Verde KnowledgeBase

Elsevier Script

Version 2.0

The bridge to knowledge

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1

Introduction

Over the course of the past several months, Ex Libris has been working with Elsevier to improve their representation in the SFX and Verde KnowledgeBases.

The Elsevier Science Direct Freedom Collection and Elsevier Science Direct Complete may have different thresholds for different SFX customers, depending on the way in which the package was sold to the customer.

To accommodate this variation in availability periods:

- The July LKB update removes all global holdings from e-constituents included in the Elsevier Science Direct Freedom Collection package.
- Local thresholds should be loaded using the e-constituent loader.

This document describes the procedure required to run the parallel fix in Verde.

We apologize for this inconvenience and thank you for your cooperation.

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Solution Description

The Elsevier Science Direct Freedom Collection Localization script, `elsevier_freedom.pl`, is located in the SFX `admin/kbtools` directory under each instance. It was released with the July 2009 revision update.

The script enables you to create a load file that contains one of the following:

- the previous global coverage. (The coverage information that existed in the Elsevier Science Direct Freedom Collection e-package before the July 2009 KB update will be loaded as local data from your SFX installation.)
- holdings and activation based on the Science Direct Electronic Holdings Reports
- holdings and activation based on the Elsevier Science Direct Complete Holdings Reports

The created load file is then uploaded to Verde in order to activate and localize the Elsevier Science Direct Freedom Collection and Elsevier Science Direct Complete packages.

Note:

- Existing local coverage information will be overwritten during the loading of new coverage data.

- The three options described above create files in the Verde loading format. Verde customers must not load local thresholds directly into SFX. Rather, they should create the load files in SFX and use these as a source for uploading to Verde. These changes will then be carried over to SFX as part of the ongoing synchronization between the two systems.

Running the Script

Run the script to create a Verde load file.

To run the script:

1. Type `da`.
2. Type `./kbtools/elsevier_freedom.pl`.

The following menu will display, allowing you to choose one of three main options:

```
***Elsevier Threshold Tool***

1) Load Previous Thresholds - this will load the Elsevier Freedom Collection
Thresholds from before the July 2009 Update

2) Load Activations based on Elsevier Electronic Holdings Reports

3) Load Elsevier Complete Activations based on Elsevier Electronic Holdings
Reports

Choose number or [q] to exit: [1]
```

The following sections describe these three options.

Loading Previous Thresholds

If you select **1**, you will be presented with the following options:

```
***Elsevier Threshold Tool***
Would you like to

1) SFX-only Customers: Load the thresholds that existed before the July 2009
update?

Choosing this option will load the global thresholds that existed for this target
as local thresholds. In case you already have local thresholds, they will not be
overwritten. A report will be created showing the thresholds.

2) Verde Customers: Do you want to create a Verde load file?


Choose [1/2/q]: 1
```

Select option **2**. Two Verde loading files are created in the scratch directory.

- The first file includes e-constituents that currently have no local coverage information. New coverage information for these e-constituents is included in the file.
- The second file includes e-constituents that already have local coverage information. Updated coverage information for these e-constituents is included in the file.

Example output:

```
e-Constituent loadfile for items with no local coverage is
/exlibris/sfx_ver/sfx_version_3/ta_3/dbs/scratch
/Verde_Loadfile_Verde_elsevier_sd_freedom_20090701_thresholds.txt

e-Constituent loadfile for items with local coverage is
/exlibris/sfx_ver/sfx_version_3/ta_3/dbs/scratch/Verde_Loadfile_Verde_elsevier_sd_
freedom_20090701_nothresholds.txt
```

The next step is to upload the file to Verde. For details, see Uploading the Output Files to Verde on page 13.

Load Holdings and Activation Based on Elsevier Electronic Holdings Reports

This option creates a Verde load file from the CSV format of the Elsevier Holdings Reports, downloaded from the Elsevier administrative interface.

