



SFX Product Update

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Agenda

- SFX and CDI
- Upcoming enhancements for CDI
- SFX enhancements from the past 12 months
- Focus areas for SFX





SFX and CDI


CDI targets in KBManager


- **CDI types of targets**

- **Link targets:** Are used in CDI for full text and search activation in one single flow
- **Search targets:** Added to the SFX KnowledgeBase to allow activation for discovery

- **Activation types for CDI**

- For **linking and full text availability**
- For **discovery** in CDI

  Active (Yes/No)

 Active/Inactive for Discovery (CDI)



KBManager > Target list > Filters

List of Targets

[Add New Target](#)

[Delete](#) [Activate](#) [Deactivate](#) [Activate for Search](#) [Deactivate for Search](#)

[Show All](#) [Show All Active](#) [Show Active for Search](#) [Show Active for Full Text](#) [Show Inactive](#)

Show targets per page

Available: 1855 targets Database: sfxtest

Filter Target List by: Name

Filter Target List by: Type All Targets Link Targets Search Targets

[Add Condition](#)

DIGITAL_COLLECTION_UNIVERSITY_OF_RHODES to AMERICAN_JUDGES_ASSOCIATION

#		+	Target	Threshold			ied	Loc.	Active	Action		
<input type="checkbox"/>	1	E	V	DIGITAL_COLLECTION_UNIVERSITY_OF_RHODES						NEW		
<input type="checkbox"/>	2	E	V	101COMMUNICATIONS_PUBLICATIONS								
<input type="checkbox"/>	3	E	V	123LIBRARY								
<input type="checkbox"/>	4	E	V	1FINDR								
<input type="checkbox"/>	5	E	V	856_URL								
	6	+	A-R-EDITIONS (2)									
<input type="checkbox"/>	7	E	V	AAPGDATAPAGES								
<input type="checkbox"/>	8	E	V	AASLH_PUBLICATIONS								
<input type="checkbox"/>	9	E	V	AA_Corona_Covid_19_Resources_LCL								
<input type="checkbox"/>	10	E	V	AA_LOCAL_OPAC_RMH_LCL								
<input type="checkbox"/>	11	E	V	AA_LOCAL_OPAC_RWH_LCL								
	12	+	ABC-CLIO (15/36)									
<input type="checkbox"/>	13	E	V	POP_CULTURE_UNIVERSE		S	P	2021/10/24				C
<input type="checkbox"/>	14	E	V	FREE_FULL_TEXT_JOURNALS_IN_CHEMISTRY		S	P	2021/10/01				C
<input type="checkbox"/>	9	E	V	AA_Corona_Covid_19_Resources_LCL		S	P	2020/08/04				C
<input type="checkbox"/>	10	E	V	AA_LOCAL_OPAC_RMH_LCL		S	P	2016/06/15				C
<input type="checkbox"/>	11	E	V	AA_LOCAL_OPAC_RWH_LCL		S	P	2015/10/12				C
	13	E	V	POP_CULTURE_UNIVERSE		S	P	2021/07/21				C
<input type="checkbox"/>	14	E	V	FREE_FULL_TEXT_JOURNALS_IN_CHEMISTRY		S	P	2022/02/28				C
	15	+	ABC_CLIO (5)									
<input type="checkbox"/>	16	E	V	ABC_ES		S	P	2021/10/01				C

KBManager > Target list > Filters

New **hybrid value** to two target search filters in KBManager: CDI Fulltext Rights and CDI Linking

https://knowledge.exlibrisgroup.com/Primo/Content_Corner/Central_Discovery_Index/Knowledge_Articles/Hybrid_Collections_in_CDI

Filter Target List by: Name ?

Filter Target List by: Type All Targets Link Targets ? Search Targets ?

CDI Fulltext Rights

OpenAccess
OpenAccess
Subscription (Linkresolver)
Subscription (Collection Level)
Partially Open Access
Hybrid

	Modified	Loc.	Active	Action
	2022/03/08		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S P	2021/04/29		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S P	2022/02/28		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	2022/02/14		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	2021/04/29		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S P	2021/10/24		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S P	2021/10/01		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S P	2020/08/04		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S P	2016/06/15		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S P	2015/10/12		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S P	2021/07/21		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S P	2022/02/28		<input checked="" type="checkbox"/>	<input type="checkbox"/>
S P	2021/10/01		<input checked="" type="checkbox"/>	<input type="checkbox"/>

