



# General User's Guide

Version 4

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## Updates to This Guide

This guide is being reissued due to the following changes:

- SFX now uses the following color codes for KBManager:
  - green for activation (gray is not active)
  - yellow for localization (localization and institute settings)
  - orange for discovery indication (search activation etc)

In support of this:

- The checkmark sign to indicate activation in Target, Target service and portfolio screens was changed from Gray/Yellow to Gray/Green.
- The gray S button changes to green (background) if at least one getFullTxt service has been activated for either DEFAULT or Institute/Group.
- The gray P button changes to green (background) if at least one getFullTxt portfolio has been activated for either DEFAULT or Institute/Group.
- The icons for local/global/localized were updated.

For more information, see **KBManager** on page 35.

- The **Updating Portfolios** on page 169 section was added.



# Part I

---

## Introduction

This part contains the following:

- **Section 1: Introducing SFX** on page 17
- **Section 2: SFX Admin Center** on page 27





# 1

## Introducing SFX

This section includes:

- Overview of the Main SFX Components on page 17
- SFX Database Tables on page 18
- Role of the SFX Database on page 22
- Thresholds on page 24

## Overview of the Main SFX Components

This section describes the main components of SFX.

The following figure displays three SFX windows:

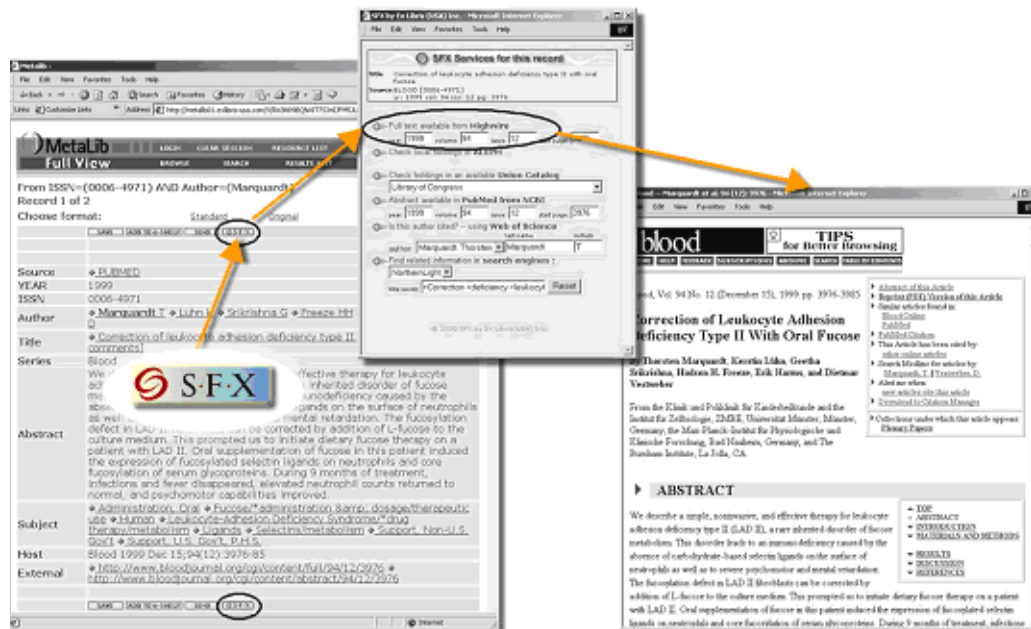


Figure 1: SFX Windows

From left to right, these windows are as follows:

- **Source** window – the database from which you begin searching for an object. In the above example, the database is PubMed, accessed through MetaLib. If you click the **SFX** button in the top bar of the record, the SFX menu opens.
- **SFX menu** window – contains a list of available services (for example, full-text), checks the OPAC for local print holdings, and offers an ILL service to order the object. When you click one of the services, the Target window opens.
- **Target** window – the database that contains the object for which you are searching. In the above example, the user requests a full-text service, so the Target window displays the HighWire full-text version corresponding to the original abstract record. Each of the HighWire full-text journals is called an object. Information about these objects is essential to deliver correct and appropriate services.

---

**NOTE:**

Click the **Cookie Policy** link at the bottom of the SFX Menu to display a description of the SFX Privacy Policy and how Ex Libris uses cookies.

---

## SFX Database Tables

This section includes the following:

- **SFX Database Overview** on page 18
- **Connecting Sources and Targets** on page 20
- **Connecting Target Services and Objects** on page 21

### SFX Database Overview

The key SFX components are also the names of three sets of database tables needed to manage the SFX database. For each, there is a KnowledgeBase (KB) table that contains global information and two local (LCL) tables that contain activation information and local overrides of the global information.

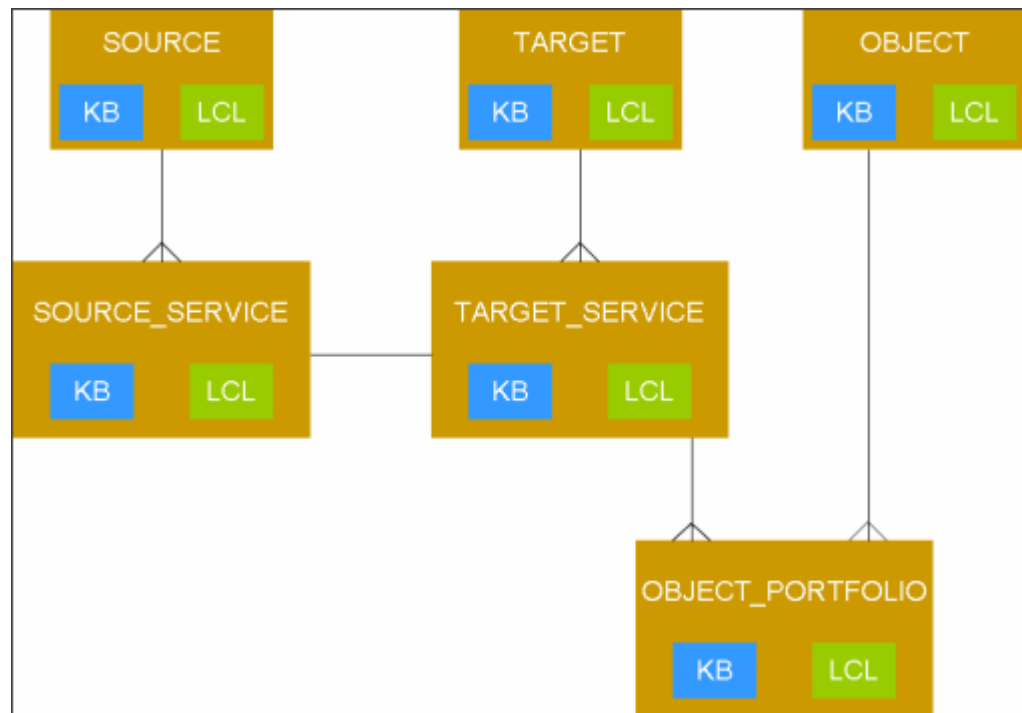


Figure 2: SFX Database Tables

The following is a brief overview of the different database tables:

- **KB\_SOURCES** – contains information about sources from which a request for objects and services originates. These sources can be, for example, A&I databases, full-text repositories, preprint archives, library OPACs, electronic table of contents databases, and local data repositories.
- **KB\_TARGETS** – contains information about the vendors of services. Some examples of targets are full-text providers, publishers, and databases.
- **KB\_SOURCE SERVICES** – contains information about available services. The **SOURCE** and **TARGET** tables are connected through the **SOURCE\_SERVICE** and **TARGET\_SERVICE** tables.
- **KB\_OBJECTS** – contains objects and information about objects. The following two types of objects are defined by Ex Libris in the SFX database:
  - serials
  - monographs
- **KB\_OBJECT\_PORTFOLIOS** – contains information that connects target services and objects. For example, the **KB\_OBJECT\_PORFOLIOS** table indicates which journals are available from the Blackwell Synergy full-text collection.