Retrieving the Elsevier Science Direct Electronic Holdings Reports

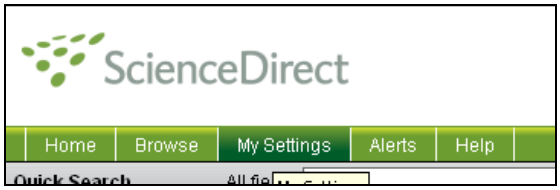
To retrieve the Elsevier Science Direct Electronic Holdings Reports:

1 Download the reports file in the comma-separated value format.

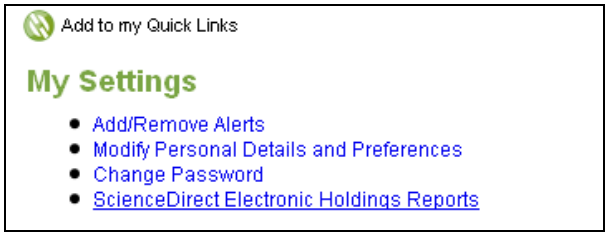
a Access the Science Direct site at: http://www.sciencedirect.com

b Log on as an administrator user.

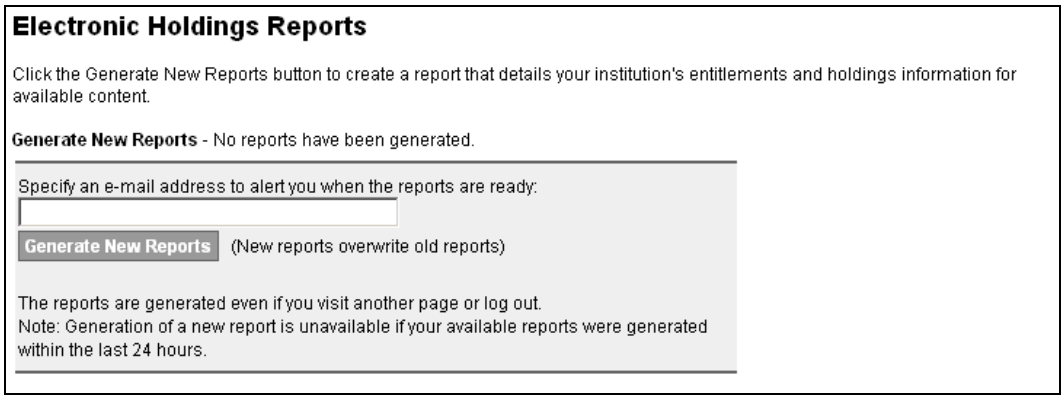
c Select the **My Settings** menu in the top left corner of the page.



d Under **My Settings**, select **Science Direct Electronic Holdings Reports** to generate the reports.



The following menu displays:



e Enter your e-mail address and click the **Generate New Reports** button to start the report generation process.

Note: This button is inactive if reports were generated in the last 24 hours. If reports were generated in the last 24 hours, you can use these reports.

When the reports are generated, the following screen displays:

f Under **Comma Separated Value**, click **Download File**. The downloaded file should be in the following format:

This report lists ScienceDirect Standard Holdings information for				
Account: SFX Test (C000051510)				
as of 14 June 2009				
Entitlement Status	Publicatior	Publication Name	ISSN	Publis
Non-Subscribed	Journal	Academic Pediatrics	1876-2859	Elsev
Non-Subscribed	Journal	Academic Radiology	1076-6332	Elsev
Subscribed	Journal	ACC Current Journal Review	1062-1458	Elsev
Subscribed	Journal	Accident Analysis & Prevention	0001-4575	Perga
Subscribed	Journal	Accident and Emergency Nursing	0965-2302	Churc

