



## Welcome to SFX Web Training Session 1

Valli Hoski Implementation Librarian

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## Objectives

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- Become familiar with the terminology that SFX uses
- Understand the different pieces of data within SFX and how they relate to one another
- Be able to find individual bibliographic items within SFX
- Be able to activate an ejournal package where license all of the content the provider sells for that particular package.
- Be able to input your own institution specific local holdings for an item in SFX



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## Agenda

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- SFX Terminology
- Navigating Through SFX
- Finding A Title in the SFX KnowledgeBase
- Activating Aggregator Targets
- Customizing Thresholds
- Working With Your Collection Data



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# SFX Request: User Experience

The screenshot displays the SFX interface. On the left, a search results panel shows details for the article 'Color vision: Opsins and options' by J. D. Mollon. The main content area shows the article's title, author, and a 'Commentary' section. Two graphs are visible, plotting 'Relative Sensitivity' against wavelength (nm). The top graph shows curves for S (Short wavelength) and L (Long wavelength) cones. The bottom graph shows curves for M (Medium wavelength) and L (Long wavelength) cones. A right-hand sidebar contains various services like 'Email this article to a colleague' and 'Download to citation manager'.

We will see how this experience "happens" in SFX



## SFX Terminology

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## Terminology: Sources

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- Where a user is coming **from** or beginning their search
- Sources **must** be OpenURL-enabled!

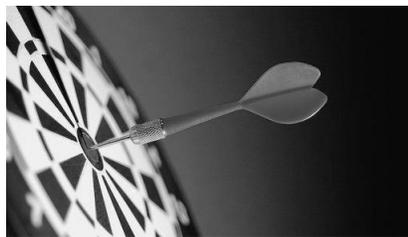


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## Terminology: Targets

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- Where a user "lands"
- Targets **must** have a link to syntax that supports the target service

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## Terminology: Target Services

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- The different link to syntaxes supported by targets



- **getAuthor** – link to an author's record
- **getFullTxt** – link to the full text of a particular article from a Target publisher
- **getHolding** - link to a record in a library catalog
- And many more...

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## Terminology: Objects

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- The bibliographic record for an item (book or journal)
- Contains:
  - Title
  - ISSN/E-ISSN
  - CODEN
  - Abbreviated titles (alternate)
  - Object type
  - Related objects (title or ISSN change)



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## Terminology: Object Portfolios

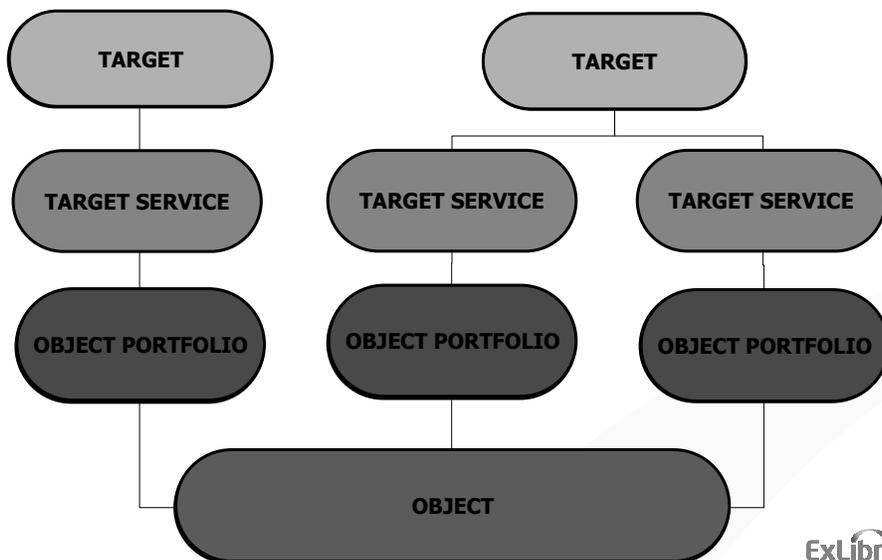
- Connect the Target Services and Objects
- For example, an object portfolio from Cambridge University Press collection is different from an object portfolio in JSTOR Arts & Sciences 1 collection



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## Terminology: How It All Relates



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## Navigating Through SFX

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### Filtering for Targets

Filter Target List:

#	Target
1	AIP_SCITATION (1/21)
<input type="checkbox"/>	<input type="checkbox"/> E <input type="checkbox"/> V AIP_SCITATION_ELECTROCHEMICAL_SOCIETY
2	AMERICAN_CHEMICAL_SOCIETY (2)
<input type="checkbox"/>	<input type="checkbox"/> E <input type="checkbox"/> V AMERICAN_CHEMICAL_SOCIETY_JOURNALS
<input type="checkbox"/>	<input type="checkbox"/> E <input type="checkbox"/> V AMERICAN_CHEMICAL_SOCIETY_LEGACY_ARCHIVE
3	ELECTROCHEMICAL_SOCIETY
<input type="checkbox"/>	<input type="checkbox"/> E <input type="checkbox"/> V ELECTROCHEMICAL_SOCIETY
4	HIGHWIRE_PRESS (2/181)
<input type="checkbox"/>	<input type="checkbox"/> E <input type="checkbox"/> V HIGHWIRE_PRESS_HISTOCHEMICAL_SOCIETY
<input type="checkbox"/>	<input type="checkbox"/> E <input type="checkbox"/> V HIGHWIRE_PRESS_JAPANESE_BIOCHEMICAL_SOCI
5	INGENTA_CONNECT (3/432)
<input type="checkbox"/>	<input type="checkbox"/> E <input type="checkbox"/> V INGENTA_CONNECT_CHEMICAL_SOC_ETHIOPIA

- Find a Target in the Target Section of the Admin Center by using the Filter box located in the upper right hand corner of the screen

## Showing Active or Inactive Targets



#	Target
<input type="checkbox"/> 1	AMAZON
2	+ AMERICAN_CHEMICAL_SOCIETY (1/2)
<input type="checkbox"/> 3	AMERICAN_GEOPHYSICAL_UNION_AGU
4	+ AMERICAN_PHYSICAL_SOCIETY (1/2)
<input type="checkbox"/> 5	APA_PSYCARICLES
6	+ CAMBRIDGE_UNIVERSITY_PRESS_JOURNALS (1/3)
<input type="checkbox"/> 7	DOAJ_DIRECTORY_OPEN_ACCESS_JOURNALS_FREE
<input type="checkbox"/> 8	DOCDEL_RELAIS
9	+ EAST_VIEW (3/32)
10	+ EBSCOHOST (7/90)
11	+ ELSEVIER_SD (1/41)
12	+ GALEGROUP (1/43)
13	+ HIGHWIRE_PRESS (1/181)

- If you want to see just your active Targets use the Show Active toggle located in the upper right hand corner of the screen.



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## Viewing Sub-Targets

<input type="checkbox"/> 87	E	V	DUKE_UNIVERSITY_SCHOOL_OF_LAW_JOURNALS
88		+	EAST_VIEW (32)
<input type="checkbox"/> 88	E	V	EBRARY_ACADEMIC_COMPLETE
90		-	EBSCOHOST (90)
<input type="checkbox"/>	E	V	EBSCOHOST_ACADEMIC_SEARCH_ALUMNI_EDITION
<input type="checkbox"/>	E	V	EBSCOHOST_ACADEMIC_SEARCH_COMPLETE
<input type="checkbox"/>	E	V	EBSCOHOST_ACADEMIC_SEARCH_ELITE
<input type="checkbox"/>	E	V	EBSCOHOST_ACADEMIC_SEARCH_PREMIER
<input type="checkbox"/>	E	V	EBSCOHOST_ACADEMIC_SOURCE_PREMIER
<input type="checkbox"/>	E	V	EBSCOHOST_ADVANCED_PLACEMENT_SOURCE
<input type="checkbox"/>	E	V	EBSCOHOST_ALT_HEALTHWATCH
<input type="checkbox"/>	E	V	EBSCOHOST_AMERICAN_HUMANITIES_INDEX
<input type="checkbox"/>	E	V	EBSCOHOST_APPLIED_SCIENCE_AND_TECHNOLOGY
<input type="checkbox"/>	E	V	EBSCOHOST_ART_INDEX

- If a provider has multiple targets available you'll see a '+' button next to it.
- To view all of the sub-targets for that provider click the '+' button.



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## Demo

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### **Navigating through the SFX Targets Section**

Let's take a look together.