## Connecting Sources and Targets

The SOURCE and TARGET tables are connected through the SERVICE tables:

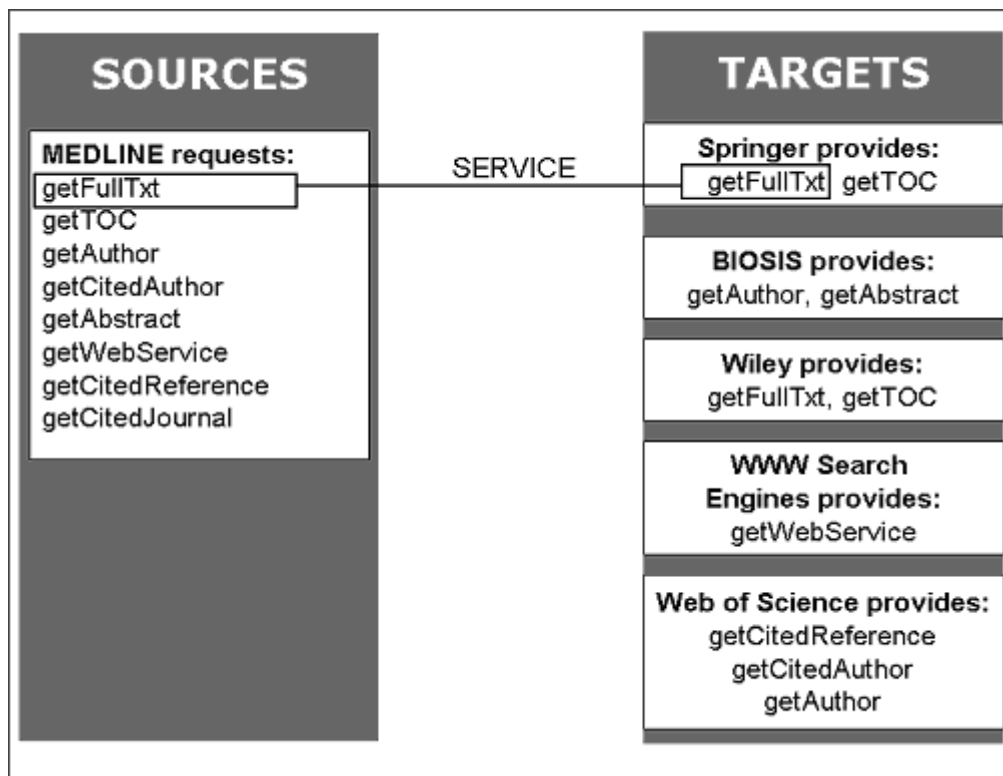


Figure 3: Connecting Sources and Targets

For example: Your institution has access to a Medline (SilverPlatter) database. The Medline database is defined as a source in your SFX database. One of the services defined for the Medline source is a getFulltxt service.

You also have access to all Springer full-text journals via the Springer LINK Web site. Springer is defined as a target in your SFX database. One of the services defined for this target is a getFulltxt service.

In the SFX database, a connection is made between Medline and Springer, as in the following figure:

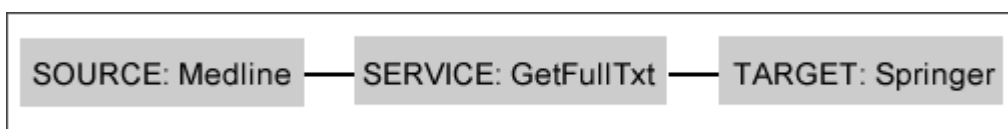


Figure 4: Connection Between Medline and Springer

As a result, a full-text service to Springer appears in the SFX menu if you start your search in the Medline database. However, the full-text service is offered only if:

- The journal for which you requested an SFX service is part of the Springer full-text collection.
- This particular article is available online, and your institution has access to it (for example, an electronic subscription).

## Connecting Target Services and Objects

The `KB_OBJECT_PORTFOLIOS` table stores information that connects target services and objects.

For example, the following figure indicates which journals are available from the Springer LINK full-text collection:

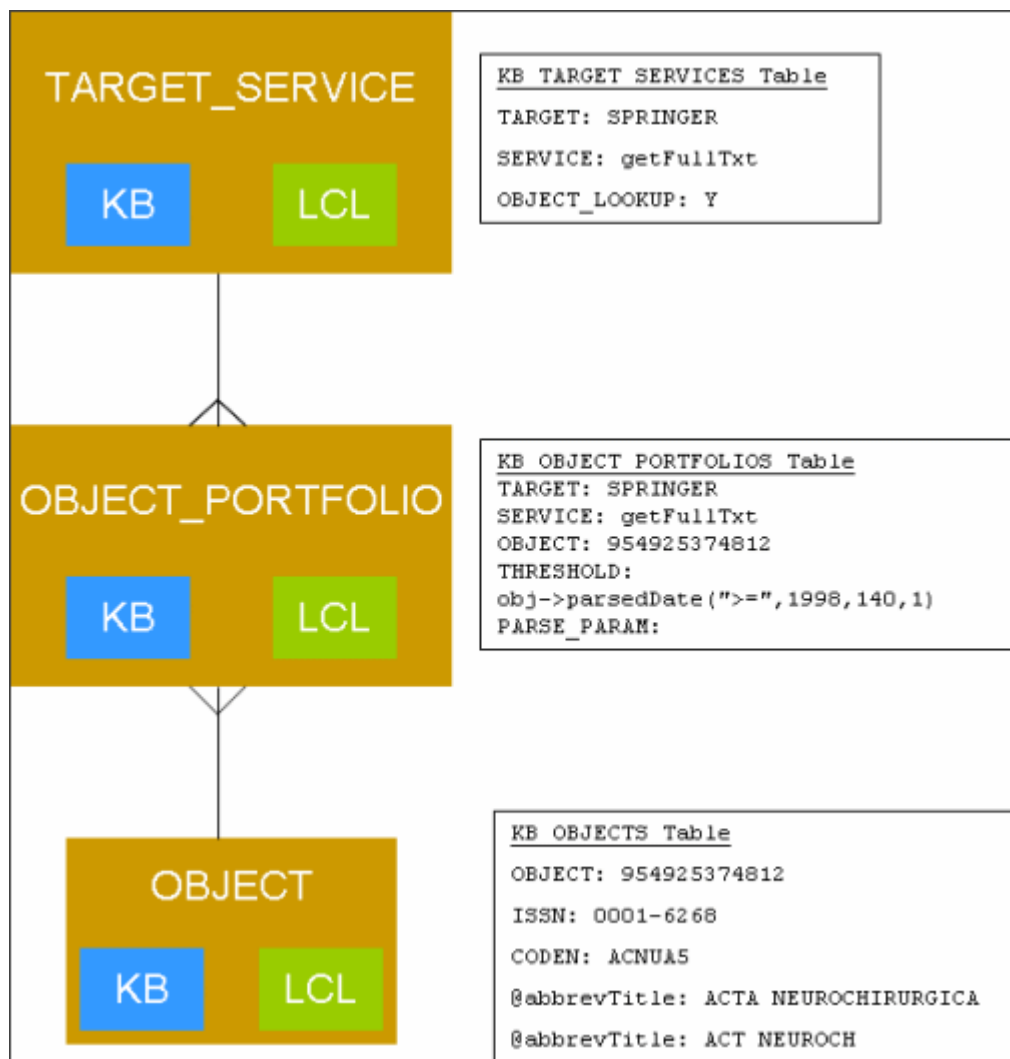


Figure 5: Springer LINK Full-Text

## Role of the SFX Database

When a source transfers its metadata via an OpenURL, SFX builds a ContextObject. This SFX ContextObject includes all metadata the source sends via the OpenURL and any additional data SFX retrieves from the SFX database (a process called augmentation) or via an external lookup (a process called fetch). SFX uses the ContextObject to find services in the SFX database. To provide appropriate SFX services, it is important to build a ContextObject with correct and sufficient metadata. This is the reason for the augmentation and fetch processes.

The following are examples of the types of data that SFX adds to the ContextObject during augmentation:

- Author
- Title
- Category

The SFX database controls the intermediate steps needed to link a source to a target.

In the SFX database:

- The `KB_SOURCES` table is the starting point of an SFX request. The source parser interprets the metadata sent by the source and transforms it into an SFX request.
- Thresholds define the information required to create each link in the SFX menu within the SFX database. These thresholds examine the SFX request, and based on the request's contents, the SFX menu offers services.
- The `KB_TARGETS` and `KB_TARGET_SERVICES` tables contain information about targets.

The following figure describes the role of the SFX database:

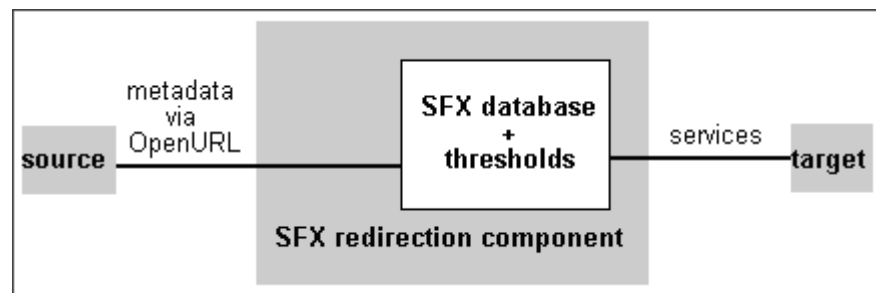


Figure 6: Flow from Source to Target

The following figure describes the SFX flow:

## The Flow of an SFX Request

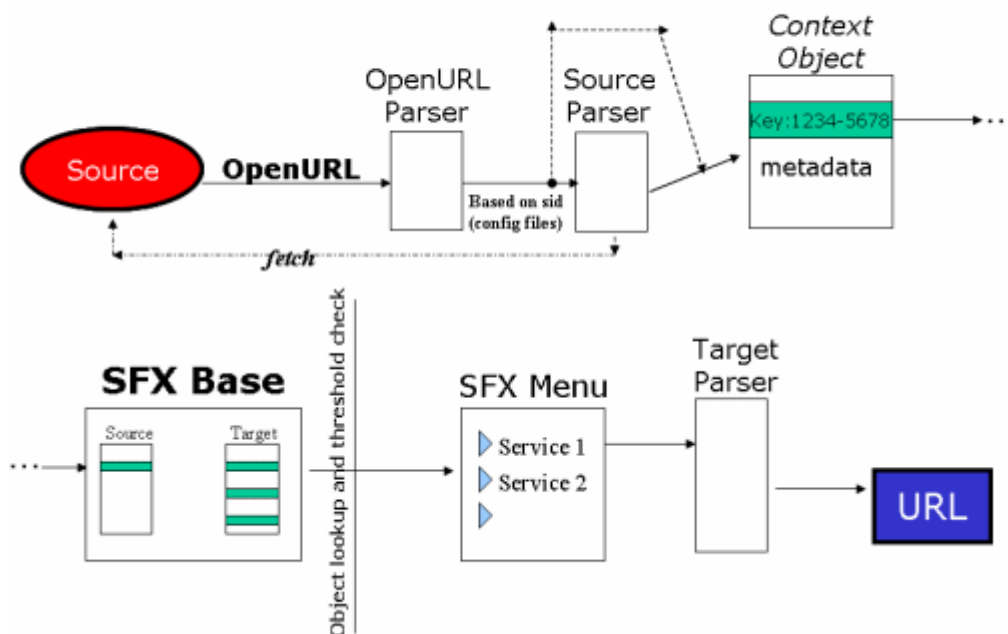


Figure 7: SFX Flow

## Thresholds

This section includes the following:

- [Thresholds Overview](#) on page 24
- [Thresholds in the Database Tables](#) on page 25
- [Object Lookup](#) on page 25

### Thresholds Overview

The `KB_TARGETS`, `KB_TARGET_SERVICES`, `OBJECT_PORFOLIOS`, and `LCL_LINKING_INFO` tables contain the `THRESHOLD` field that subjects the SFX request to specific conditions. If the SFX request matches all thresholds connected to a service, SFX displays the service in the SFX menu.



## Thresholds in the Database Tables

Thresholds are set in the following tables:

Table 1. Thresholds

Table	Description
KB_TARGETS	Conditions on linking to a vendor – for example, linking to a publisher is possible only when the SFX request contains an ISSN number.
KB_TARGET_SERVICES	Conditions on linking to a service of a vendor – for example, linking to full-text at a publisher is possible only when the SFX request contains an ISSN number.
KB_OBJECT_PORTFOLIOS	Conditions on linking to an object – for example, the journal <i>Animal Behavior</i> , part of the getFullTxt service of ScienceDirect, is available only from 1993 volume 45 issue 1 and later.

For more detailed information on thresholds, see [Thresholds](#) on page 115.

## Object Lookup

Each target service can also have a special threshold named OBJECT\_LOOKUP. The condition of this threshold is fulfilled if the SFX request contains an object that is part of an object portfolio belonging to the service.

The OBJECT\_LOOKUP threshold is used when objects need to be attached to a particular target service. This means that the SFX menu displays the target service only if the information you start from (for example, a particular journal) is part of the object portfolio of that particular target service.

Object lookup is mainly used for getFulltxt target services. With object lookup, SFX offers a particular full-text service only if the journal for which you request services is available electronically from a particular target service.

