To exert more control over the SFX Menu OPAC Target and to provide the print holdings via the A-Z List, a library may choose to load print holdings as Object Portfolios within the OPAC Target service.

**Loading print holdings is optional and not required for OPAC Target functionality.**

Before making the decision to load (and therefore, **maintain**) print holding information in the SFX KnowledgeBase, the library should first consider using the Z39.50 plugin (or the Aleph X-server plugin for libraries using the Aleph integrated library system), as this may provide a satisfying and workable alternative. The plugins are documented in the *SFX Advanced User Guide > Plug In Feature section*.

**1. Preparing Print Journal Information for Loading**

1.1 **Obtain the Data**

* + 1. The library extracts a print journal holdings file from their catalog.
    2. The load file must be tab-delimited text.
    3. These data elements are required: ISSN, title, and the summary holdings or dates of available print coverage held by the library in from/to columns. Note that SFX uses volume/issue, not month/day, so don’t include coverage in month/day format.

Note: There can be multiple to-from series for any journal and these should all be put in separate columns.

Dedup the file. There can only be one line per ISSN/title. If there are multiple lines in the file, combine their coverage.

1.2 **Missing ISSNs?**

The ISSN plays a key role in SFX processes, so the library should confirm that journals without ISSNs – non-ISSN Objects – legitimately do not have an assigned ISSN. Non-ISSN Objects are also listed in the SFX KnowledgeBase.

1.2.1 Find ISSNs for all ISSN Objects. Search the SFX KnowledgeBase Object Table (*SFX General User Guide > Data Management > KB Manager > Objects> Searching for Objects*), use the Look-up Tool to try to batch-match titles and ISSNs (*SFX General User Guide > Additional KBTools > Look-Up Tool*), or use an independent research tool.

1.2.2 Use the Look-up Tool to find SFX Object IDs for all non-ISSN Objects. The SFX Object ID serves an identifier or primary key in lieu of the ISSN.

1.2.3 If there are non-ISSN Objects, divide the journal file into two – one listing ISSN Objects and one listing the remaining non-ISSN Objects.

1.3 **Handle Holdings Information**

Summary holdings can be loaded as Local Thresholds and/or as Notes.

1.3.1 Summary Holdings as Local Thresholds

Summary holdings loaded as Local Thresholds will allow the SFX Menu to display the OPAC Target Service as appropriate. For example, if the query is for an article from 2000 and the Local Threshold is 2002 to present, the OPAC Target Service will not appear in the SFX Menu. If the query is for an article from 2003 with the same Local Threshold, the OPAC Target Service WILL appear in the SFX Menu.

To load summary holdings as Local Thresholds, the threshold must be formatted in the correct syntax (*SFX General User Guide > Data Management > KBManager > Thresholds > Threshold Types > Parsed Date*). If the coverage dates in the file are in separate columns, as described above, threshold format can be generated using the tips in the *SFX General User Guide > KB Tools > DataLoader > Using Excel to Create Local Thresholds*. For instructions on how to combine multiple date ranges, see [KCS Q&A Article: How Can Multiple Date Ranges be Included in an SFX Threshold? (#23780)](https://exlibrisgroup.my.salesforce.com/articles/Q_A/How-Can-Multiple-Date-Ranges-be-Included-in-an-SFX-Threshold).

The Threshold Tool can be used to check the syntax of these local thresholds. See *SFX General User Guide > Setup and Administration > Additional KBTools > Threshold Tool section*.

This is a sample of the spreadsheet cells required to load with Threshold only:

|  |  |  |
| --- | --- | --- |
| 0022-0671 | ACTIVE | $obj->parsedDate('>=','1948',undef,undef) && $obj->parsedDate('<=','1952',undef,undef) |

1.3.2 Summary Holdings as Notes

The Note field is a text field which displays alongside the SFX Menu OPAC link. No special formatting is required. The summary holding statements only need to be readable by end-users. In this case, the OPAC Target Service will appear on the SFX Menu for all journals in the print holdings and the user will be required to examine the Notes field contents to discover if the library owns a specific issue or volume.

