

SFX Product Update

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Agenda

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





SFX and CDI

Define your CDI linking preferences in SFX for collections using the link in record/Quicklinks

Central Discovery > Configuration

Edit Discovery Configuration

Name*	<input type="text" value="Green University"/>
PC Key*	<input type="text" value="exl.GREEN.PPRD"/>
CustomerID*	<input type="text" value="389fa1c486477d9493367301"/>
Institute Name	<input type="text" value=""/>
Note:	<input type="text" value=""/>

You have 255 characters remaining

CDI linking provider preference

Available

- Science
- ABC-CLIO
- AFFRIT
- ARTstor
- ASM International
- ASTM International
- Accessible Archives
- Adam Matthew Digital
- Agence Bibliographique de l'Enseignement Supérieur
- Alexander Street Press



Chosen providers order


-

Providers not included in the ordered list will be listed below the ones you selected and will be displayed in alphabetical order.

* Required field

Cancel

Save



Move2CDI	Report file	Provider preference
Not moved	No report file	Not Defined

Home → Discovery → Configuration

Linking with CDI – in the Primo Content Corner

Central Discovery Index ->
Documentation and
Training -> Documentation
and Training (English) ->
CDI - The Central Discovery
Index

CDI and Linking to Electronic Full Text

◀ Alternative Coverage in CDI | Match and Merge in CDI ▶

[Return to menu](#)

General

Primo results display only the full text links to which that library has access. If you subscribe to the article, book, or other material on a single platform, Primo displays only one full text link. Depending on the content and collection type, CDI uses the most suitable linking method (see [Supported Linking Methods](#)) to provide full text for an item. If you subscribe to the same item on several platforms, by default, CDI uses only one linking method according to priority settings (see [Link Prioritization in the Merged Record](#)) to provide full text links for each platform. You can change the default setting to display multiple links, if available. For more details, see [Display All Links in Full Display for CDI](#).

In addition, the [Quicklinks](#) feature enables users to go to the PDF or HTML version of full text with a single click from the results list.

Supported Linking Methods

Primo supports the following linking methods, which are set at the collection level:

- **OpenURL linking** – Full text linking is handled by the link resolver (Alma/SFX), which allows the library to decide which links to display and their order. Where possible, the link resolver uses a platform-specific document ID to the OpenURL to allow the link resolver to use that ID to link to the full text instead of using metadata to create the link. This ensures the reliability of the links. OpenURL linking is used for approximately 60 percent of the collections indexed in CDI. Collections that use this method include primary journals, general, collections that contain mainstream material such as articles and books that may be available from more than one platform.
- **Link in Record** – In cases where the record is uniquely available from a single platform and/or the link is difficult or impossible to create using the link resolver, the link is stored in the record, which has been provided by the information provider, in CDI. This method is used for approximately 40 percent of the collections. Collections

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New option to activate collections (targets) for search in CDI via DataLoader

The screenshot shows the ExLibris SFX web interface. At the top, the logo 'ExLibris SFX' is displayed. Below it is a navigation menu with links for 'Home', 'KBManager', 'KBTools', 'Statistics', and 'Troubleshooting'. A secondary menu highlights 'DataLoader', 'Export Tool', and 'Collection Tool'. The main content area is titled 'Welcome to DataLoader' and contains a sub-menu with 'Portfolios', 'Update Objects', 'Add/Remove Objects', and 'Target CDI discovery activation'. The 'Target CDI discovery activation' section is active and contains a 'Specify input file' section with a text input field and a 'Browse...' button. Below this is a 'Specify load type' section with three radio button options: 'Activate targets for CDI discovery' (selected), 'Deactivate targets for CDI discovery', and 'Report Mode - Do Not Update the Database'.