Object lookup is not used when objects do not need to be connected to a particular target service. In this case, the SFX menu displays the target service regardless of the object with which you start. This is used for more general, search-oriented target services, such as a getHolding or getWebSearch services.

The OBJECT\_LOOKUP threshold can be set to Yes or No in the KB\_TARGET\_SERVICES table and a local override exists in the LCL\_SERVICE\_LINKING\_INFO table. For more information, see [KBManager](#) on page 35.



# 2

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## SFX Admin Center

This section includes:

- [Overview of the SFX Admin Center](#) on page 27
- [Getting Started](#) on page 28

### Overview of the SFX Admin Center

The SFX Admin Center is a Web-based administrative tool that you can use to manage your local SFX server. The SFX Admin Center provides a common interface for all aspects of SFX administration. This includes the following:

- Data Management
  - KBManager
  - KBTools
  - Statistics
  - Troubleshooting
- Setup & Administration
  - Additional KB Tools
  - Configuration
  - KUpdate
  - Administration
  - Services
  - bX

## Getting Started

This section describes how to log on to the SFX Admin Center and work with the SFX Admin Center menu. It includes the following:

- [Logging In to the SFX Admin Center](#) on page 28
- [SFX Admin Center Menu Layout](#) on page 29

### Logging In to the SFX Admin Center

This section describes how to log on to the SFX Admin Center

#### To log on to the SFX Admin Center:

- 1 In your browser's address bar, enter the following URL:

[http://server\\_name:port/sfxadmin/instance\\_name/](http://server_name:port/sfxadmin/instance_name/)

The login window of the SFX Admin Center opens:

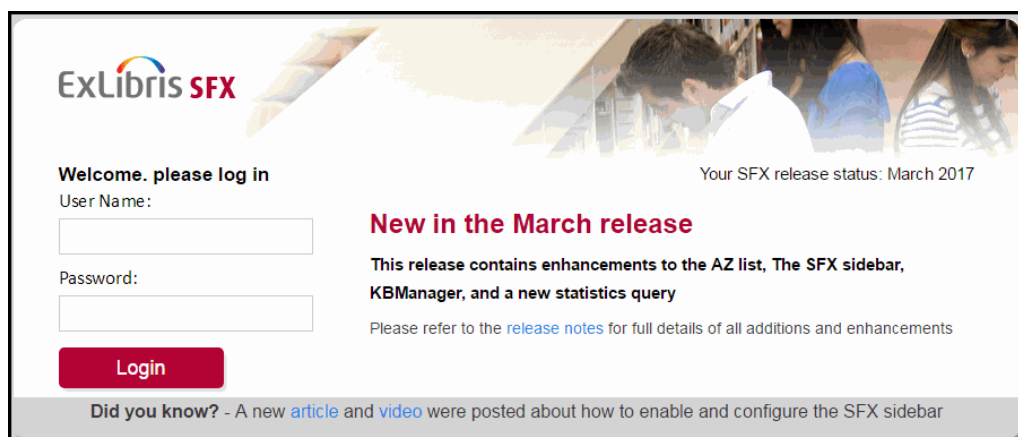


Figure 8: SFX Admin Center Login

The release that your server is using is displayed, as well as the highlights of the last release. You can click **Release Notes** to display the list of release notes.

- 2 Enter the correct user name and password and click **Login** to connect to your local SFX database.

Error messages are displayed when the SFX database is not accessible or when Javascript or cookies are not activated.

If you enter an incorrect password 5 times within 5 minutes, you are asked to enter a captcha to continue. For information on password configuration, see the Password Configuration section of the SFX System Administration Guide.

The SFX Admin Center main menu opens:

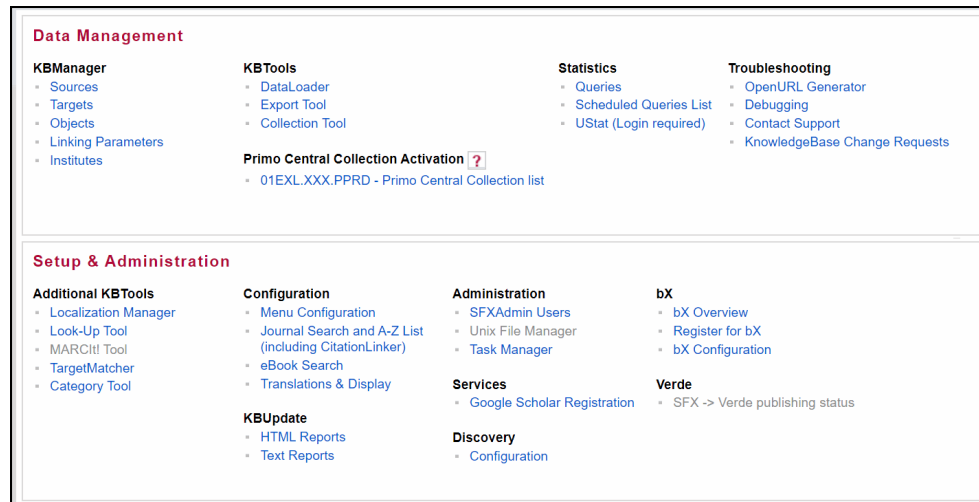


Figure 9: SFX Admin Center Main Menu

### IMPORTANT:

The SFX Admin Center requires that Javascript be enabled and that the browser be set to accept cookies.

## SFX Admin Center Menu Layout

Once connected to the SFX database, the SFX Admin Center menu provides access to the following modules (See [Figure 9](#) above):

- **Data Management**
  - **KBManager** – Tools to manage the SFX KnowledgeBase on a small scale
  - **KBTools** – Tools to manage the SFX KnowledgeBase on a large scale
  - **Central Discovery Collection Activation** – After you configure a Central Discovery key, a link appears that enables you to display the Central Discovery Collection List. (If CDI is not configured, a link for Primo Central Collection Activation appears instead.)
  - **Statistics** – A tool that allows you to run a range of statistical queries
  - **Troubleshooting** – A tool that allows you to test the setup of the SFX KnowledgeBase and to debug problems
- **Setup & Administration**
  - **Additional KB Tools** – Additional tools to manage the SFX KnowledgeBase
  - **Configuration** – Tools to configure the A-Z List and SFX menu

- **KBUpdate** – Reports on KB updates
- **Administration** – Tools for managing SFX Admin Center users and UNIX files
- **Services** – Google Scholar registration
- **Central Discovery** – Central Discovery Configuration. (If CDI is not configured, a link to Primo Central configuration appears instead.)
- **bX** – A tool to generate recommendations based on article usage

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**NOTE:**

Features to which you do not have access are grayed out.

---

At the top of every page of the SFX Admin Center, a menu bar appears that indicates your location. You can use the menu bar to navigate between the different tools of the Admin Center.

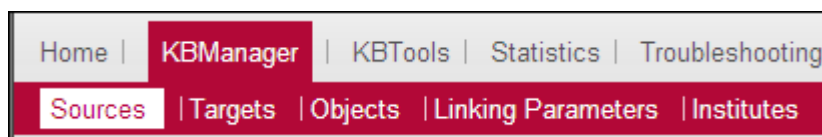


Figure 10: Menu Bar

## Lite Administration Interface

When accessing the SFX Admin Center as a Lite Administration user, you have access to the SFX Admin Lite interface, instead of the full set of administration options. The SFX Admin Lite can be used to perform the following basic administrative tasks:

- Search for objects.
- Activate and deactivate object portfolios with one-click activation (activating or deactivating targets, target services, and object portfolios simultaneously).
- Edit simple thresholds in a user-friendly manner (not Perl statements).
- Run statistic reports.