This is a sample of the spreadsheet cells required to load with notes only:

|  |  |  |
| --- | --- | --- |
| 0022-0671 | ACTIVE | 1948 - 1952 (Fiche); Online access restricted to patrons |

1.3.3 No Summary Holdings or Threshold

If no summary holding information or Threshold is loaded, the OPAC Target Service will always appear on the SFX Menu for the appropriate journals. The user will have to click on to the OPAC link and examine the bibliographic record to discover if the library owns a specific issue or volume.

This is a sample of the spreadsheet cells required to load without Threshold or notes:

|  |  |
| --- | --- |
| 0022-0671 | ACTIVE |

1.3.4 Both Summary Holdings and Threshold

Follow the instructions in section 1.3.1 to create the holdings Thresholds in SFX format. Also include a note field containing desired holdings text. This format combines the best features of both locations:

* Holdings loaded as Local Thresholds allows the SFX Menu to display the OPAC Target Service when appropriate (when print coverage exists)
* Supplemental information can be provided in the SFX Menu instead of requiring users to click through to the OPAC. For example, “1950-1960 are available as microfilm”

This is a sample of the spreadsheet cells required to load with both Threshold and notes:

|  |  |  |  |
| --- | --- | --- | --- |
| 0022-0671 | ACTIVE | $obj->parsedDate('>=','1948',undef,undef) && $obj->parsedDate('<=','1952',undef,undef) | 1948 - 1952 (Fiche); Online access restricted to patrons |

**2. Preparing the OPAC Target**

2.1 **Activate Target and Target Service**

2.1.1 If the OPAC Target and Target service were not previously activated, activate them now. OPAC Targets that are part of the global KnowledgeBase always begin with the phrase LOCAL\_CATALOGUE. Filtering the Targets table with that phrase will list all the OPAC Targets.

2.1.2 Activate the Target that corresponds to the library’s OPAC.

2.1.3 Click on “S” to drill down to the Target Service level and activate the associated getHolding service.

2.1.4 Input any required L/P (Linking Parameter) values. Consult the *Target Configuration Guide* for information regarding required L/P values.

2.2 **Change Default Object Lookup Setting**

SFX Admin > {OPAC Target} > getHolding Target Service level > click Add local > select Y

By default, OPAC Target Services do not have Object Portfolios (Object Lookup = No). In order to add Object Portfolios (print holdings) in the OPAC Target, the Target Service Object Lookup setting must be set to Yes.

**3. Load Print Journal Information via Dataloader**

The DataLoader is documented in *SFX General User Guide > KB Tools > DataLoader*.

3.1 **Prepare the File(s) for the DataLoader**

3.1.1 Save a copy of the ISSN Object file that was prepared in section 1. DataLoader can load one type of identifier per load (for example, only ISSNs or only Object IDs).

3.1.2 Edit the file to contain only the following columns and no header/label row at the top:

a. unique identifier (ISSNs or Object IDs) in the left-most column (the order of the other columns does not matter)

b. ACTIVE (all caps) for each row

c. optional: summary holdings in Threshold format

d. optional: summary holdings note field

3.1.3 Save this file as tab-delimited text.

3.1.4 Save a copy of the non-ISSN Object file that was prepared in section 1 and repeat 3.1.2 and 3.1.3 for this file.

3.2 **Set and Run the DataLoader**

3.2.1 From the KBManager > DataLoader interface, select the appropriate OPAC Target + Service, e.g., *LOCAL\_CATALOGUE\_SIRSI\_UNICORN – getHolding*.

3.2.2 Browse for a file saved in the previous step to specify the input file name.

3.2.3 Specify content of the input file, for example:

\* Column 1 = Primary Key, for example, the ISSN or OBJECT\_ID (this is always in the first column)

\* Column 2 = ACTIVATION\_STATUS (must be set to ACTIVE)

\* Column 3 = THRESHOLD (holdings can be added as a correctly formatted Threshold statement)

\* Column 4 = GENERAL\_NOTE (a summary holdings statement can be added as a note)

3.2.4 Optional: If a test run is desired, select the load type "Add Portfolios" checkbox and the “Report Mode” checkbox and Submit. In report mode, no database additions or changes are made. If this mode is selected, redo steps 3.2.1 through 3.2.3 before step 3.2.5.