KBManager > Target list > Edit Target window

Fixed the bad alignment and cleaned up the display

Main Additional details

Edit Target - main tab

Target	BIOMED_CENTRAL_JOURNALS_COMPLETE
Public name(global)	BioMed Central Journals Complete + Add local
General description	For More Information: http://www.biomedcentral.com
Activation status:	<input type="radio"/> Active <input checked="" type="radio"/> Inactive
Threshold(global)	+ Add local
Character Set	iso-8859-1
Aggregator ?	No
Target Type	Journal

Authentication note

General Note

Internal description

DB ID BMC

Available for CDI discovery activation [?](#) Yes

This target is searchable via CDI - with the following setting:

Search rights	Free
Fulltext rights	OpenAccess
Linking	Linkresolver
Newspaper ?	No
Number of records	7256521
Resource Types	ejournal, conference proceeding, publication, dissertation, reference
CDI update frequency	Monthly
Provider coverage	Yes ?
Coverage Percentage	99% - Calculated on 01/09/2020
CDI Type	Full Text Collection
CDI Last Market update	16/02/2022 ?

Active in:

SFX for linking and full text availability [?](#)

CDI for discovery [?](#)

Selective ? [?](#)

Do not show as Full Text available in CDI even if active in SFX

[Close Window](#) [Submit](#)

Other CDI enhancements in SFX

- **Linking improvement:** Support for **multiple ISBNs in OpenURL** from Primo/CDI
- Added help text to the 'Filter Target List by type' options
- Allow **CDI_Administrator** to access 'View target' window
- New option to use the **search activation function for A&I databases** (in addition to the full activation)
- Faster Rights processing for customers with large files (delta processing)
- New option to export **targets available for discovery activations**

Basic Export Queries | Advanced Export Queries | Advanced Export Profiles

Query Selection

Export [Active] object_portfolios Current field
from [All target services]

Export [Active] object_portfolios Current field
from [All target services]
which contain local thresholds.

Export [Active] locally created object_portfolios Current field
from [All target services]

Export [Active] [Search Targets] [TARGETS]

Export [All] targets available for CDI discovery/search activation
[All]
ACTIVE for Discovery/Search
ACTIVE for full text
ACTIVE for either full text or Discovery/Search

Count where

Export URLs from active targets/target_services (and active object_portfolios they may contain).

Export objects with local attributes.

(in



Coming for CDI

- Ongoing: **Linking improvements** for CDI by making use of additional **provider specific IDs**
- **Faster rights processing**: Reduce processing time significantly, to a stable 24 – 48 hours
- Setting of **Linking preferences** for link in record collections and Quicklinks
 - Prioritize providers if there is more than one link (default is alphabetically)



Documentation on the KnowledgeCenter

https://knowledge.exlibrisgroup.com/SFX/Product_Documentation/01_Version_4.0/Target_Activation_for_Discovery_with_Primo_and_CDI



Target Activation for Discovery with Primo and CDI



With SFX you can control what results from CDI are displayed in Primo by activating/de-activating your licensed full text in KBManager. In addition, you can also activate targets simply for search in CDI for your users to discover content beyond your library collection. Because of the diversity of e-resource collections, there are also different types of targets for CDI in SFX and different ways to activate them. This series of articles describes the different types of targets, how to activate them, how CDI consumes the activation information from SFX and what the user sees in Primo as a result of the activations. This information is also available in the user guides, but the articles provide a more targeted view of CDI functionality in SFX.

The following articles are available:

- [Target Activation for CDI in SFX – Overview](#)
- [Finding Targets for CDI in KBManager](#)
- [Activating Targets/Collections for CDI by Collection Type for Discovery](#)
- [Activating Targets in SFX for Full Text Linking and Discovery](#)
- [CDI Configuration Settings for Individual Targets](#)
- [CDI Descriptive Fields in the Edit Target Window in SFX KBManager](#)
- [Activation of A&I Databases for Discovery](#)
- [FAQ - Activation and Activation Settings](#)
- [CDI Collection Lists for SFX Customers](#)
- [Publishing SFX Institutional Holdings to CDI](#)

For general questions about CDI
cdi_info@exlibrisgroup.com





SFX enhancements from the past 12 months

KBART automation

- General article

https://knowledge.exlibrisgroup.com/SFX/Knowledge_Articles/KBART_Automation%3A_Automatic_Updates_to_Your_Library_Holdings

- Now available for **Wiley** (released in December 2021)