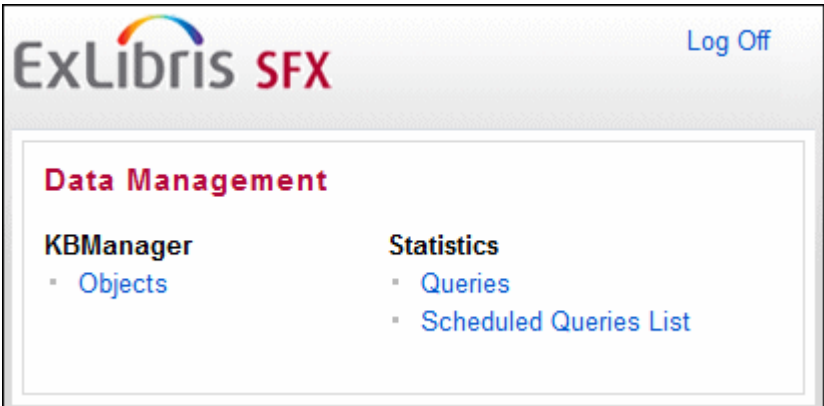


Figure 11: SFX Admin Lite

For more information on the SFX Admin Lite, see [SFX Admin Lite](#) on page 148.





# Part II

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## Data Management

This part contains the following sections:

- **Section 3:** **KBManager** on page 35
- **Section 4:** **KB Tools** on page 159
- **Section 5:** **Statistics** on page 259
- **Section 6:** **Troubleshooting** on page 271



# 3

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## KBManager

This section includes:

- **KBManager Overview** on page 35
- **Sources** on page 36
- **Targets** on page 47
- **Objects** on page 88
- **Linking Parameters** on page 109
- **Institutes** on page 114
- **Thresholds** on page 115
- **Using KBManager: Examples and Scenarios** on page 139
- **Character Set Values Used in the Target char\_set Field** on page 147
- **SFX Admin Lite** on page 148

## KBManager Overview

KBManager is the administrative tool used to manage the information in the SFX database. With KBManager, you can manage the database tables and perform the following tasks:

- View, add, edit, or delete sources, targets, and target services in the SFX database
- Search for objects and view objects connected to target services
- Define which sources link to which target services
- Set or change thresholds
- Change activation status by activating and deactivating sources, targets, target services, and object portfolios

- Configure information related to user authentication that is used to link to certain targets
- Change CDI search activation status by activating and deactivating targets for discovery (for customers using the Primo discovery system and CDI).

KBManager contains the following features:

- **Sources** – Configure sources
- **Targets** – Configure targets, target services, and object portfolios
- **Objects** – Find object and object portfolio information in the SFX database
- **Linking Parameters** – Configure information related to user authentication that is necessary for certain targets
- **Institutes** – Add and configure institute settings

## Sources

This section includes the following:

- **Sources Overview** on page 36
- **List of Sources** on page 37
- **Editing Sources** on page 38
- **Viewing Sources** on page 41
- **Adding Sources** on page 42
- **Deleting Sources** on page 42
- **Source Services** on page 43

### Sources Overview

The List of Sources contains information about resources that are the starting points of links—for example, an A & I database, a reference in a journal article, or an OPAC record. The most important field in the source list is the **Source ID**. This field contains information that the SFX program needs about the origin of the SFX request. (For more information, refer to the **Local Source Configuration** section of the *SFX Advanced User's Guide*.) **Source ID** is a required field. It is not possible to add a new source without specifying the source ID. Each source is connected to a number of source services.

To display a list of sources, from the KBManager section of the Data Management area, click **Sources**. The List of Sources window opens:

The screenshot shows the 'List of Sources' page in KBManager. At the top, there is a navigation bar with 'Sources' selected. Below this, there is a 'List of Sources' section with a table of 10 sources. The table has columns for '#', 'Source', 'Source ID', 'Modified', and 'Action'. The sources listed are: ABC\_CLIO, AMS\_MATHSCINET, ANNUAL\_REVIEWS, ARXIV, BIOMED\_CENTRAL, BOWKER\_ULRICHSWEB, BREPOLS, BX\_HOTARTICLE, CAMBRIDGE\_SCIENTIFIC\_ABSTRACTS, and CHADWYCK\_HEALEY. Below the table, there is a navigation bar with 'Add New Source', 'Delete', and 'Filter Source List' options. The 'Filter Source List' dropdown is set to '20 services per page'. The 'Available' count is 66 sources and the 'Database' is sst1\_4.

#	Source	Source ID	Modified	Action
1	ABC_CLIO	ABC	2010/02/04	c
2	AMS_MATHSCINET	AMS	2010/02/04	c
3	ANNUAL_REVIEWS	ANNUALREVIEWS	2010/02/04	c
4	ARXIV	ARXIV	2010/02/04	c
5	BIOMED_CENTRAL	BIOMED	2010/02/04	c
6	BOWKER_ULRICHSWEB	ULRICHS	2010/02/04	c
7	BREPOLS	BREPOLS	2010/02/04	c
8	BX_HOTARTICLE	BX_HOTARTICLE	2012/03/29	c
9	CAMBRIDGE_SCIENTIFIC_ABSTRACTS	CSA	2010/02/04	c
10	CHADWYCK_HEALEY	CHADWYCK_HEALEY	2010/02/04	c

Figure 12: List of Sources

## List of Sources

The work area displays a menu bar, a navigation bar, and a list of all available sources.

The screenshot shows the 'Sources Navigation Bar' with the following elements: 'Add New Source' button, 'Delete' button, 'Filter Source List: Show 20 services per page' dropdown, 'Available: 66 sources' text, 'Database: sst1\_4' text, 'Filter Source List: [input field] Go' button.

Figure 13: Sources Navigation Bar

The Navigation bar contains the following sections:

- **Add New Source** – Click to add a new source.
- **Delete** – Click to delete selected sources. Only locally created sources can be deleted, not sources that are part of the global KnowledgeBase.
- **Filter Source List** – Select the number of sources to be displayed per page
- **Available** – The number of sources in the table
- **Database** – The name of the database in which you are currently working






- **Filter Source List** – Type the name of the source you want to view. It is possible to use one or more of the following characters (according to regular expression syntax in Perl) when filtering:

Table 2. Filter Characters

Character	Description
^<search_term>	Search term starting with
<search_term>\$	Search term ending with
<search_term>.	Search term followed by at least one character

If you want to return to the complete list of sources after using the filter, click **Sources** in the navigation bar.