3.2.5 To update the database, select the load type "Add Portfolios" checkbox and Submit.

3.3 **Review DataLoader Reports**

It is common that some Object Portfolios cannot be successfully added on the first attempt, so it is important to check the first report in the list of files that results from the process. This tab-delimited, text file shows which Object Portfolios could not be created. It can be opened as a spreadsheet.

3.3.1 If an ISSN is not in SFX, this type of message will be in the file:

*0088-6504 No object with that ISSN found*

These Object Portfolios were not created because their associated Objects currently do not exist in the SFX KnowledgeBase. These ISSNs and related metadata will need to be added as new Objects AND Portfolios.

3.3.2 If the file was not completely deduped, this type of message will be in the file indicating that the file included a duplicate ISSN:

*0274-9483 A portfolio with that ISSN found*

These lines should be checked since the thresholds may need to be combined.

3.3.3 For ISSN numbers that do not load, check that the ISSN number is correct. If a correct ISSN that is present in the KnowledgeBase, it can be loaded via the DataLoader or manually.

3.3.4 All ISSN and non-ISSN Objects that do not exist in the KnowledgeBase can be created via KBManager > Objects > Add Object. Once the Object is created, create their Object Portfolios in the OPAC Target. See *SFX General User Guide > KBManager > Objects > Adding an Object section*.

It is recommended to submit the added Object IDs and ISSNs to Ex Libris for inclusion in an SFX KnowledgeBase update.

**4. Turn on Holdings in the AZ List**

By default, the AZ List does not include journals which only have the getHolding Target Service, that is, no full text. Therefore, by default, print-only journal titles will not be included in the AZ List.

Change this by checking the Configuration > AZ eJournal List > CONTENT Section > Services to filter by > getHolding box.

**5. Run RSI and Index Process**

Complete the load and activation by running the RSI/reindex process from the server.

**6. Updating Print Holdings**

Though print holdings are not dynamic as electronic journal holdings, a plan should be made for updating this information. Monthly, quarterly, or even semiannual updates may be sufficient.

There are a number of possible workflows for updating local print holdings information in the SFX KnowledgeBase. If major changes are required, the simplest might be to delete all of the Object Portfolios in the OPAC Target and reload them. Consult section 7 of this document for how to delete all of the OPAC Target’s Object Portfolios, then repeat sections 1 through 3 above to reload them with fresh data.

**7. Deleting or Deactivating OPAC Target Object Portfolios**

7.1 **Remove Object Portfolios (and Reload)**

7.1.1 Run an export of the OPAC Target Service Object Portfolios to obtain a list of their ISSNs and/or Object IDs. This is done via SFX Admin > KBTools > Export Tool > Basic Export Queries > Export ACTIVE object\_portfolios > select the relevant Target (e.g., LOCAL\_CATALOG\_EXLIBRIS\_VOYAGER) > Submit. Download the result and open it in a spreadsheet.

7.1.2 In a spreadsheet, the useful fields can be extracted from the tab-delimited text export file and saved in 2 versions: one version for removing portfolios and one version for reloading the content.

The useful field(s) for

* Removing portfolios is OBJECT\_ID
* Reloading are ISSN or OBJECT\_ID (as appropriate), AVAILABILITY, THRESHOLD\_ACTIVE, and/or NOTE.

7.1.3 In the DataLoader, select the appropriate OPAC Target + Service, indicate the contents of the removal file (Object ID in the first and only column). For load type, select the Remove Portfolios checkbox. If a test run is desired, also check Report Mode.

7.1.4 Update the reload file for reloading content using the instructions in sections 1 through 3.

7.2 **Return to default OPAC Target functionality**

The easiest way to achieve this is to set the OPAC Target Service’s Object Lookup setting from Yes back to No. With this method, any loaded Object Portfolios still exist underneath the OPAC Target Service, but are functionally hidden.