2 Copy the file to your SFX instance home directory, which is located in the following path on your server:

`/exlibris/sfx_ver/sfx_version_3/<instance>/home/`

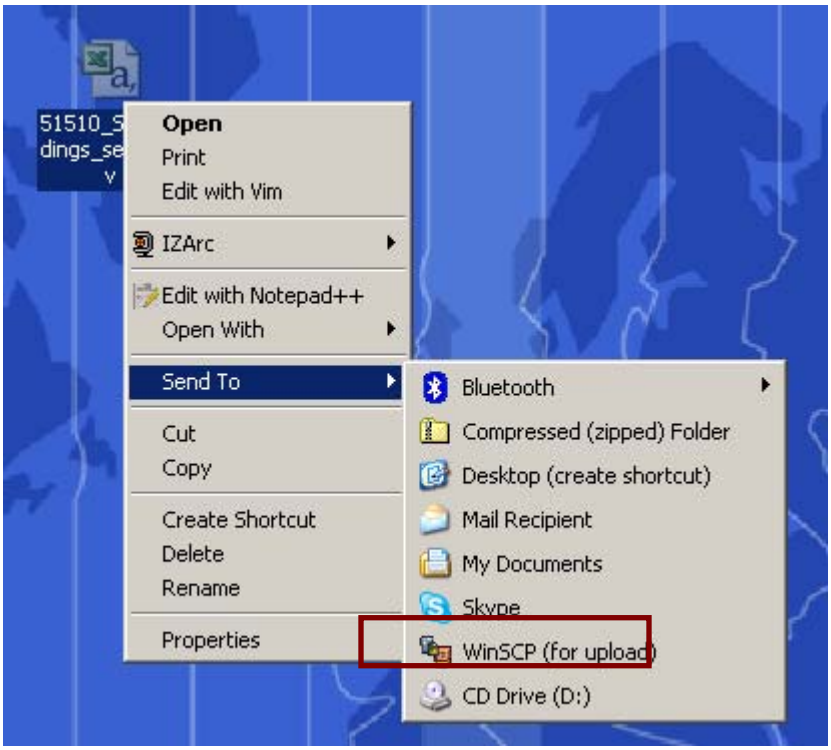
For example: `/exlibris/sfx_ver/sfx_version_3/sfxlcl3/home/`

Note: This can be done using any application you use to connect to your SFX server, such as Putty or SSH Client.

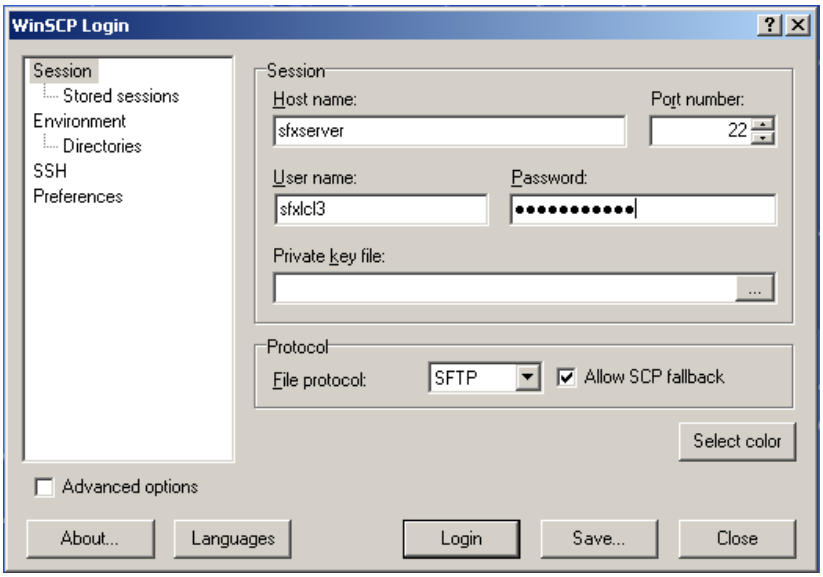
---

3 Copy the file to the SFX server.

For example, if you are using WinSCP (More information at http://winscp.net), right-click the holdings report, select **Send To**, and then in the sub-menu, select **WinSCP (for upload)**.



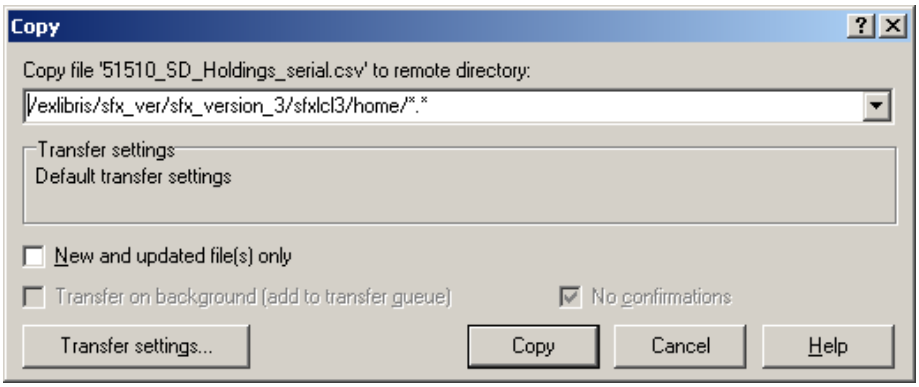
The following menu appears:



Enter your server logon details, including the server name or IP, the user name, and password, and click **Login**.

Once a connection has been established, you will be prompted for the location to which the file should be uploaded. By default, WinSCP places the file in the home directory.

Click **Copy** to start the file transfer.



Once the file has been transferred, the following dialog box displays:

4 Confirm the location of the file and change the file's permissions.

a To confirm that the file was indeed transferred, log on to your SFX instance and run the following commands:

```
cd ~
ls –lrt *.csv
```

You should see a row such as the following:

```
-rw-rw----  1 sfxlcl3 sfx 813831 Jun 14 10:23 51510_SD_Holdings_serial.csv
```

b Change permissions by typing `chmod r+w filename`. For example:

```
chmod g+w 51510_SD_Holdings_serial.csv
```

Loading Holdings Reports Using the Localization Script

Once you have retrieved the Elsevier Holdings Reports file, you can load the file using the localization script, `elsevier_freedom.pl`.

To load the file using the localization script:

1 Type `da`.

2 Type `./kbtools/elsevier_freedom.pl`.

The following menu appears, enabling you to choose one of several options:

```
***Elsevier Threshold Tool***

1) Load Previous Thresholds - this will load the Elsevier Freedom
   Collection Thresholds from before the July 2009 Update
2) Load Activations based on Elsevier Electronic Holdings Reports

3) Load Elsevier Complete Activations based on Elsevier Electronic
Holdings Reports

Choose number or [q] to exit: [1]
```

3 Select option **2** or **3**.

- Select option 2 if you want to load local activations and local thresholds to the Elsevier Freedom Collection target.
- Select option 3 if you want to load activations and local thresholds to the Elsevier Science Direct Complete target.

The following text appears, prompting you to enter the location of the file you downloaded.

```
***Elsevier Threshold Tool***
2. Loading Activation and Thresholds from Elsevier Electronic Holdings Reports

Enter the path to the directory where the information file is located:
[/exlibris/sfx_ver/sfx_version_3/ta_3/home]
```

```
Enter the name of the information file:Out_51510_SD_Holdings_serial.csv
```

4 If you downloaded the file to the home directory, press **Enter**. If the file is located in another directory, enter the path to this directory.

5 Enter the name of the Elsevier Holdings Reports file.

```
Enter the path to the directory where the information file is located:
[/exlibris/sfx_ver/sfx_version_3/sfxlc13/home]
Enter the name of the information file:
```

The following output displays:

```
Enter the name of the information
file:Out_51510_SD_Holdings_serial_Our_load_file.csv
The full path to the file is: /exlibris/sfx_ver/sfx_version_3/sfxlc13/home/
Out_51510_SD_Holdings_serial_Our_load_file.csv
Prepare the file to load to Verde [y/N]
```

6 Review the full path of the file to confirm that it is correct. Note that if there is a problem accessing the file, you will be prompted.

Two files are created:

- The first file includes e-constituents that currently have no local coverage information. New coverage information for these e-constituents is included in the file.
- The second file includes e-constituents that already have local coverage information. Updated coverage information for these e-constituents is included in the file.

```
Prepare the file to load to Verde [y/N] y
Creating Verde load file...
Total Lines                          3265
Not Subscribed                       1615
Not in Freedom collection              30
Valid Input - to be loaded           1590
Rejected ISSNs                          3
Empty Lines                            27
e-Constituent loadfile for items with no local coverage is
/exlibris/sfx_ver/sfx_version_3/ta_3/dbs/scratch
/Verde_Loadfile_Verde_elsevier_sd_freedom_20090701_thresholds.txt

e-Constituent loadfile for items with local coverage is
/exlibris/sfx_ver/sfx_version_3/ta_3/dbs/scratch/Verde_Loadfile_Verde_elsevier_sd_
freedom_20090701_nothresholds.txt
```