The lower part of the work area lists the available sources alphabetically in a table. Each row of this table is structured in the following way:

-  Check box – Select a check box next to a source to mark the source for deletion.
-  **Edit** button – Click to edit the source.
-  **View** button – Click to view the source.
- **Source** – The name of the source.
- **Source ID** – The identifier of the local redirection component (parser). The source parser interprets the metadata sent by the link-source and transforms it into an SFX request.
-  **Service** button – Click to display all source services to which this item is connected.
- **Modified** – The date on which the item was last modified.
- **Action** –  **Copy** button – Click to copy the source's data to a new source.

## Editing Sources

You can edit sources from the List of Sources.

**To edit a source:**

- 1 Click the **Edit** button **E** next to the source you want to edit. The Edit Source dialog box opens:
  - If the source is global, the following dialog box opens:

The screenshot shows a dialog box titled "Edit Source - ABC\_CLIO". It has two tabs: "Main" and "Additional details". The "Main" tab is selected. The dialog contains the following fields:

- Source: ABC\_CLIO
- Source ID: ABC (with a help icon)
- Show Availability:  (with a help icon)
- Local 'Show Availability' Settings: INHERIT (dropdown menu, with a help icon)
- Internal description: (text area)

A "Submit" button is located at the bottom right of the dialog.

Figure 14: Edit Global Source

To override the global show availability setting, from the **Local 'Show Availability' Settings** drop-down list, select one of the following options:

- INHERIT – Inherit availability settings from the global record
- YES – Show availability settings
- NO – Do not show availability settings

- If the source is local, the following dialog box opens:

The screenshot shows a dialog box titled "Edit Source - ABC\_CLIO\_LOCAL". It has two tabs: "Main" and "Additional details". The "Additional details" tab is selected. The dialog contains the following fields and controls:

- Source:** A text box containing the value "ABC\_CLIO\_LOCAL".
- Source ID:** A text box containing the value "ABC", with a question mark icon to its left.
- Description:** A text box that is currently empty.
- Show Availability:** A checkbox that is checked, with a question mark icon to its left.
- Internal description:** A text box that is currently empty.

A "Submit" button is located at the bottom right of the dialog box.

Figure 15: Edit Local Source

To display the availability information in the SFX menu for a particular source, select the **Show Availability** check box.

For more information about this option, refer to the **Using a Special Displayer to Show Date Threshold Information in the SFX Menu** section of the *SFX Advanced User's Guide*.

- 2 Edit the fields as appropriate.

---

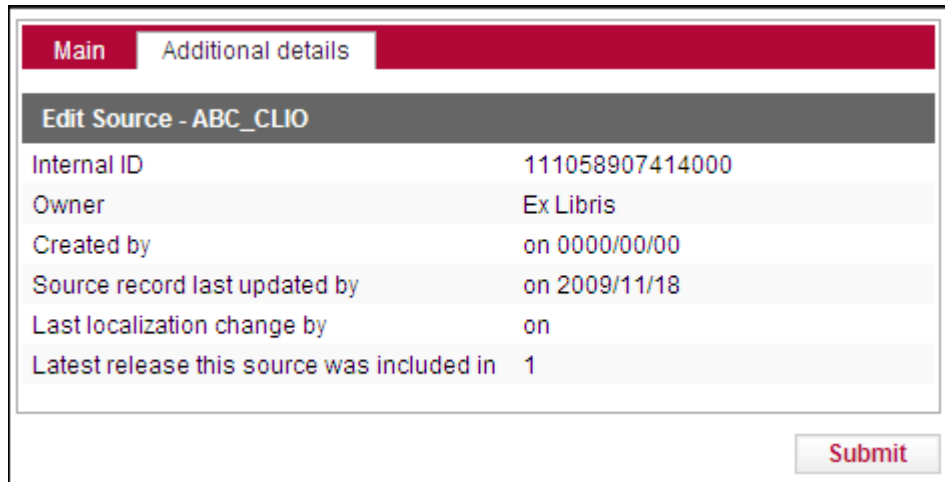
**IMPORTANT:**

When editing a source, do not leave the **Source ID** field empty.

---



- 3 For additional details, click the **Additional Details** tab. The Additional Details dialog box opens:



The screenshot shows a dialog box with two tabs: 'Main' and 'Additional details'. The 'Additional details' tab is selected. The title bar reads 'Edit Source - ABC\_CLIO'. Below the title bar is a table with the following data:

Internal ID	111058907414000
Owner	Ex Libris
Created by	on 0000/00/00
Source record last updated by	on 2009/11/18
Last localization change by	on
Latest release this source was included in	1

At the bottom right of the dialog box is a 'Submit' button.


Figure 16: Additional Details

- 4 To save your changes, click **Submit**.

## Viewing Sources

You can view sources from the List of Sources.

### To view a source:

- 1 Click the **View** button  next to the source you want to view. The View Source dialog box opens:



The screenshot shows a dialog box with two tabs: 'Main' and 'Additional details'. The 'Additional details' tab is selected. The title bar reads 'View Source - ABC\_CLIO\_LOCAL'. Below the title bar is a table with the following data:

Source	ABC_CLIO_LOCAL
Source ID 	ABC
Show Availability 	YES

At the bottom left of the dialog box is an 'Edit' button, and at the bottom right is a 'Close Window' button.

Figure 17: View Sources

- 2 To edit the source, click **Edit**. For more information on editing sources, see [Editing Sources](#) on page 38.

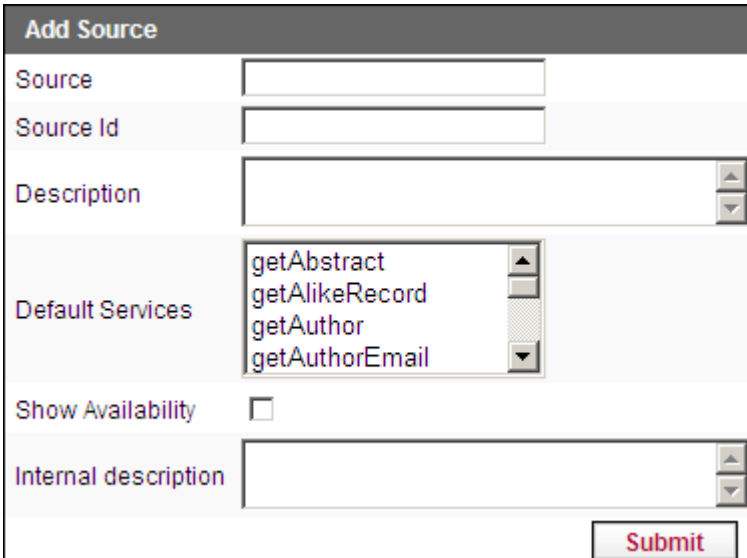
- 3 For additional details, click the **Additional Details** tab.

## Adding Sources

You can add a source to the List of Sources.

### To add a source:

- 1 Click **Add New Source**. The Add Source dialog box opens:




The 'Add Source' dialog box contains the following fields and controls:

- Source**: Text input field.
- Source Id**: Text input field.
- Description**: Text area with scrollbars.
- Default Services**: List box containing 'getAbstract', 'getAlikeRecord', 'getAuthor', and 'getAuthorEmail'.
- Show Availability**: Checkbox.
- Internal description**: Text area with scrollbars.
- Submit**: Button at the bottom right.

Figure 18: Add Source

- 2 Fill in the fields to add a new source. The **Source** and **Source ID** fields are mandatory.