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### **Finding A Title in the SFX KnowledgeBase**

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## Searching For Objects

Search Objects

ISSN/eISSN:

ISBN/eISBN:

Title:

CODEN:

Category: -- Choose Category --

Subcategory: -- Choose Subcategory --

Publisher:

Place of Publication:

Local:

Object ID:

LCCN:

Search Object

- Search objects allows you to find one particular title at a time.
- You can find a title by searching for:
  - ISSN/e-ISSN
  - ISBN/e-ISBN
  - Title
  - Other fields

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## The Object Record

- Information for object records is gathered from CONSER and other sources
- Information in the object record includes:
  - Object ID
  - Title
  - ISSN
  - eISSN
  - Related Titles

Found 1 results for the following query: Title = 'bee culture'

1 110978977287240 Object Portfolio

Title Bee culture

ISSN 1071-2190

eISSN 1531-4000

Imprint Medina, Ohio : A.I. Root Co.

@category Agriculture Sciences - Apiculture

@category Agriculture Sciences - Food Science and Technology

@category Engineering - Food Science and Technology

@category Life Sciences - Botany

Continues [Beekeeping in bee culture \[0017-114X\]](#)

Object Type JOURNAL

Language en

Peer Reviewed NO

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## Demo

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### Finding Objects in the SFX Knowledgebase

Let's take a look together.

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## Activating Aggregator Targets

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## Activating an Aggregator: The Three Step Process

Available: 1 targets Database: roslyn Filter Target List: proquest Go

#	Target	Threshold	Modified	Active	Action
1	PROQUEST (32)				
<input type="checkbox"/>	PROQUEST_5000		2007/04/03	N	C
<input type="checkbox"/>	PROQUEST_5000_INTERNATIONAL		2007/04/03	N	C
<input type="checkbox"/>	PROQUEST_ABI_INFORM_ARCHIVE		2007/04/03	N	C
<input type="checkbox"/>	PROQUEST_ABI_INFORM_COMPLETE		2008/02/21	N	C
<input type="checkbox"/>	PROQUEST_ABI_INFORM_DATELINE		2007/04/03	N	C
<input type="checkbox"/>	PROQUEST_ABI_INFORM_GLOBAL		2007/08/28	N	C

- **Step 1: Activate the Target**
  - Click the 'N' button located next to the target name
  - The text will turn black and the 'N' button will become a yellow 'Y' button.

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## Activating an Aggregator: The Three Step Process

Available: 1 services Database: roslyn Target: PROQUEST\_ABI\_INFORM\_COMPLETE [Back to Target](#)

#	Service	Parser	Threshold	Modified	Active	Action
1	getFullTxt	PROQUEST_OPEN		2008/02/21	Y	C

- **Step 2: Activate the Target Service**
  - Click the 'N' button located next to service you want to expose your users to.
  - The text will turn black and the 'N' button will become a yellow 'Y' button.

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## Activating an Aggregator: The Three Step Process

