

ExLibris

SFX

Release Notes

20163700

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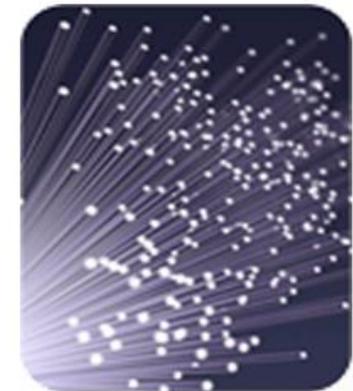
15 targets added

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Added new filters to the target list on SFXAdmin > KBManager to enable result filtering

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Targets Name Change:

BOOKS_AT_OVID_SUBSCRIPTION_AUTOLOAD_TEST changed to BOOKS_AT_OVID_SUBSCRIPTION_AUTOLOAD –

AutoUpdate is now live

BOOKS_AT_OVID_PURCHASE_AUTOLOAD_TEST changed to BOOKS_AT_OVID_PURCHASE_AUTOLOAD –

AutoUpdate is now live

OVID_JOURNALS_AT_OVID_AUTOLOAD_TEST change to OVID_JOURNALS_AT_OVID_AUTOLOAD –

AutoUpdate is now live

Targets to be removed in the next (the 20163800) revision:

METAPRESS_HOGREFE_VERLAG – content can be found via HOGREFE_HUBER_JOURNALS

Targets to be removed in the 20164100 revision:

SPRINGER_LINK_BOOKS_LIFE_SCIENCE_CHEMISTRY_GERMAN – collection obsolete, content available via

SPRINGER_LINK_BOOKS_LIFE_SCIENCE_AND_BASIC_DISCIPLINES_GERMAN

Applying the Revision

The following packages are released:

sfx-kbsw-update-20163700.run

sfx-kbdb-update-20163700.run

sfx-sw-update-4.9.1.run

sfx-extra-update-4.9.1.run

For directions on applying the revision, refer to the **SFX KB Update** section of the *SFX General User's Guide*.

Highlights

OVID AutoUpdate - Automatic Download and Update of Entitlements in the SFX KnowledgeBase

In cooperation with Ovid we added a new process to SFX to automatically update the OVID packages with institutional entitlements. Similar to the Elsevier AutoUpdate service that we introduced last year, the process downloads an institution specific KBART file from Ovid, uploads it to SFX, and updates and activates Ovid content accordingly.

For this purpose, three new targets were added to the KnowledgeBase that are dedicated to the use of the AutoUpdate service. To be able to use the service you need to contact Ovid support. Refer to the Implementation Notes for further details.

Added Support for Date Coverage Limit by Year, Month, and Day in SFX

In addition to volume and issue SFX now also supports date coverage by "year", "month" and "day". This is particularly useful in cases where there is no volume and issue available, but for example a month is provided. Any valid rft.date value can now be used in the SFX menu, A-Z list and SFX Back Office applications: (a) full date YYYY-MM-DD ; (b) year and month: YYYY-MM ; or (c) only year: YYYY (used for books). Note that this is the first release in a series of changes. With the September release our customers are able to upload data with date coverage in month and day format and use it. The KB team's tools will be adjusted later this year, and in future we will be adding thresholds in that format also to the central Knowledgebase.

Added New Filters to the Target List on SFXAdmin > KBManager to Enable Result Filtering

With the increasing number of platforms and packages added to the KB there is also an increased need to provide more targeted search tools in KBManager to simplify navigation and maintenance. The new filters enable users of KBManager to limit the list of targets according to the following criteria: Full text targets, Local targets, New targets, and/or Targets set up to use proxy. This simplifies processes, for example, by ensuring that licensed targets are proxied and free targets are not proxied.

Upgrade to MariaDB 10.0.26

This release includes an upgrade to MariaDB 10.0.26 (from the previous version of MariaDB, version 10.0.21). The upgrade is included in an extra package that will be automatically applied as part of the Revision Update, together with the regular KB and SW changes.