The output includes the following:

- Statistics
  - **Total Lines** – the count of all lines in the input file
  - **Not Subscribed** – the number of lines containing items to which you do not subscribe

- **Not in Freedom collection** – the number of lines for items not in the KB Freedom Collection target/e-package
- **Valid Input – to be loaded** – the number of lines that will be used for loading into Verde
- **Rejected ISSNs** – the number of lines containing invalid data
- **Empty Lines** – the number of empty lines in the incoming file

- The full path to the Verde load file in the home directory

The next step is to upload the files to Verde, as described in the following section.

Uploading the Output Files to Verde

The final step in the process is to upload the created files to Verde.

There are two types of files:

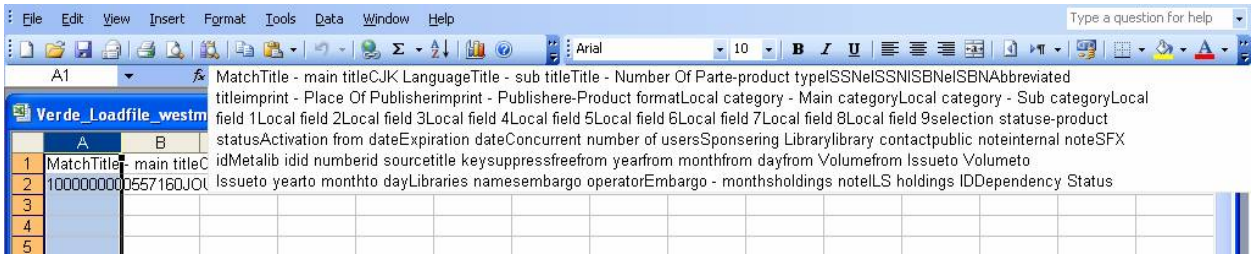
- a file that includes e-constituents that currently have no local coverage. Uploading this file will not overwrite local coverage data.
- a file that includes e-constituents that have been updated locally

Note: Since existing local coverage information is overwritten during the loading of new coverage data, it is recommended that you review coverage information for e-constituents that have updated locally before uploading this type of file.

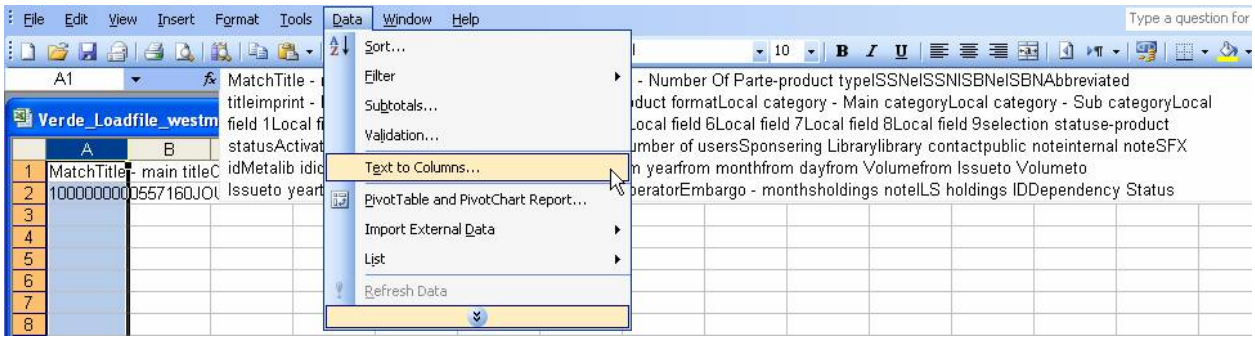
To upload an output file to Verde:

1 Download the file to your PC.

a Open the file and select the first column.