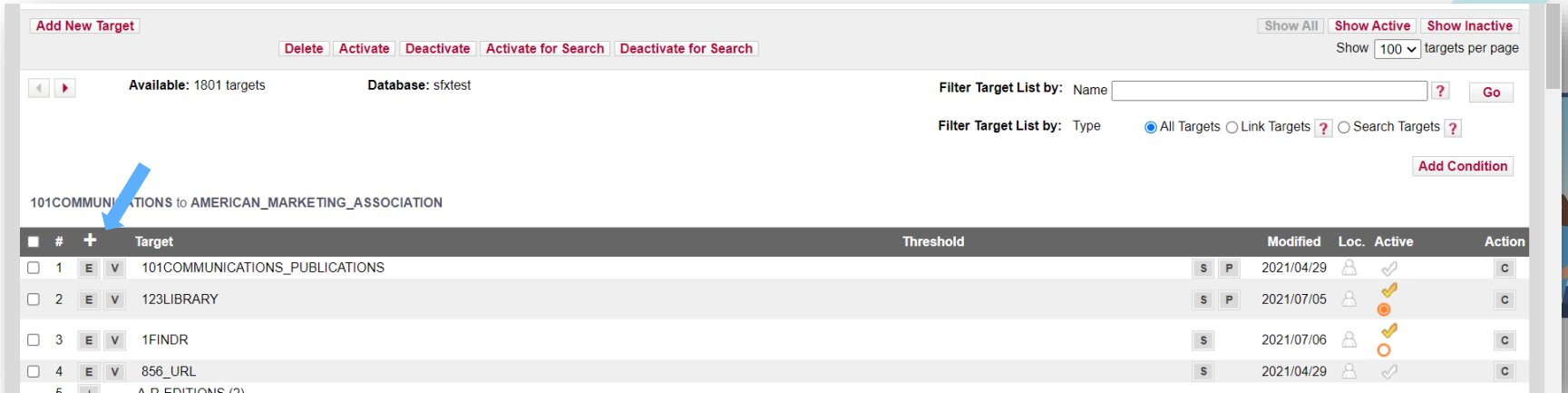
https://knowledge.exlibrisgroup.com/SFX/Knowledge_Articles/Using_the_Wiley_AutoLoader_for_SFX

- Planned for this year: **Taylor & Francis**

The screenshot shows the ExLibris Knowledge Center interface. At the top, it says 'ExLibris Knowledge Center Part of Clarivate'. There are buttons for 'More Sites', 'System Status', and 'Submit a Case'. A search bar is present with the text 'Search under current path'. The breadcrumb trail is 'Home > SFX > Knowledge Articles > KBART Automation: Automatic Updates to Your Library Holdings'. The main heading is 'KBART Automation: Automatic Updates to Your Library Holdings'. Below the heading, there is a paragraph explaining that SFX supports KBART automation, which is a recommended NISO practice for the automated transfer of library holdings from a content provider to a Knowledgebase. It also lists providers supported by SFX: Springer Nature, Elsevier, Ovid, and Wiley. At the bottom, there is a diagram showing the KBART automation flow with SFX, involving a 'Content provider' and an 'Institution/Library'.

KBManager – Target list

- New option in **target list** to open all interfaces (instead of having to click on all the '+' signs separately)



The screenshot shows the KBManager Target List interface. At the top, there are buttons for 'Add New Target', 'Delete', 'Activate', 'Deactivate', 'Activate for Search', and 'Deactivate for Search'. On the right, there are filters for 'Show All', 'Show Active', and 'Show Inactive', along with a 'Show 100 targets per page' dropdown. Below these are search filters for 'Name' and 'Type' (All Targets, Link Targets, Search Targets). The main area displays a table of targets with columns for '#', '+', 'Target', 'Threshold', 'Modified', 'Loc.', 'Active', and 'Action'. A blue arrow points to the '+' icon in the table header.

#	+	Target	Threshold	Modified	Loc.	Active	Action
1	<input type="checkbox"/>	101COMMUNICATIONS_PUBLICATIONS		2021/04/29	S P	✓	C
2	<input type="checkbox"/>	123LIBRARY		2021/07/05	S P	✓	C
3	<input type="checkbox"/>	1FINDR		2021/07/06	S	○	C
4	<input type="checkbox"/>	856_URL		2021/04/29	S	✓	C
5	<input type="checkbox"/>	A.B.EDITIONS (2)					

Other additions/changes - KBManager

- **New language options** for SFX objects were added: Armenian, Bengali, Croatian, Greenlandic/Kalaallisut, Marathi, Scottish Gaelic, Zulu and Kurdish
- The **"Send to Ex Libris"** function was changed to point to the new support center
- Added a new configuration option to **deny or allow IP** addresses or ranges from accessing SFX services.
- New option for the **Broken Link report feature** to not require the user to provide an email address when adding a note



Coming next and focus areas for SFX

- **KBManager** – simplify activation workflows
 - With and without CDI
 - Shortcuts and added functions
- Requests **from you, our customers**
- **KBART automation**
- **Performance**



Thank you!

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