The upgrade itself requires no downtime of the SFX server, but the new version will become active only after a restart of the SFX database software. Since the upgrade to 10.0.26 includes some security fixes, it is recommended to restart the SFX database software after applying the September Service Pack, for example in the next server maintenance window.

For more information about restarting the SFX database software, refer to the *SFX System Administration Guide*.

Changed KB Software

Type of Change	Component	Description	Solution	File List
Correction	TargetParser	Add exception to Springer::SPRINGER.	Exception added to Springer::SPRINGER so that linking reverts to the issue level when articles are indexed according to article number, rather than start page.	lib/Parsers/TargetParser/Springer/SPRINGER.pm
Correction	TargetParser	Update the NUMDAM::NUMDAM target parser.	The NUMDAM::NUMDAM target parser was updated to improve linking.	lib/Parsers/TargetParser/NUMDAM/NUMDAM.pm

New Targets and Target Services

Target Name	Description	Target Service	Linking Level	For More Information
BACON_AMERICAN_INSTITUTE_OF_PHYSICS_COUPERIN_BACKFILES_AND_FRONTLIST	American Institute of Physics package for BACON Consortium.	getFullTxt	ARTICLE	For more information: https://bacon.abes.fr/exporter.html
BACON_AMERICAN_INSTITUTE_OF_PHYSICS_COUPERIN_FRONTLIST	American Institute of Physics package for BACON Consortium.	getFullTxt	ARTICLE	For more information: https://bacon.abes.fr/exporter.html
BACON_AMERICAN_INSTITUTE_OF_PHYSICS_GLOBAL_ALLEBOOKS	American Institute of Physics package for BACON Consortium.	getFullTxt	BOOK	For more information: https://bacon.abes.fr/exporter.html
BACON_AMERICAN_INSTITUTE_OF_PHYSICS_GLOBAL_ALLJOURNALS	American Institute of Physics package for BACON Consortium.	getFullTxt	ARTICLE	For more information: https://bacon.abes.fr/exporter.html
BACON_AMERICAN_INSTITUTE_OF_PHYSICS_GLOBAL_OPENACCESS	American Institute of Physics package for BACON Consortium.	getFullTxt	ARTICLE	For more information: https://bacon.abes.fr/exporter.html
KARGER_BOOKS_2016	2016 collection of ebooks from Karger.	getFullTxt	JOURNAL	For more information: http://www.karger.com/
PROQUEST_AUSTRALIA_AND_NEW_ZEALAND_NEWSSTREAM	This database includes ongoing full-text academic journals published in Australia and New Zealand. The subjects cover major areas of study, including business, science, technology, engineering, social sciences, education, and humanities.	getFullTxt	ARTICLE	
PROQUEST_EUROPEAN_NEWSSTREAM	This database provides information pertinent to the study of business and finance topics across Europe, including academic journals, newspapers, newswires, and magazines.	getFullTxt	ARTICLE	
PROQUEST_AFRICAN_NEWSSTREAM	African Newsstream offers full text access newspapers, news wires, websites, and blogs from leading publishers throughout the region.	getFullTxt	ARTICLE	

