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

IGELU
Conference
12th –15th September 2022

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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)

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KBManager > Target list > Filters

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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

KBManager > Target list > Edit Target window

Fixed the bad alignment and cleaned up the display

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**

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)

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Documentation on the KnowledgeCenter

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

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Search under current path 🔍

SFX

📁 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

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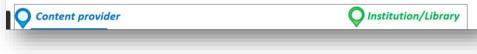
- Planned for next year: **Taylor & Francis**

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

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Just released

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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**

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Thank you!

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