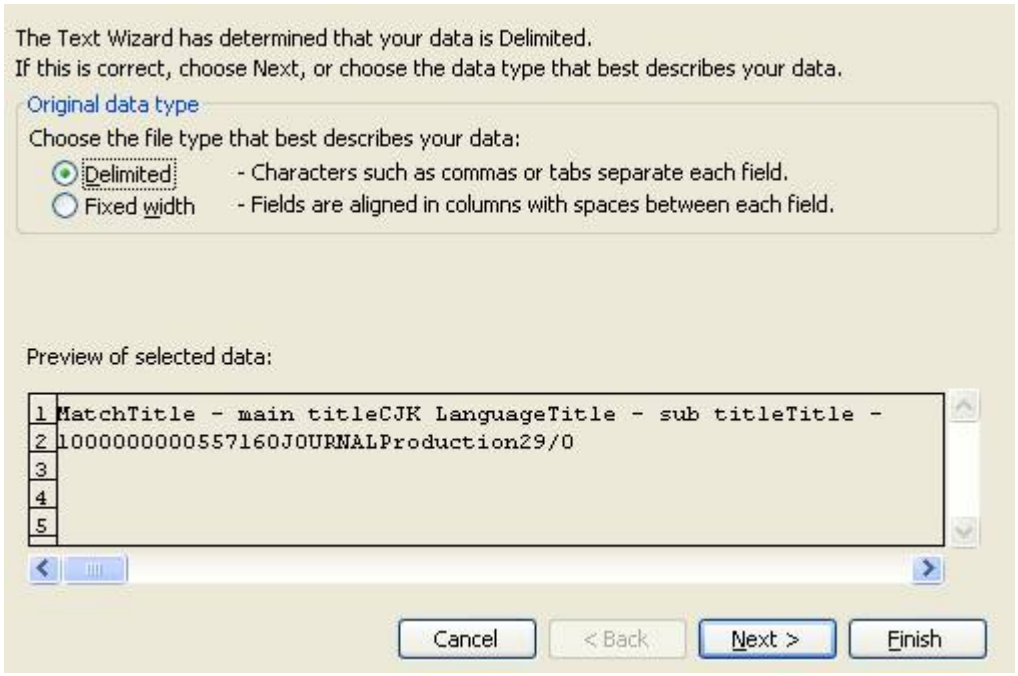


b From the **Data** menu, select **Text to Columns**.

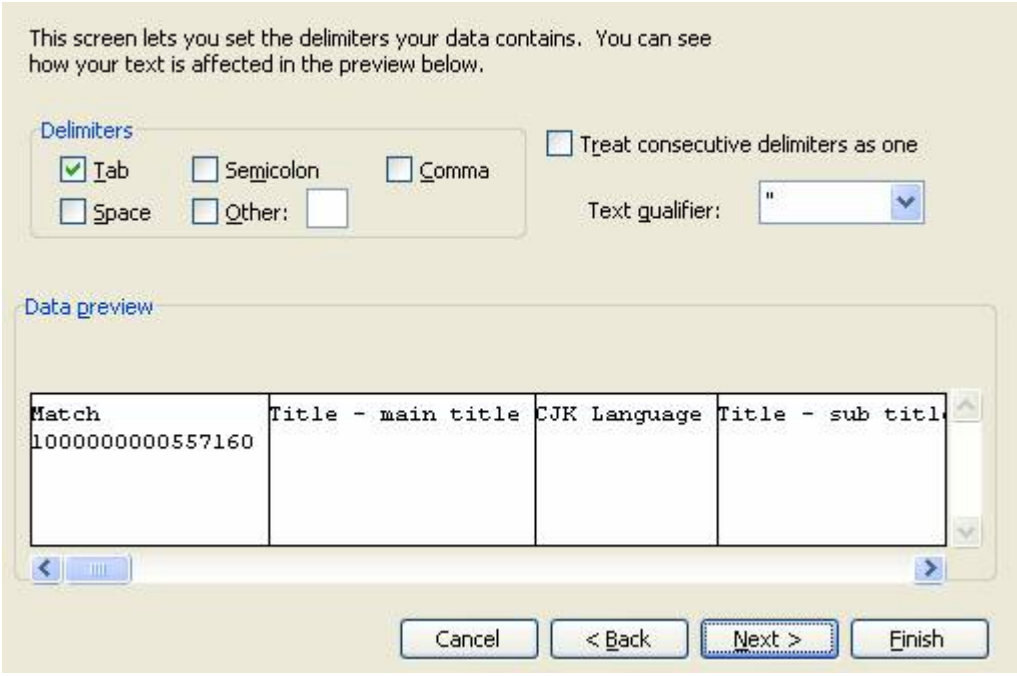


The Text Wizard opens.