You can also add a new source by clicking the **Copy** button  next to the source you want to copy. The Add Source dialog box opens, containing the source's data, including the source's services. The suffix `_LCL` is automatically added to the name of the original source. Modify the information, if necessary.

- 3 To save your changes, click **Submit**.

The source is added.

## Deleting Sources

You can delete a source from the List of Sources.

**To delete a source:**

- 1 Select the check box next to the source you want to delete.
- 2 Click **Delete**.

The source is deleted.

---

**NOTES:**

- Only locally created sources can be deleted. Sources that are part of the global KnowledgeBase cannot be deleted.
  - There is no rollback in KBManager. Once you confirm the deletion, all of the source's data is lost. All connections to services from the deleted source are also deleted.
- 

## Source Services

To display all available services for a source, click the **Services** button  in the List of Sources. The List of Source Services window opens:

The screenshot shows the KBManager interface. At the top, there are navigation tabs: Home, KBManager (selected), KBTools, Statistics, and Troubleshooting. Below that, there are sub-tabs: Sources (selected), Targets, Objects, Linking Parameters, and Institutes. The main content area is titled "List of Source Services for ABC\_CLIO". It contains several buttons: "Add New Service", "Activate All", "Deactivate All", "Delete", "Show All", and "Show Active". Below the buttons, it displays "Available: 24 services", "Database: ABC", "Source: ABC\_CLIO", and a "Back to Source" link. The main part of the interface is a table with the following columns: #, Service, Modified, and Active. Each row in the table has a checkbox, an "E" button, a "V" button, the service name, the modified date, and an "Active" status indicator (a yellow checkmark).

#	Service	Modified	Active
1	getAbstract	2009/11/18	✓
2	getAlikeRecord	2009/11/18	✓
3	getAuthor	2009/11/18	✓
4	getAuthorEmail	2009/11/18	✓
5	getBookReview	2009/11/18	✓
6	getCitedAuthor	2009/11/18	✓
7	getCitedBook	2009/11/18	✓
8	getCitedGenome	2009/11/18	✓
9	getCitedJournal	2009/11/18	✓
10	getCitedRecord	2009/11/18	✓
11	getCitedReference	2009/11/18	✓
12	getDocumentDelivery	2009/11/18	✓

Figure 19: List of Source Services

Each source can perform a number of source services if the target to which the source is connected also has this service available. For example, the source `ISI_WEB_OF_KNOWLEDGE` can provide the `getHolding` service. The `Local Catalogue` target also can provide the `getHolding` service. A connection is made between the source and the target so that the `getHolding` service is available to you.

For a list of possible service types, refer to **Appendix B – List of Service Types** in the *SFX Advanced User's Guide*.

You can perform the following activities for source services:


- **Editing Source Services** on page 45
- **Viewing Source Services** on page 46
- **Activating Source Services** on page 46
- **Deactivating Source Services** on page 46

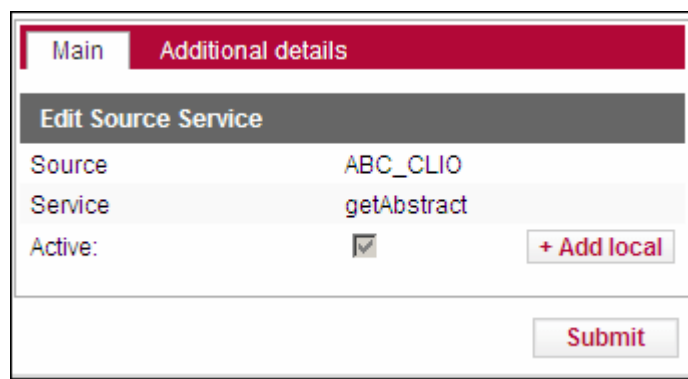
- [Adding Source Services](#) on page 47
- [Deleting Source Services](#) on page 47

### Editing Source Services

You can edit source services from the List of Source Services.

#### To edit a source service:

- 1 Click the **Edit** button  next to the source you want to edit.
  - If the source is global, the following dialog box opens:

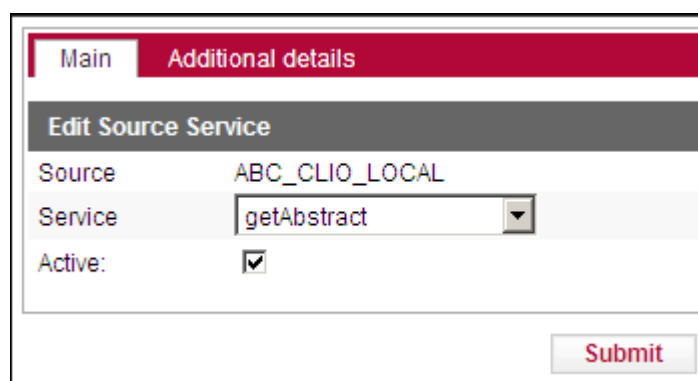


Main		Additional details	
<b>Edit Source Service</b>			
Source	ABC_CLIO		
Service	getAbstract		
Active:	<input checked="" type="checkbox"/>	<a href="#">+ Add local</a>	
<a href="#">Submit</a>			

Figure 20: Edit Global Source Services

The global information is read-only. To add a local activation to the global source service, click **+Add local**.

- If the source is local, the following dialog box opens:



Main		Additional details	
<b>Edit Source Service</b>			
Source	ABC_CLIO_LOCAL		
Service	getAbstract		
Active:	<input checked="" type="checkbox"/>		
<a href="#">Submit</a>			

Figure 21: Edit Local Source Service

You can change the service and activate or deactivate it.

- 2 For additional details, click the **Additional Details** tab.
- 3 To save your changes, click **Submit**.

### Viewing Source Services

You can view source services from the List of Source Services.

#### To view a source service:




- 1 Click the **View** button  next to the source service you want to view. The View Source Service dialog box opens:





Figure 22: View Source Service

- 2 To edit the source service, click **Edit**. For more information, see [Editing Source Services](#) on page 45.
- 3 For additional details, click the **Additional Details** tab.

### Activating Source Services

To activate a source service, click the gray arrow . The arrow becomes green . To activate all source services, click **Activate All**.

### Deactivating Source Services

To deactivate a source service, click the green arrow . The arrow becomes gray . To deactivate all source services, click **Deactivate All**.

---

#### IMPORTANT:

Deactivating a source service only if you do not want a service displayed in the SFX menu for a specific source, but you still want the target services to be available.

---

## Adding Source Services

You can add source services to the List of Source Services.

### To add a source service:

- 1 Click **Add New Service**. The Add Source Service dialog box opens:

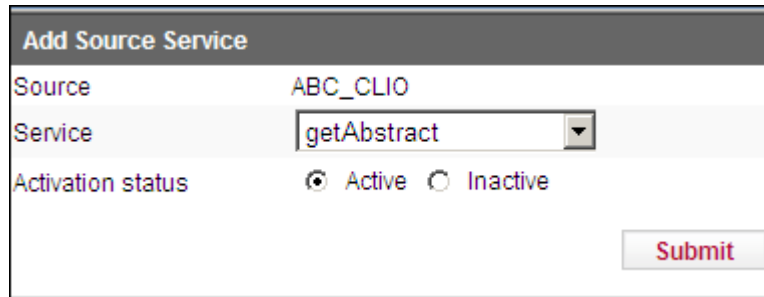


Figure 23: Add Source Service

- 2 From the **Service** drop-down list, select a service
- 3 Under **Activation status**, select **Active** or **Inactive**.
- 4 To save your changes, click **Submit**.