List of Portfolios for PROQUEST\_ABI\_INFORM\_COMPLETE-getFullTxt

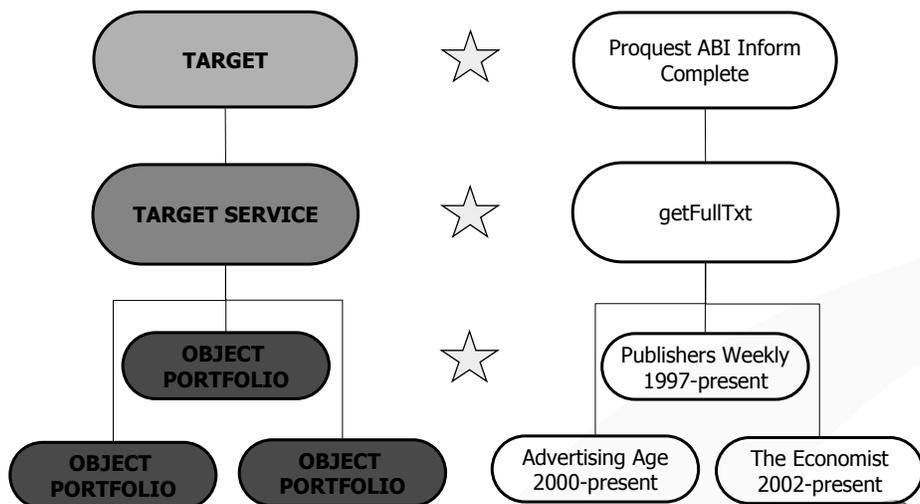
#	Target	Service Object	Title	Threshold	Mod.	Act.	ActionTest	SFX
1	PROQUEST_ABI_INFORM_COMPLETE	getFullTxt_1000000000025251	Smart Business Ak...	Obj->parsedDate(>=":2003,undef,unde...	2008/02/21	Y	C	
2	PROQUEST_ABI_INFORM_COMPLETE	getFullTxt_1000000000025404	Agri Industry Eu...	Obj->parsedDate(>=":1998,undef,unde...	2008/02/21	Y	C	
3	PROQUEST_ABI_INFORM_COMPLETE	getFullTxt_1000000000025414	BBC Monitoring Fo...	Obj->parsedDate(>=":1998,undef,unde...	2008/02/21	Y	C	
4	PROQUEST_ABI_INFORM_COMPLETE	getFullTxt_1000000000025423	Enterprise The Sa...	Obj->parsedDate(>=":1992,undef,unde...	2008/02/21	Y	C	
5	PROQUEST_ABI_INFORM_COMPLETE	getFullTxt_1000000000025425	Euronet The	Obj->parsedDate(>=":2001,undef,unde...	2008/02/21	Y	C	

- **Step 3: Activate all the Object Portfolios**
  - Click the 'Activate All' button located at the top of the Object Portfolio screen.
  - All the text will turn black and the 'N' buttons will become yellow 'Y' buttons.

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## Activating an Aggregator: The Three Step Process



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## Demo

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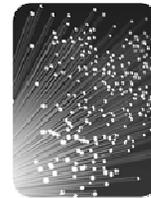
### Activating Aggregator Targets

Let's take a look together.

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## Understanding Different Types of Thresholds

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## What is a Threshold?

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- A threshold is a rule that determines whether or not something can appear on the SFX Menu
- Examples:
  1. Publishers Weekly is available from 1997 to the present in EBSCOHost Academic Search Elite. Therefore if you're requesting an article in Publishers Weekly it must be between those two dates in order for this target to appear on the SFX Menu.
  2. To do a search in the library catalog you need a book title **or** a journal title **or** an ISSN **or** an ISBN. Therefore one of these pieces of information must be present in order for this target to appear on the SFX Menu.



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## Two Categories of Thresholds

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- |  |  |
|--|--|
| <ul style="list-style-type: none"><li>• <b>Global Thresholds</b><ul style="list-style-type: none"><li>• Provided to Ex Libris by database and e-journal providers</li><li>• Maintained and updated by Ex Libris.</li></ul></li></ul> | <ul style="list-style-type: none"><li>• <b>Local Thresholds</b><ul style="list-style-type: none"><li>• Reflects a library's access to a particular resource</li><li>• Created and maintained by the library.</li></ul></li></ul> |
|--|--|



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## Different Types of Thresholds

- Date Threshold
  - `$obj->parsedDate(">=",1997,undef,undef)`
  - `$obj->parsedDate(">=",1997,12,1)`
  - `$obj->parsedDate(">=",1989,1,1) && $obj->parsedDate("<=",2005,17,4)`
- Rolling Date Threshold
  - `$obj->timediff('<','3m')`
  - `$obj->timediff('>','1y')`
- Require an Attribute
  - `$obj->need('ISBN')`
  - `$obj->need('@authLast')`

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## Creating a Local Threshold

Compose Threshold

Use  global AND local thresholds  
 global OR local thresholds  
 ONLY local thresholds

Genre  Any Type  Document  Patent  
 Article  Dissertation  Preprint  
 Book  Issue  Proceeding  
 Book Item  Journal  Report  
 Conference

Needs   
(Optional) Under the condition:   
List (multi-valued) attributes:

First Publication Year  Volume  Issue

Last Publication Year  Volume  Issue

Publication Date  1 month

plugin

IP Range   
(e.g. 157.193.\*.\*)

Submit

Threshold (local)

Compose Clear

- Edit the object portfolio record
- Click the compose button at the bottom of the Local Threshold box
- Enter your information
- Click Submit

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## Demo

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### Creating a Local Threshold

Let's take a look together.

