

ExLibris[®]
Part of **Clarivate**

IGOLU
International Group of Ex Libris Users

SFX Product Update

Christine Stohn
Senior Director, Product Management

A photograph of the Philadelphia City Hall tower, showing its ornate architecture and clock faces, set against a blue sky. The image is partially obscured by a purple gradient overlay.

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

ExLibris SFX
Home | KBManager | Central Discovery

Server Time: Thursday 13 April 2023 - 08:28:51 | [OpenURL Generator](#) | [Log Off](#)

Configuration

Central Discovery > Configuration

Edit Discovery Configuration

Name*
PC Key*
CustomerID*
Institute Name
Note:
You have **255** characters remaining

CDI linking provider preference

Available	Chosen providers order
1Science ABC-CLIO AFFRIT ARTstor ASM International ASTM International Accessible Archives Adam Matthew Digital Agence Bibliographique de l'Enseignement Supérieur Alexander Street Press	

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

* Required field

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

Home ->
Discovery ->
Configuration

Linking with CDI - in the Primo Content Corner

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, Primo will add 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 a higher 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 publishers and, in 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, Primo will use the link 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 that use this method

- Table of contents
- 1. General
- 2. Supported Linking Methods
- 3. Direct Links
- 4. Link Prioritization in the Merged Record
- 5. Hybrid Collections
- 6. Display All Links in Full Display
 - 6.1. Additional Links in the PNX

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

New Option to Activate Collections (Targets) for Search in CDI via Dataloader



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

DataLoader | Export Tool | Collection Tool

Welcome to DataLoader

Portfolios | Update Objects | Add/Remove Objects | **Target CDI discovery activation**

Specify input file

Specify input file name:

Specify load type

Load Type

- Activate targets for CDI discovery
- Deactivate targets for CDI discovery
- 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

The screenshot shows the ExLibris Knowledge Center interface. At the top left is the ExLibris logo with the text 'Part of Clarivate'. Below the logo 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 » Product Documentation » Version 4.0 » Target Activation for Discovery with Primo and CDI'. The main heading is 'Target Activation for Discovery with Primo and CDI' in a large, dark red font. Below the heading is a paragraph of text: '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.' Below the paragraph is a section titled 'The following articles are available:' followed by a bulleted list of links: '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', and 'Publishing SFX Institutional Holdings to CDI'.

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

The screenshot displays the ExLibris SFX Statistics interface. At the top, the navigation menu includes 'Home | KBManager | KBTools | **Statistics** | Troubleshooting'. Below this, a red header bar contains 'Queries | Scheduled Queries List'. The main content area is titled 'Query 5 : Number of requests with/without full-text services.' and is divided into several sections:

- Query parameters:** This section includes a 'Total by:' dropdown menu currently showing '--Select value--'. Below it, the 'Source:' dropdown menu is open, displaying options: '--Select value--', 'Source', 'Day', 'Month', and 'Year'. The 'Dates to query' section has radio buttons for 'All time', 'Specific date range', and 'Today'. The 'Specific date range' section includes 'From:' and 'To:' fields, each with three dropdown menus for 'Month', 'Day', and 'Year'.
- Filters:** This section contains five filter categories: 'Institute', 'Formats', 'Usergroup', 'Faculty', and 'IP Address'. Each category has a text input field and an 'Exclude' checkbox.
- Output:** This section includes a 'Format:' dropdown menu set to 'HTML' and a 'Delivery:' dropdown menu set to 'Screen'.

Improvements to Object Search

New filters on the ObjectPortfolio list

- **Already released:**
for service types (getFullText, getAbstract, getToC)
- **In September release:**
by platform and collection (target)

The screenshot shows the ExLibris SFX KBManager interface. The main heading is "List of Portfolios for 'International Review of Education [0020-8566]'". Below this, there are buttons for "Add New Portfolio", "Activate All", "Deactivate All", "Delete", "Activate", and "Deactivate". A search bar allows finding portfolios by "ServiceType" (set to "All") and "Go". The interface shows "Showing page 1 of 9" and "Database: matan".

#	Target	Service
1	BACON_EBSCO_COUPERIN_ACADEMIC_SEARCH_...	getFullTxt
2	BACON_EBSCO_COUPERIN_ACADEMIC_SEARCH_...	getFullTxt
3	BACON_EBSCO_COUPERIN_EDUCATION_RESEAR...	getFullTxt
4	BACON_IJSTEX_FRANCE_IJSTEXALLTITLES	getFullTxt
5	BACON_JSTOR_GLOBAL_ALLTITLES	getFullTxt
6	BACON_JSTOR_GLOBAL_ARTSANDSCIENCESIV	getFullTxt
7	BACON_SPRINGER_NATURE_COUPERIN_ALLJOU...	getFullTxt
8	BACON_SPRINGER_NATURE_FRANCE_IJSTEXJOUR...	getFullTxt
9	BACON_SPRINGER_NATURE_GLOBAL_ALLJOURN...	getFullTxt
10	BIBSAM_SPRINGER_NATURE_SPRINGER_COMPAC...	getFullTxt
11	BIBSAM_SPRINGER_COMPACT_2016-2018	getFullTxt