Target Name	Description	Target Service	Linking Level	For More Information
PROQUEST_ASIAN_NEWSSTREAM	This database provides information pertinent to the study of business and finance topics across Asia, including academic journals, newspapers, newswires, and magazines.	getFullTxt	ARTICLE	
PROQUEST_CANADIAN_MAJOR_DAILIES	This is the core of Canadian Newsstand. Included are national and leading regional papers such as National Post, Calgary Herald, Edmonton Journal, Montreal Gazette, Ottawa Citizen, Regina Leader Post, Vancouver Sun, and the Victoria Times-	getFullTxt	ARTICLE	
PROQUEST_DELNET_ENGINEERING_AND_TECHNOLOGY_COLLECTION	DELNET (Developing Libraries network) ProQuest Engineering/Technology Collection provides full-text, scholarly journals and dissertations in support of the study of engineering sciences and technology fields.	getFullTxt	ARTICLE	
PROQUEST_DELNET_MANAGEMENT_COLLECTION	DELNET (Developing Libraries network) ProQuest Management Collection provides full-text, scholarly journals and dissertations in support of the study of management theory, practical applications, policy, functions, and strategy.	getFullTxt	ARTICLE	
PROQUEST_DELNET_SOCIAL_SCIENCES_AND_HUMANITIES_COLLECTION	DELNET (Developing Libraries network) ProQuest Social Sciences & Humanities provides full-text, journal articles, trade publications and consumer publications in Humanities and social sciences in	getFullTxt	ARTICLE	
PROQUEST_SNAPSHOTS_DATABASE	Market and industry data reports.	getFullTxt	ARTICLE	

Changed Programs – SFX Software

Type of Change	Components	Description	Related Documentation	File List	Defect Number	SI Number
Enhancement	APIs - External Integration	OVID AutoUpdate - automatic download and update of entitlements in KB	<i>SFX System Administration Guide and SFX Target Configuration Guide</i>	admin/kbtools/autoloader.pl admin/kbtools/autoloader_scheduler.pl admin/kbtools/elsevier_sd_autoloader.pl lib/Automation/BuisnessLogic/Ovid.pm lib/Automation/Downloader/Ovid.pm lib/Automation/Loader/Ovid.pm lib/Automation/Engine.pm lib/Automation/Loader.pm admin/kbtools/autoloader.cron lib/Automation/Loader/ElsevierSD.pm lib/Automation/Downloader/ElsevierSD.pm lib/Automation/BuisnessLogic/ElsevierSD.pm lib/Automation/BuisnessLogic/OvidStatics.pm lib/Automation/BuisnessLogic/ElsevierSDStatics.pm lib/Automation/AutoloaderStatics.pm lib/Automation/BuisnessLogic/AutoloaderUtilManager.p m lib/Automation/BuisnessLogic/KBARTSplitter.pm admin/server_admin_util lib/CentralJobManagement/ProblematicJobs.pm admin/filesystem/add_parameter_to_crontab.pl lib/Admin/TaskManager/UIParams.pm lib/Admin/TaskManager/TaskValidatorUtil.pm config/ovid_api.config__ config/ovid_autoloader.config_ config/central_management.config.cloud config/central_management.config__ revision_maker/applsw/patch-pre-4.9.1-1.pl revision_maker/applsw/patch-pre-4.9.1-2.pl revision_maker/applsw/rmlist	SFX-5847	

Type of Change	Components	Description	Related Documentation	File List	Defect Number	SI Number
Enhancement	Back Office - General (SFX)	Add support for date coverage limit by year, month and day in the SFX menu, A-Z List, and SFX Back Office. (PWG 2015/13). Before this change, only year, volume, and issue could be used in SFX thresholds. This has been changed. Any valid rft.date value can now be used in SFX: (a) full date YYYY-MM-DD ; (b) year and month: YYYY-MM ; or (c) only year: YYYY (used for books).	<i>SFX General User's Guide</i> and <i>SFX Advanced User's Guide</i>	lib/ContextObject/Generic.pm lib/ContextObject/Generic.t lib/MetaData/Validator/Threshold.pm lib/MetaData/Validator/Threshold.t templates/sfxctrl/threshold/compose.htm templates/sfxctrl/threshold/compose_light.htm templates/js/admin/threshold/composer.js lib/Threshold/Composer.pm lib/Admin/Tool/Kbart.pm lib/Admin/Tool/Kbart.t lib/Generic/ThresholdSetFactory.pm lib/Generic/ThresholdSetFactory.t lib/Parsers/TargetDisplayer.pm lib/SFXMenu/Output/HTML.pm lib/AZLIST/Base.pm lib/Threshold/Base.pm lib/Threshold/Base.t lib/Admin/Tool.pm lib/SFXMenu/Output/MultiObjDetailedXML.pm lib/Admin/Tool/SFX2Alma.pm lib/Contribution/ContributionItem/Portfolio.pm lib/Parsers/ThresholdParser.pm revision_maker/applysw/adjust_sfxctrl_config_with_month_day_support.pl revision_maker/applysw/adjust_sfxctrl_config_with_remove_month_day_from_external_threshold.pl revision_maker/applysw/foreachinstance.pl	SFX-5979	