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## Working With Your Collection Data

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## Understanding Your Collection Data

	A	H
1	<b>Targets where you will use the 'Activate All' button:</b>	
2	COLUMBIA_INTERNATIONAL_AFFAIRS_ONLINE_CI	
3	CSA_SAGE_COMMUNICATION_STUDIES	
4	CSA_SAGE_CRIMINOLOGY	
5	CSA_SAGE_EDUCATION	
6	CSA_SAGE_HEALTH_SCIENCES	
7	CSA_SAGE_MANAGEMENT_AND_ORGANIZATION_STU	
8	CSA_SAGE_MATERIALS_SCIENCE	
9	CSA_SAGE_POLITICAL_SCIENCE	
10	CSA_SAGE_PSYCHOLOGY	
11	CSA_SAGE_SOCIOLOGY	
12	CSA_SAGE_URBAN_STUDIES_AND_PLANNING	
13	EBSCOHOST_ACADEMIC_SEARCH_PREMIER	
14	EBSCOHOST_BUSINESS_SOURCE_COMPLETE	
15	EBSCOHOST_CINAHL_WITH_FULL_TEXT	
16	EBSCOHOST_INTER_BIBLIOGRAPHY_THEATRE_DAN	
17	EBSCOHOST_INTER_SECURITY_COUNTER_TERRORI	
18	EBSCOHOST_PSYCARTICLES	
19	FACTIVA	

- The Data Workbook helps guide to you in
  - Activating the targets
  - Customizing targets, thresholds and more based on your library's collections
- The Overview tab is broken up into three sections
  - Aggregator Targets
  - Suggested Free Targets
  - Selective Targets



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## Initial Tasks For Activating Targets

- Activate the **Aggregator Targets** (and their associated object portfolios) listed in the Overview Tab
- Evaluate **Free Targets** and activate those Targets you are interested in.
- Identify questions about your data, targets, objects and thresholds for resolution.

	A	H
1	<b>Targets where you will use the 'Activate All' button:</b>	
2	COLUMBIA_INTERNATIONAL_AFFAIRS_ONLINE_CI	
3	CSA_SAGE_COMMUNICATION_STUDIES	
4	CSA_SAGE_CRIMINOLOGY	
5	CSA_SAGE_EDUCATION	
6	CSA_SAGE_HEALTH_SCIENCES	
7	CSA_SAGE_MANAGEMENT_AND_ORGANIZATION_STU	
8	CSA_SAGE_MATERIALS_SCIENCE	
9	CSA_SAGE_POLITICAL_SCIENCE	
10	CSA_SAGE_PSYCHOLOGY	
11	CSA_SAGE_SOCIOLOGY	
12	CSA_SAGE_URBAN_STUDIES_AND_PLANNING	
13	EBSCOHOST_ACADEMIC_SEARCH_PREMIER	
14	EBSCOHOST_BUSINESS_SOURCE_COMPLETE	
15	EBSCOHOST_CINAHL_WITH_FULL_TEXT	
16	EBSCOHOST_INTER_BIBLIOGRAPHY_THEATRE_DAN	
17	EBSCOHOST_INTER_SECURITY_COUNTER_TERRORI	
18	EBSCOHOST_PSYCARTICLES	
19	FACTIVA	



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## Practice: Activating Aggregator Targets

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### Exercise 1.1 – Activating Aggregator Targets

Using the knowledge you just learned and the steps outlined in the SFX Exercises booklet, activate aggregator targets within your test SFX instance.

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## Practice: Finding A Title in the SFX KnowledgeBase

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### Exercise 1.2 – Find One Object at a Time in SFX using the ISSN or ISBN

Using the knowledge you just learned and the steps outlined in the SFX Exercises booklet, try finding an object record by ISSN or ISBN.



### Exercise 1.3 – Find One Object at a Time in SFX using the Title

Using the knowledge you just learned and the steps outlined in the SFX Exercises booklet, try finding an object record by Title.

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## Practice: Understanding Different Types of Thresholds

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### Exercise 1.4 – Add Thresholds Using the Threshold Composer

Using the knowledge you just learned and the steps outlined in the SFX Exercises booklet, create your own local thresholds.

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[www.exlibrisgroup.com/sfx.htm](http://www.exlibrisgroup.com/sfx.htm)

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