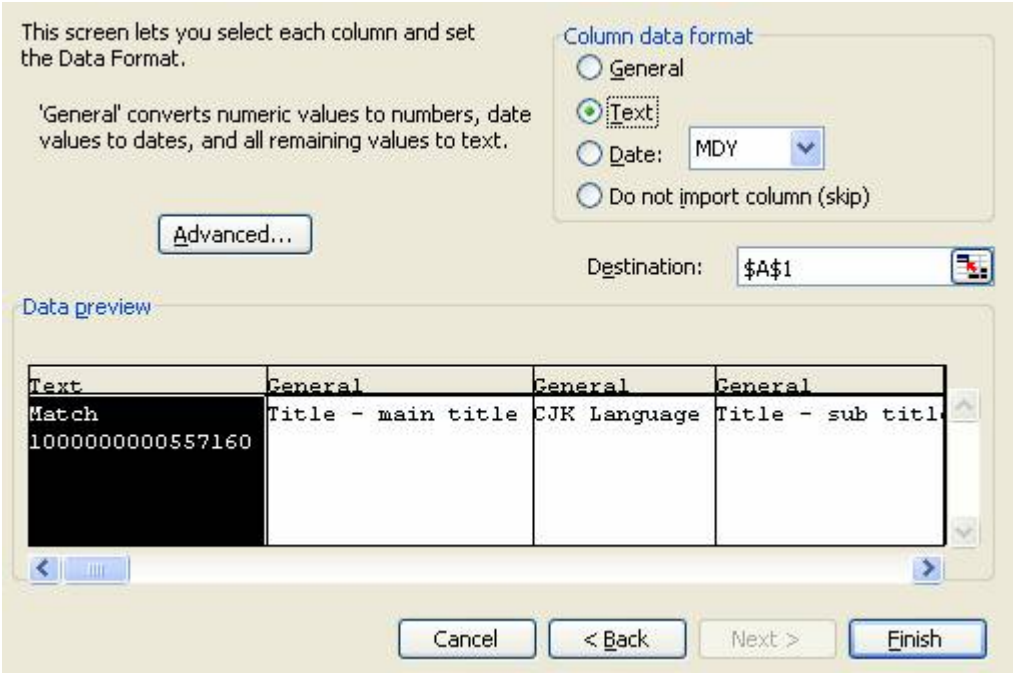
c Select the **Delimited** file type and click **Next**.



d Select the **Tab** delimiter and click Next.



e Select the **Text** column data format and click **Finish**.



f Save the file to your PC. The file can now be used by the e-constituent loader.

2 Log on to Verde, open the KB Tools module, and select the e-constituent loader.

3 Select the parameters for loading:

a Clear the **Update database** check box.

b In the **Select package** list, select **Elsevier SD Freedom Collection** or **Elsevier Science Direct Complete**.

c Browse to select the input file, or insert the input file location.

d Click **Submit**.

4 Check the loader output:

a Open the summary and verify that there are 0 rejected and 0 new e-constituents.

b If there are no rejections, upload the file again, ensuring that the **Update database** check box is selected.

If there are rejections, check the **Cause** column for an explanation of the rejections.

Possible errors:

The loading of e-constituent may be rejected due to a discrepancy between activation statuses and/or dates of the e-constituents and the e-package.

The following are possible errors:

- The e-constituent is active and the e-package is inactive.
- The activation dates of the e-constituent are not within the same range as the activation dates of its related e-package, such as in the following cases:
  - The activation date of the e-constituent is before the activation date of the e-package.
  - The expiration date of the e-constituent is after the expiration date of the e-package.

For more information about the e-constituent loader, see the e-constituent loader section in the *Verde Staff User's Guide*.