Type of Change	Components	Description	Related Documentation	File List	Defect Number	SI Number
Enhancement	Back Office - General (SFX)	Add filters to the target list in the SFX Admin Center to filter the target list by proxied, free, and local.	SFX General User Guide	templates/js/sfxctrl/target/target.js templates/sfxctrl/target/list.htm templates/sfxctrl/target/target_parent.htm lib/Admin/KBManager/Target.pm lib/DBLayer/Interface.pm templates/css/sfx_admin.css lib/Generic/ObjectAccess.pm templates/js/sfxctrl/target/bundle_target.js templates/img/sfxadmin/remove.gif	SFX-6098	
Enhancement	Back Office - General (SFX)	Add information to Export Tool > Basic export > Target list about proxied, free, and local targets.	SFX General User Guide	lib/DBLayer/Target.pm lib/Admin/Tool.pm	SFX-6113	
Enhancement	SFX Menu - SFX Menu	Add IP exclude functionality to EZPROXY proxy module to allow customer to add an IP/IP range for which proxy functionality will not be enabled. The configuration file to use is: /exlibris/sfx_ver/<instance>/config/proxy_ezproxy.config	<i>SFX General User's Guide</i>	config/proxy_ezproxy.config lib/Parsers/Proxy/EZPROXY.pm	SFX-6194	
Defect	Utilities - Revision Update	Include upgrade for MariaDB 10.0.26 in the SFX package.		revision_maker/applyextra/extra.conf	SFX-6377	

Type of Change	Components	Description	Related Documentation	File List	Defect Number	SI Number
Defect	APIs - External Integration	Add an exception to not use EBSCO API to check EBSCO targets before they are displayed in the SFX menu if a specific flag exists in the Object Portfolio parse_param (exception=no_date). For some Ebsco Portfolios, the year information in different SFX sources varies, making it problematic to do a pre-check via the EBSCO API.	<i>SFX Advanced User's Guide</i>	lib/Parsers/PlugIn/Ebsco.pm	SFX-6193	209207
Defect	Back Office - General (SFX)	In Broken Link Report configuration, the checkbox Allow end user... will be disabled if the email value is empty. This may be confusing to customers, so we added some help text that is displayed when clicking "?" to explain why the checkbox is disabled.		templates/sfxctrl/custom/simplified_and_mobile_configuration.tmpl	SFX-5850	
Defect	Back Office - KBManager	Solved navigation issue in KBManager > Target List section when using the Show Active and Show All buttons in combination with next page links. The target list does not automatically go back to page one of the results, causing an empty page to appear in some cases.		templates/sfxctrl/target/list.htm	SFX-6226	

Type of Change	Components	Description	Related Documentation	File List	Defect Number	SI Number
Defect	Back Office - KBManager	Fixed the problem with an incorrect count of the number of subtargets for a specific target in KB Manager -> List of Targets screen.		lib/DBLayer/Interface.pm	SFX-6279	230629
Defect	Back Office - KBManager	Fixed inconsistency if an ISBN is selected to be displayed in the Object Portfolio list and the Objects list in SFX Admin Center, if multiple ISBNs exist for an object.		lib/DBLayer/ObjectIdentifiers.pm	SFX-6281	
Defect	Back Office - Task Manager	Added an option in Task Manager to select the Default institute for Google Scholar export. Also, fixed display of Institute information in View/Edit Profile windows for the Google Scholar, Primo, and Marclt exports.		lib/Admin/TaskManager/ScheduledTasks.pm lib/Admin/TaskManager/UIParams.pm	SFX-6195	211237
Defect	Back Office - Task Manager	Fixed Centralized Management of Maintenance tasks jobs with frequency type <code>specific_dates</code> to be shown in Calendar of Upcoming Tasks.		lib/Admin/TaskManager/ScheduledTasks.pm	SFX-6254	