Also added and ongoing for CDI

- **Improved consistency of wording** for full-text rights methods for CDI - 'Subscription (Linkresolver)' to 'Subscription (Title Level)'
- **Removed deprecated link to Primo Central** activations from SFXAdmin Center
- **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



Documentation on the KnowledgeCenter

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



SFX enhancements from the past 12 months

Extended Statistics Query 5 to not only group by date but also by source

ExLibris SFX

Home | KBManager | KBTools | **Statistics** | Troubleshooting

Queries | Scheduled Queries List

Query 5 : Number of requests with/without full-text services.

Query parameters

Total by: --Select value--
Source: --Select value--

Dates to query

All time Specific date range

From: -- Month -- -- Day -- -- Year --
To: -- Month -- -- Day -- -- Year --

Filters

Institute
DEFAULT
 Exclude

Formats
 Exclude

Usergroup
 Exclude

Faculty
 Exclude

IP Address
 Exclude

Other additions/changes

KBManager

- Changed contribution feature to create a CRM case for evaluation by the content team
- Extended KBManager embargo validation to allow for embargos exceeding 10 years
- New option to add "Edition" information for local objects of type "Monograph" in SFX KBManager

Third Party upgrades

- **Apache** upgrade to 2.4.54
- **OpenSSL** upgrade to openssl-1.1.1s
- **SOLR** upgrade to Version 8.11.1
- **Java** upgrade to jdk-11.0.16.1-jre
- **Replaced Net::Z3950** module with ZOOM-Perl module

KBART automation

Planned for
September/December:

Taylor & Francis

Already available

- Springer Nature
- Elsevier
- Ovid
- Wiley

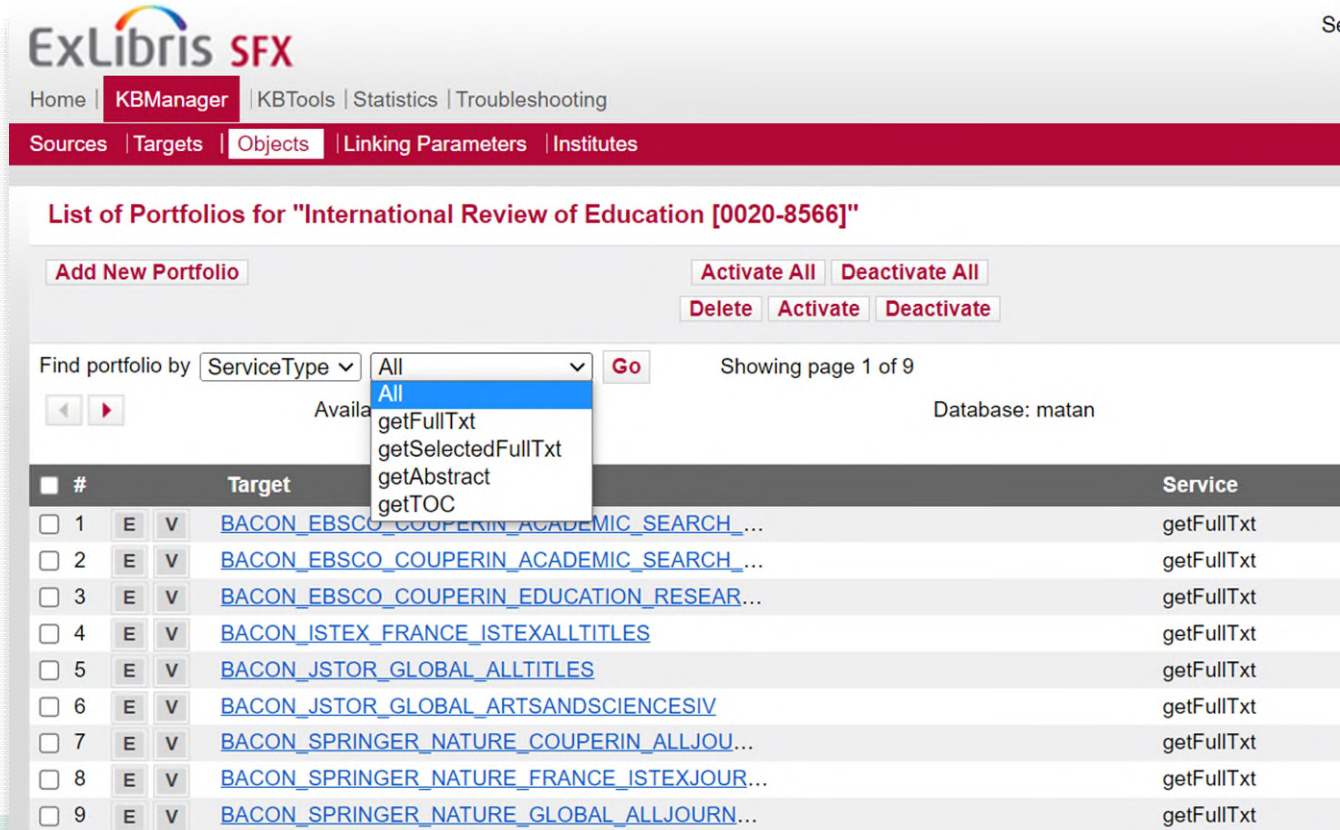
The screenshot shows the ExLibris Knowledge Center website. At the top, there is a navigation bar with the ExLibris logo (Part of Clarivate) on the left and three buttons: 'More Sites', 'System Status', and 'Submit a Case'. Below the navigation bar is a search bar with the placeholder text 'Search under current path' and a magnifying glass icon. To the right of the search bar is a red button labeled 'SFX'. Below the search bar is a breadcrumb trail: '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 is a paragraph of 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.' Below this paragraph is another paragraph: 'SFX currently supports KBART automation for the following providers:' followed by a bulleted list: '• Springer Nature', '• Elsevier', '• Ovid', and '• Wiley'. Below the list is a caption: 'The following figure shows the KBART automation flow with SFX:'. Below the caption is a diagram showing a flow from a 'Content provider' (represented by a blue location pin icon) to an 'Institution/Library' (represented by a green location pin icon).

