), the status information in Column B of the output report will state “Updated” instead of “Added.” This is the expected status for runs of this type.

Also, if the Load Type is **Update Portfolios** but the object portfolio did not exist previous to the run of DataLoader, the status will be “NotExist.” No new object portfolios are added with a load type of **Update Portfolios**.

Note that DataLoader does no checking and will load malformed data in the Threshold field (e.g., not formatted in PERL), and no error messages are returned in either output file. Objects with malformed threshold data will not function properly in SFX, so it is essential that library staff make sure the thresholds are properly formatted before uploading this information into the local SFX instance. The CARLI Office strongly suggests that a small number of objects with thresholds be loaded initially and then tested thoroughly before a full set of threshold data is added/updated with DataLoader.

## Section 7: Getting Help

Questions about this document should be directed to the CARLI Office at [support@carli.illinois.edu](mailto:support@carli.illinois.edu).

## Appendix A: Figures

**List of Linking Parameters for LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER-getHolding**

Available: 3 records Database: sfxst41

#	Institute	Parameter	Value	Description
1	DEFAULT	\$\$LOCAL_SERVER		
2	DEFAULT	\$\$USE_ISBN_OR		
3	DEFAULT	\$\$VERSION		

Figure 60: Window that opens after clicking on the "L/P" button

**Main Additional details**

**Edit Target Service - LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER - getHolding**

Service: getHolding

Public Name (global): Holdings in [+ Add local](#)

Activation status: ☒ Active ☐ Inactive

Site down: ☐ Site down date: 0000-00-00 00:00:00  
Site down reason:

Object Lookup (global): No [+ Add local](#)

Is free?: No

Parser (global): ENDEAVOR::VOYAGER [+ Add local](#)

Parse Param (global): url=\$\$LOCAL\_SERVER & use\_isbn\_or=\$\$USE\_ISBN\_OR & version=\$\$VERSION [+ Add local](#)

Figure 61: Object Look-up set to "No"

**Intro AZ Main AZ CitationLinker AZ Info Popup Availability Relation Types Service Public Names SFX Menu Main**

This groups hold translations of services and their groups. These translations only affect the A-Z List & Simplified SFX M

Message Text	Description	Message Code
Full text available from	Full text available from service.	getFullTxt
Full text available via	Full text available via service.	getSelectedFullTxt
Full text available via	Full text available via service.	getDOI
No Full text available	No Full text available service.	getMessageNoFullTxt
Holdings in	Default name for getHolding service.	getHolding

**Edit Message Text**

We may have in print. Please check

[Update](#) [Cancel](#)