Type of Change	Components	Description	Related Documentation	File List	Defect Number	SI Number
Defect	BO KB Tools - Collection Tool, Localization Manager	In the Collection Tool and Localization Manager, there is a potential discrepancy between the server time and the browser time. This was fixed by making the Localization Tool and Collection Tool use server time instead of browser time.		templates/sfxctrl/collection/collection_wizard_one_set_active.html templates/sfxctrl/collection/collection_wizard_one_set.html templates/sfxctrl/collection/collection_wizard_two_set.html templates/js/util/server_time.js templates/js/admin/collection_wizard.js templates/js/admin_tools/localization/common/scheduler.js	SFX-6177	214063
Defect	SFX Menu - SFX Menu	The ELSEVIER_SCIENCE_DIRECT_AUTOLOAD_JOURNALS was added to list of targets excluded from DirectLink Banner. This vendor does not allow viewing its Web content in a frame.		dbs/sqltab/CONTROL.tab revision_maker/applysw/patch-pre-4.9.1-3.pl	SFX-6258	221237
Defect	SFX Menu - SFX Menu	The priority for choosing the ISBN for display in the SFX Menu was changed to ensure ISBN with hyphens have a higher priority.		lib/ContextObject/Engine/Augmentation.pm	SFX-6146	
Defect	SFX Menu - SFX Menu	Added out-of-the-box display logic rules for Elsevier autoloader.		dbs/sqltab/CONTROL.tab	SFX-6283	
Defect	SFX Menu - SFX Multi object menu	Fixed the problem with sort order of values in the multi-object menu drop-down list to change the number of records per page (in the SFX Front End and Back office configuration).		sfxadmin/custom.cgi lib/MultiObject/Engine.pm	SFX-6259	

Type of Change	Components	Description	Related Documentation	File List	Defect Number	SI Number
Defect	Utilities - Server Admin Util	Fixed the diagnostic program for MariaDB for new SFX installations. The admin/diagnostics/instnace_health.pl script was changed to check SPHINX only if no MariaDB is in use.		lib/Manager/Instance/Checkup.pm	SFX-6253	

Implementation Instructions

Ovid Automated Download and KB Loader

Journals@Ovid and Books@Ovid package entitlements are customer specific. To make it easier to localize the SFX KB, Ovid provides an automated process for downloading customer holding files in KBART.

A new option has been added in the SFX Server Admin Utility to automatically download the Ovid holdings file and update the KB (activate and load local coverage).

Three new dedicated targets have been added to the SFX KB to work with the automated load option:

- OVID_JOURNALS_AT_OVID_AUTOLOAD
- BOOKS_AT_OVID_SUBSCRIPTION_AUTOLOAD
- BOOKS_AT_OVID_PURCHASE_AUTOLOAD

The recommended schedule for this autoloader process is monthly. This option has also been added to the Centralized Management of Maintenance Tasks.

The program will:

- 1 Download the Ovid customer holdings file in KBART format, using customer specific credentials stored in the Ovid configuration file.
- 2 Split the file into a monograph and serial file, based on the KBART `publication_type` field (serial or monograph) and store two separate files locally in the SFX scratch directory.
- 3 Split the monograph file once more, based on information in the KBART **Notes** field, to distinguish between **Subscription** versus **Purchase** type of Books@Ovid holdings.
Note: If the `publication_type` column contains no value in this field or the book entries do not include `subscription` or `purchase`, the record is skipped.
- 4 For either the default or for only one institute/group specified in the run of the program, run dataloader for downloaded and split files to activate and add local thresholds for dedicated Ovid targets:
 - OVID_JOURNALS_AT_OVID_AUTOLOAD
 - BOOKS_AT_OVID_SUBSCRIPTION_AUTOLOAD
 - BOOKS_AT_OVID_PURCHASE_AUTOLOAD
- 5 Portfolios not included in the load file are deactivated.

