



## SFX KBTools DataLoader

***Note:** The following exercise should be performed on the test environment.*

### 1.1 DataLoader- Portfolios tab.

1. Find 2 inactive object portfolio in the WILEY\_ONLINE\_LIBRARY\_JOURNALS target you would like to activate.
2. Create a TXT file, with the **ISSN** and the **requested activation status** (ACTIVE/INACTIVE).  
Save it as DataLoader exercise.txt
3. Use the Portfolios tab.
4. Select Target + Service - choose WILEY\_ONLINE\_LIBRARY-getFullTXT.
5. Select subtarget + Service - choose WILEY\_ONLINE\_LIBRARY\_JOURNALS-getFullTXT.
6. Specify input file name - click on BROWSE, and upload the prepared file – "DataLoader exercise.txt".
7. Select the type of each column in your input file:
  - a. Column 1 (Primary Key) – choose ISSN out of drop down menu.
  - b. Column 2 – choose ACTIVATION\_STATUS.
8. Load Type- select the following checkboxes:
  - a. Update Portfolios
  - b. Activate targets(s) / target\_service(s)
9. Click on "Submit".
10. Download the <file\_name>.ok.err file, copy the content to Excel and check if there are errors.

## 1.2 DataLoader- Portfolios tab.

1. Go back to the file you created (DataLoader exercise.txt).  
Change the 2<sup>nd</sup> ISSN to 9999-1111, and save the file as DataLoader exercise 2.txt
2. Use the Portfolios tab.
3. Select Target + Service - choose WILEY\_ONLINE\_LIBRARY-getFullTXT.
4. Select subtarget + Service - choose WILEY\_ONLINE\_LIBRARY\_JOURNALS-getFullTXT.
5. Specify input file name - click on BROWSE, and upload the prepared file – "DataLoader exercise 2.txt".
6. Select the type of each column in your input file:
  - a. Column 1 (Primary Key) – choose ISSN out of drop down menu.
  - b. Column 2 – choose ACTIVATION\_STATUS.
7. Load Type- select the following checkboxes:
  - a. Update Portfolios
  - b. Activate targets(s) / target\_service(s)
8. Click on "Submit".
9. Download the <file\_name>.ok.err file, copy the content to Excel and check if there are errors.

## 1.3 DataLoader-Update Objects tab.

1. Go back to the first file you created (DataLoader exercise.txt).
2. Replace the activation status with local catalog numbers.
3. Use the Update Objects tab.
4. Specify input file name- click on BROWSE, and upload the prepared file.
5. Select the type of each column in your input file:
  - a. Column 1 (Primary Key) – choose ISSN out of drop down menu.
  - b. Column 2 – choose LOCAL out of the drop down menu.
6. Load Type- click on one of the checkboxes:
  - a. Overwrite Existing Attributes
7. Click on "Submit".
8. Download an analysis of the data file and view it.
9. Download the Cleaned Copy and view it.