



# SFX Product Update

Christine Stohn



# 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 ?

FullText | Yes  Add Condition

Free  FullText  Local  New Targets  Using Proxy  Available for CDI discovery activation  CDI Search Rights  CDI Fulltext Rights  CDI Linking  Contains Newspapers in CDI  Provider coverage  CDI Type  Selective  Do not show as Full Text in CDI even if active in SFX

Go

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				3/08				C
<input type="checkbox"/>	3	E	V	123LIBRARY				4/28				C
<input type="checkbox"/>	4	E	V	1FINDR				2/28				C
<input type="checkbox"/>	5	E	V	856_URL				2/14				C
<input type="checkbox"/>	6	+		A-R-EDITIONS (2)				4/29				C
<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								
<input type="checkbox"/>	12	+		ABC-CLIO (15/36)								
<input type="checkbox"/>	13	E	V	POP_CULTURE_UNIVERSE								
<input type="checkbox"/>	14	E	V	FREE_FULL_TEXT_JOURNALS_IN_CHEMISTRY								
<input type="checkbox"/>	15	+		ABC_CLIO (5)								
<input type="checkbox"/>	16	E	V	ABC_ES								

# 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](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

			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="button" value="C"/>
	S	P	2022/02/28		<input checked="" type="checkbox"/>	<input type="button" value="C"/>
	S		2022/02/14		<input checked="" type="checkbox"/>	<input type="button" value="C"/>
	S		2021/04/29		<input checked="" type="checkbox"/>	<input type="button" value="C"/>
	S	P	2021/10/24		<input checked="" type="checkbox"/>	<input type="button" value="C"/>
	S	P	2021/10/01		<input checked="" type="checkbox"/>	<input type="button" value="C"/>
	S	P	2020/08/04		<input checked="" type="checkbox"/>	<input type="button" value="C"/>
	S	P	2016/06/15		<input checked="" type="checkbox"/>	<input type="button" value="C"/>
	S	P	2015/10/12		<input checked="" type="checkbox"/>	<input type="button" value="C"/>
	S	P	2021/07/21		<input checked="" type="checkbox"/>	<input type="button" value="C"/>
	S	P	2022/02/28		<input checked="" type="checkbox"/>	<input type="button" value="C"/>
	S	P	2021/10/01		<input checked="" type="checkbox"/>	<input type="button" value="C"/>

localized/Local  Internal Description exists  Active/Inactive for Discovery (CDI)

# KBManager > Target list > Edit Target window

Fixed the bad alignment and cleaned up the display

The screenshot shows the 'Edit Target' window in KBManager. The window has a red header with 'Main' and 'Additional details' tabs. The main content area is titled 'Edit Target- main tab' and contains the following fields and settings:

Target	BIOMED_CENTRAL_JOURNALS_COMPLETE
Public name(global)	BioMed Central Journals Complete <a href="#">+ Add local</a>
General description	For More Information: <a href="http://www.biomedcentral.com">http://www.biomedcentral.com</a>
Activation status:	<input type="radio"/> Active <input checked="" type="radio"/> Inactive
Threshold(global)	<a href="#">+ Add local</a>
Character Set	iso-8859-1
Aggregator ?	No
Target Type	Journal
Authentication note	<input type="text"/> <a href="#">?</a>
General Note	<input type="text"/> <a href="#">?</a>
Internal description	<input type="text"/> <a href="#">?</a>
DB ID	BMC
Available for CDI discovery activation <a href="#">?</a>	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 <a href="#">?</a>
Coverage Percentage	99% - Calculated on 01/09/2020
CDI Type	Full Text Collection
CDI Last Market update	16/02/2022 <a href="#">?</a>

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

- Added help text to the 'Filter Target List by type' options
- Faster Rights processing for customers with large files (delta processing)
- New option to export **targets available for discovery activations**

The screenshot shows the 'Basic Export Queries' section of the SFX interface. It features a 'Query Selection' header and several radio button options for exporting data. The selected option is 'Export [All] targets available for CDI discovery/search activation'. A dropdown menu is open for this option, showing the following choices: 'All', 'ACTIVE for Discovery/Search', 'ACTIVE for full text', and 'ACTIVE for either full text or Discovery/Search'. Other options include 'Export [Active] object\_portfolios', 'Export [Active] object\_portfolios which contain local thresholds.', 'Export [Active] locally created object\_portfolios', 'Export [Active] Search Targets [TARGETS]', 'Export URLs from active targets/target\_services (and active object\_portfolios they may contain).', and 'Export objects with local attributes.'





# Coming and ongoing for CDI

- Ongoing: **Linking improvements** for CDI by making use of additional **provider specific IDs**
- Ongoing: **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](https://knowledge.exlibrisgroup.com/SFX/Product_Documentation/01_Version_4.0/Target_Activation_for_Discovery_with_Primo_and_CDI)



SFX

Search under current path



Home » SFX » Product Documentation » 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](mailto: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 Holding](https://knowledge.exlibrisgroup.com/SFX/Knowledge%20Articles/KBART%20Automation%3A%20Automatic%20Updates%20to%20Your%20Library%20Holdings)  
[S](#)

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

[https://knowledge.exlibrisgroup.com/SFX/Knowledge Articles/Using the Wiley AutoLoader for SFX](https://knowledge.exlibrisgroup.com/SFX/Knowledge%20Articles/Using%20the%20Wiley%20AutoLoader%20for%20SFX)

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

The screenshot shows the ExLibris Knowledge Center website. The page title is "KBART Automation: Automatic Updates to Your Library Holdings". The breadcrumb trail is "Home » SFX » Knowledge Articles » KBART Automation: Automatic Updates to Your Library Holdings". The main content area contains the following text:

SFX supports KBART automation. KBART automation is a recommended NISO practice for the automated transfer of library holdings from a content provider to a Knowledgebase. The purpose is to localize the KnowledgeBase automatically by activating and deactivating titles in a title list, based on what the library has access to on the content provider's platform. Especially for ebooks, but also for ejournals, this practice can save the library work and time and make content faster available to the library patrons. KBART automation requires an API on the content provider side that allows the download of a KBART formatted holdings file, a unique token or key identifying the individual institution, and a process on the KnowledgeBase side to query the API, download the holdings file on a regular basis, and localize a collection (target) that is specifically added for this purpose.

SFX currently supports KBART automation for the following providers:

- Springer Nature
- Elsevier
- Ovid
- Wiley

The following figure shows the KBART automation flow with SFX:

The diagram shows a flow from a "Content provider" (represented by a blue location pin icon) to an "Institution/Library" (represented by a green location pin icon).

# 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
- New field to add an edition to **local objects**
- Enhancement to **statistics query #5** to allow grouping by source



# Just released

- New field to add an edition to **local objects**
- Enhancement to **statistics query #5** to allow grouping by source



# 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!

[christine.stohn@clarivate.com](mailto:christine.stohn@clarivate.com)