Improvements to Object Search

New filters on the ObjectPortfolio list

- **Already released:**
for service types (getFullText, getAbstract, getToC)
- **In September release:**
by platform and collection (target)

The screenshot shows the ExLibris SFX interface for the 'ObjectPortfolio' list. The page title is 'List of Portfolios for "International Review of Education [0020-8566]"'. It includes navigation links like 'Home', 'KBManager', 'KBTools', 'Statistics', and 'Troubleshooting'. The main navigation bar has 'Sources', 'Targets', 'Objects', 'Linking Parameters', and 'Institutes'. The 'Objects' tab is active. The interface shows a search filter for 'ServiceType' set to 'All' and a search for 'Targets'. The results table has columns for '#', 'Target', 'Service', and 'Threshold'. The table lists 9 portfolios, each with a checkbox, a status indicator (E, V), a target name, a service type (getFullTtxt), and a threshold (Sobj->parsedDate).

#	Target	Service	Threshold
1	BACON_EBS_COUPERIN_ACADEMIC_SEARCH...	getFullTtxt	Sobj->parsedDate
2	BACON_EBS_COUPERIN_ACADEMIC_SEARCH...	getFullTtxt	Sobj->parsedDate
3	BACON_EBS_COUPERIN_EDUCATION_RESEAR...	getFullTtxt	Sobj->parsedDate
4	BACON_ISEX_FRANCE_ISEXALLTITLES	getFullTtxt	Sobj->parsedDate
5	BACON_JSTOR_GLOBAL_ALLTITLES	getFullTtxt	Sobj->parsedDate
6	BACON_JSTOR_GLOBAL_ARTSANDSCIENCESIV	getFullTtxt	Sobj->parsedDate
7	BACON_SPRINGER_NATURE_COUPERIN_ALLJOU...	getFullTtxt	Sobj->parsedDate
8	BACON_SPRINGER_NATURE_FRANCE_ISEXJOUR...	getFullTtxt	Sobj->parsedDate
9	BACON_SPRINGER_NATURE_GLOBAL_ALLJOURN...	getFullTtxt	Sobj->parsedDate

KBART Automation

Part of the September release: Taylor & Francis Books

Already available

- Springer Nature
- Elsevier
- Ovid
- Wiley

The screenshot shows the ExLibris Knowledge Center website. The header includes the ExLibris logo, 'Part of Clarivate', and navigation links for 'More Sites', 'System Status', and 'Submit a Case'. A search bar is present with the text 'Search under current path'. The breadcrumb trail reads: Home » SFX » Knowledge Articles » KBART Automation: Automatic Updates to Your Library Holdings. The article title is 'KBART Automation: Automatic Updates to Your Library Holdings'. The main text explains 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 details the process of localizing the KnowledgeBase and lists supported providers: Springer Nature, Elsevier, Ovid, and Wiley. A diagram below the text shows a flow from a 'Content provider' to an 'Institution/Library'.

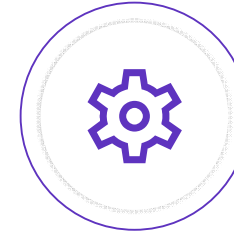
https://knowledge.exlibrisgroup.com/SFX/Knowledge_Articles/KBART_Automation%3A_Automatic_Updates_to_Your_Library_Holdings

Other Additions/Changes



KBManager

- 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
- Added infrastructure to support CDI delta export for SFX consortia.
- Changed SFXAdmin URL to no longer include SID for security reasons



Third Party upgrades

- **MariaDB** upgrade to 10.4.21
- **Apache** upgrade to 2.4.57
- **OpenSSL** upgrade to openssl-1.1.1t
- **SOLR** upgrade to Version 8.11.1
- **Java upgrade** to jdk-11.0.18-jre
- **Replaced Net::Z3950** module with ZOOM-Perl module

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 stopped supporting RH6 from the June release



Thank You!

Christine.Stohn@clarivate.com

About Clarivate

Clarivate is the leading global information services provider. We connect people and organizations to intelligence they can trust to transform their perspective, their work and our world. Our subscription and technology-based solutions are coupled with deep domain expertise and cover the areas of Academia & Government, Life Sciences & Healthcare and Intellectual Property. For more information, please visit [clarivate.com](https://www.clarivate.com)

© 2023 Clarivate

Clarivate and its logo, as well as all other trademarks used herein are trademarks of their respective owners and used under license.