



The Alma/SFX AutoUpdate Service

Information for content providers

Institutions subscribing to the Alma/SFX KnowledgeBase can also utilize the AutoUpdate Service, an automatic service that regularly updates their entitlements with information retrieved from their content providers. This service requires content providers to provide customer holdings files in KBART II format and an API to allow for the regular request and transfer of the file, as well as to provide regular title lists to Ex Libris. This document provides an overview of the technical requirements for content providers who are participating in this service.

Requirements

1. **A KBART II¹ file per individual institution**, containing the institution's entitlements, updated regularly
 - Ideally there should be separate files for ebooks and ejournals but one file is also acceptable
 - The file should provide a complete list. For institutions that purchase individually and in addition have entitlements via a consortia membership the file should include ALL entitlements
2. **API to allow Alma/SFX to automatically retrieve the KBART II holdings file per customer.** For the call a URL is required. This URL can be defined by the content provider. Together with the URL the link resolver sends two HTTP headers for the content provider to identify where the request is coming from and what it is for.

Example for content provider URL: `https://<Provider-hostname_and_path>?format=KBART`

HTTP headers

X-PROVIDER-APIKey <APIKey>

X-PROVIDER-Insttoken <insttoken>

HTTP header description

APIKey = Issued by the content provider. This is the same for all customers and enables the content provider to identify the request coming from a specific link resolver product. Please provide one key for SFX, and another for Alma. You can for example just use the product names (“sfx” and “alma”). Alternatively, you can also choose to use the same for both, for example “exlibris”.

Insttoken = Issued by the content provider. This is a unique token for each institution for the content provider to identify the request being for a specific customer. This may be a static or dynamically generated token – as defined by the provider.

3. **KBART II files reflecting the content provider’s offerings** for Ex Libris to keep the associated packages in the KnowledgeBase up to date

Ex Libris creates dedicated title lists (referred to as packages) for the automatic service in the KnowledgeBase. These packages are used to activate and update customer’s entitlements via the automated services for each vendor. The KBART files for Ex Libris must therefore contain all titles, including their date coverage, that a customer can possibly subscribe to. They must be updated at least with the same frequency as the customer files.

Testing Period

Please provide Ex Libris with an apiKey and insttoken for testing while the service is established. During the testing period the HTTP headers call can also be send as part of the URL. This is however not recommended once going into production, for security reasons. The URL format is as follows:

`https://<Provider-hostname_and_path>?format=KBART&apiKey=<apiKey>&insttoken=<insttoken>`

Contact

If you have any questions or if you would like to participate in this service, please contact dana.sharvit@exlibrisgroup.com

¹ <http://www.niso.org/publications/rp/rp-9-2014/>