Figure 62: Translations & Display Tool being used to update text in the SFX menu

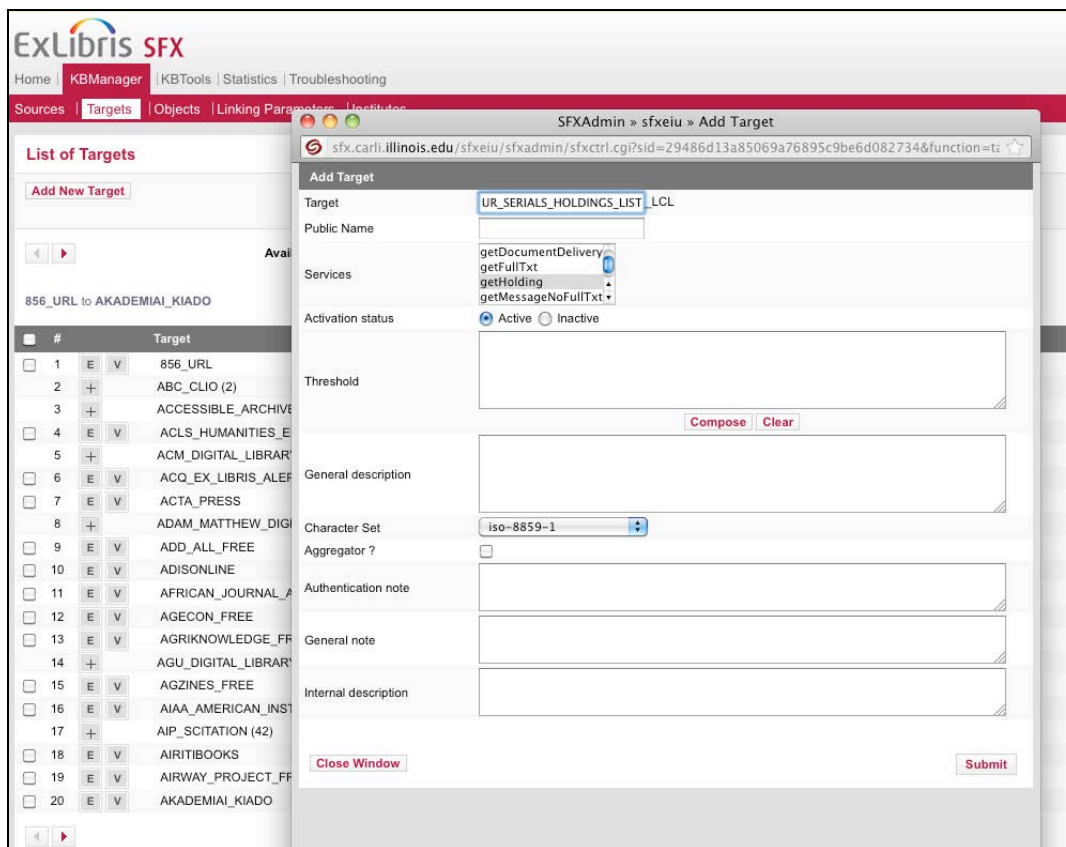


Figure 63: Creation of a new target and selection of service type

## Appendix B: Extract Print Journal Title Information from Voyager for SFX

Available online at: <http://www.carli.illinois.edu/mem-prod/I-Share/secure/sql/sql-serials.html#060616>

**Title:** Extract Print Journal Title Information from Voyager for SFX implementation

**What it does:** Finds all bibs with the MARC leader bib level value of "s" (for serials)

**This might be useful for:** A starting point for loading the library's print journal title information into their SFX instance

**Fields in the final report:** ISSN, TITLE, PUBLISHER, Publication Status, LOCATION\_NAME, 866 field data, 853 field data, 863 field data

**Version of Voyager:** tested with V6.1

**Author:** Casey Sutherland

**Author's Library:** CARLI

**Posted:** 9/28/2005

**Notes:** This query is, by design, broad in its scope. It is expected that some libraries will add additional criteria to this query (e.g., limit to specific locations). And unless the library's holdings information is very precise and consistent in its formatting, the actual holdings per title may not be included in your initial SFX implementation. Correctly formatted (for SFX) holdings information per title can be added to your SFX instance at a later date.

Your library may wish to run this query and export the results to an Excel file. The Excel file can then be manipulated as needed to create the input file that can be used to upload your print journal title info to your SFX instance.

### Main Query:

```
SELECT utf8to16([bib_text].[ISSN]) AS Issn, utf8to16([bib_text].[TITLE]) AS Title,
utf8to16([bib_text].[PUBLISHER]) AS Publisher,
Mid([BIB_TEXT.FIELD_008],7,1) AS [Publication Status], LOCATION.LOCATION_NAME,
GetFieldAll(getmfhdblob([mfhd_master].[mfhd_id]),"853") AS 853,
GetFieldAll(getmfhdblob([mfhd_master].[mfhd_id]),"863") AS 863
FROM ((BIB_MFHD INNER JOIN BIB_TEXT ON BIB_MFHD.BIB_ID = BIB_TEXT.BIB_ID)
INNER JOIN MFHD_MASTER ON BIB_MFHD.MFHD_ID = MFHD_MASTER.MFHD_ID)
INNER JOIN LOCATION ON MFHD_MASTER.LOCATION_ID = LOCATION.LOCATION_ID
WHERE (((Mid([bib_format],2,1))='s'));
```