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

Coming

Improvements to object (title) search with new filters on the ObjectPortfolio list

- For service types (getFullText, getAbstract, getToC)
- Following later: By platform and collection (target)



ExLibris SFX

Home | **KBManager** | KBTools | Statistics | Troubleshooting

Sources | Targets | **Objects** | Linking Parameters | Institutes

List of Portfolios for "International Review of Education [0020-8566]"

[Add New Portfolio](#) [Activate All](#) [Deactivate All](#)
[Delete](#) [Activate](#) [Deactivate](#)

Find portfolio by Showing page 1 of 9
Database: matan

#	Target	Service
<input type="checkbox"/> 1	BACON_EBSCO_COUPERIN_ACADEMIC_SEARCH...	getFullTxt
<input type="checkbox"/> 2	BACON_EBSCO_COUPERIN_ACADEMIC_SEARCH...	getFullTxt
<input type="checkbox"/> 3	BACON_EBSCO_COUPERIN_EDUCATION_RESEAR...	getFullTxt
<input type="checkbox"/> 4	BACON_IJTEX_FRANCE_IJTEXALLTITLES	getFullTxt
<input type="checkbox"/> 5	BACON_JSTOR_GLOBAL_ALLTITLES	getFullTxt
<input type="checkbox"/> 6	BACON_JSTOR_GLOBAL_ARTSANDSCIENCESIV	getFullTxt
<input type="checkbox"/> 7	BACON_SPRINGER_NATURE_COUPERIN_ALLJOU...	getFullTxt
<input type="checkbox"/> 8	BACON_SPRINGER_NATURE_FRANCE_IJTEXJOUR...	getFullTxt
<input type="checkbox"/> 9	BACON_SPRINGER_NATURE_GLOBAL_ALLJOURN...	getFullTxt

Focus areas for SFX

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



Important note: We stop supporting RH6 from the June release

Thank you!

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