A report is provided with:

- Information if there are problems during the download or deactivation
- A reference to the location of the dataloader report files

Configuration for Consortia

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

Note: For consortia API customers, all Ovid target activation are done in the local instance, in case they want to use the autoloader.

The Ovid file contains all holdings per institution, regardless of whether the books/journals are purchased by the consortium or locally.

Perform the following steps to switch from manually activated Ovid targets to the new automated process:

- 1 Set up is required on the Ovid side before the automated download of holdings information will work. Contact Ovid Customer Support (support@ovid.com) for a Web user account and password and to enable the Ovid group for the KBART API.
- 2 Check the Web user name, password, and OvidGroup received from Ovid Customer Support by executing the following URL:

<https://charlotte.ovid.com:8443/OrionAPI/rest/Reporting/KBARTHoldings/{OvidGroup}?UserName={username}&Password={password}>

The URL should return a tab-limited KBART file similar to this:

publication_title	print_identifier	online_identifier	date_first_issue_online	num_first_voi_online	num_first_issue_online	date_last_issue_online	num_last_voi_online	num_last_issue_online
5-Minute Clinical Consult 2009, The	978-0-7817-7957-9							
5-Minute Clinical Consult 2009, The	978-0-7817-7957-9							
5-Minute Infectious Diseases Consult	978-0-8933-0736-8							
5-Minute Obstetrics & Gynecology Consult, The	978-0-7817-6942-6							
5-Minute Orthopaedic Consult	978-0-7817-8971-3							
5-Minute Pediatric Consult, The	978-0-7817-7977-9							
5-Minute Pediatric Consult, The	978-0-7817-7977-9							
5-Minute Sports Medicine Consult	978-0-7817-3045-7							

Note: Ovid Customer Support does not know the Web user password and is not able to test the URL. If the URL returns the following error message, contact Ovid Customer Support (support@ovid.com):

```
{"_retVal":"","_errors":[{"_errorMsg":"ERROR condition: This is not a valid group for your login (7211)","_errorNum":2036}]}
```

- 3 After a successful test, the OvidGroup, place the Web username and Password from Ovid in the following configuration file together with the email address of SFX administrator:

config/ovid_autoloader.config_

- 4 In KBManager, activate the three dedicated targets and their getFullTxt target services:

- OVID_JOURNALS_AT_OVID_AUTOLOAD
- BOOKS_AT_OVID_SUBSCRIPTION_AUTOLOAD
- BOOKS_AT_OVID_PURCHASE_AUTOLOAD

- 5 Activate the new display logic rules: for example: for journals:

If available: OVID_JOURNALS_AT_OVID_AUTOLOAD getFullTxt

Do not show: OVID_JOURNALS_AT_OVID getFullTxt

This rule prevents end users from seeing duplicate Ovid targets in the SFX menu during the transition period.

- 6 Run Ovid autoloader option from the Server Admin Utility:

- a Start the Server Admin Utility in the local instance.
- b Select **8 - Import/Exports** and then **5 - Ovid Autoloader**.

- 7 Set up a scheduled task to run Ovid Automated load once a month, either per local instance or via the Centralized Management of Maintenance Tasks option.
- 8 Optionally: Use **KBTools > Collection tool** from the SFX Admin Center to compare the activation and thresholds between the new autoloader targets and the previously manually activated targets. This allows you to check that all activations are now in place in the new dedicated Ovid targets.
- 9 Deactivate the old, manually activated targets and portfolios.