The source service is added.

## Deleting Source Services

You can delete source services from the List of Source Services.

### To delete a source service:

- 1 Select the check box next to the source service you want to delete.
- 2 Click **Delete**.

The source service is deleted.

## Targets

---

### NOTE:

For advanced information on targets, refer to the *SFX Advanced User's Guide*.

---

This section includes the following:

- **Targets Overview** on page 48

- [List of Targets](#) on page 49
- [Editing Targets](#) on page 53
- [Viewing Targets](#) on page 61
- [Activating Targets](#) on page 62
- [Deactivating Targets](#) on page 63
- [Adding Targets](#) on page 63
- [Deleting Targets](#) on page 65
- [Target Services](#) on page 65
- [Object Portfolios](#) on page 79

## Targets Overview

To display a list of targets, from the KBManager section of the Data Management area, click **Targets**. The List of Targets window opens:

The screenshot displays the 'List of Targets' window in the ExLibris SFX KBManager. The window title is 'List of Targets' and it shows a table of 10 targets. The table columns are: #, Target, Threshold, Modified, Loc., Active, and Action. The targets listed are: 101COMMUNICATIONS\_PUBLICATIONS, 123LIBRARY, 1FINDR, 856\_URL, A-R-EDITIONS (2/3), AAPGDATAPAGES, AU\_LIBRARY\_SCHOLARLY\_PUBLISHING\_SERV..., AASLH\_PUBLICATIONS, POP\_CULTURE\_UNIVERSE, and FREE\_FULL\_TEXT\_JOURNALS\_IN\_CHEMISTRY. The interface also includes a search bar, a 'Filter Target List by' dropdown, and a 'Go' button. The server time is Tuesday 12 March 2024 - 16:02:59.

#	Target	Threshold	Modified	Loc.	Active	Action	Action
1	101COMMUNICATIONS_PUBLICATIONS	S P	2021/04/29			C	C
2	123LIBRARY	S P	2024/03/12		✓	C	C
3	1FINDR	S	2023/11/27		✓	C	C
4	856_URL	S	2021/04/29		✓	C	C
5	A-R-EDITIONS (2/3)						
6	AAPGDATAPAGES	S P	2024/03/12		✓	C	C
7	AU_LIBRARY_SCHOLARLY_PUBLISHING_SERV...	S P	2022/06/15		✓	C	C
8	AASLH_PUBLICATIONS	S P	2023/11/27		✓	C	C
9	POP_CULTURE_UNIVERSE	S P	2023/11/27		✓	C	C
10	FREE_FULL_TEXT_JOURNALS_IN_CHEMISTRY	S P	2024/03/12		✓	C	C

Figure 24: List of Targets

For customers using the Primo discovery system and CDI, the List of Targets contains information about two kinds of resources:

- SFX link targets – targets the SFX link resolver displays in the SFX menu and the A-Z list of the SFX link resolver and can be used for linking. Each target provides services that are described in the corresponding target service list. Refer to **Appendix B – List of Service Types** in the *SFX Advanced User's Guide* for a list and description of services that can be defined.



- SFX search targets (available when configured for CDI) – targets the SFX link resolver does not display in the SFX menu, but are included in the SFX KnowledgeBase to allow activation for CDI discovery.

#	+	Target	Threshold	Modified	Loc.	Active	Action
1	E V	DIGITAL_COLLECTION_UNIVERSITY_OF_RHODES		2023/12/17		✓	
2	E V	101COMMUNICATIONS_PUBLICATIONS	S P	2021/04/29		✓	C
3	E V	123LIBRARY	S P	2024/03/11		✓	C
4	E V	1FINDR	S	2023/12/17		✓	C
5	E V	856_URL	S	2024/03/11		✓	C
6	+	A-R-EDITIONS (2/3)				✓	
7	E V	AAPGDATAPAGES	S P	2023/12/17		✓	C
8	E V	AU_LIBRARY_SCHOLARLY_PUBLISHING_SERVICES	S P	2022/06/15		✓	C
9	E V	AASLH_PUBLICATIONS	S P	2024/03/11		✓	C
10	E V	ABANT_IZZET_BAYSAL_UNIVERSITY_INSTITUTIONAL_REPOSITORY		2023/12/17		✓	C
11	E V	POP_CULTURE_UNIVERSE	S P	2023/12/17		✓	C
12	E V	FREE_FULL_TEXT_JOURNALS_IN_CHEMISTRY	S P	2023/12/17		✓	C
13	+	ABC_CLIO (15/40)				✓	
14	E V	ABC_ES	S P	2024/03/11		✓	C
15	+	ABES (3)				✓	
16	E V	MINISTRY_MATTERS	S P	2021/04/29		✓	C
17	E V	AB_IMPERIO	S P	2021/04/29		✓	C
18	+	ACADEMIA_SINICA (1/2)				✓	
19	E V	ACADEMIC_JOURNALS_FREE	S P	2023/12/17		✓	C
20	E V	ACADEMY_OF_MANAGEMENT	S P	2023/12/17		✓	C

Figure 25: List of Targets When Configured for CDI

## List of Targets

The layout of the work area for the List of Targets is similar to that of the List of Sources. The work area displays a menu bar, a navigation bar, and a list of all available targets.

The title bar indicates what list is being displayed. The navigation bar contains the following sections:

- **Add New Target** – Click to add a new target.
- **Activate** – Click to activate selected targets.
- **Deactivate** – Click to deactivate selected targets.
- **Activate for Search** – Click to activate the selected targets for searching in CDI discovery when the **Available for CDI discovery activation** option is set to **Yes** (only appears when using the Primo discovery system and CDI).
- **Deactivate for Search** – Click to deactivate the selected targets for searching in CDI discovery when the **Available for CDI discovery activation** option is set to **Yes** (only appears when using the Primo discovery system and CDI).

- **Show** – Select the number of targets to be displayed per page
- **Delete** – Click to delete selected targets.
- **Show All, Show Active, Show Inactive, and Show New** – Change the view of the List of Targets.

---

**NOTE:**

If a target has both active and inactive subtargets they are displayed both in the Show Active view and the Show Inactive view. Therefore, the number of active targets plus the number of inactive targets may be greater than the number of available targets.

---

- **Available** – The number of targets in the table. Subtargets (which are accessible by clicking + ) are not included in this number.
- **Database** – The name of the database in which you are currently working
- **Filter Target List by Name** – Type the name of the target you want to view. You can search for targets using any two or more words in its name (in any order) to find a target name.
- **Additional Target List Filters** – You can filter the results by clicking **Add Condition**, selecting one or more of the following options from the drop-down list, selecting **Yes** or **No** for each option you select, and then clicking **Go**:
  - Full Text
  - Local
  - New Targets
  - Using Proxy














For customers using the Primo discovery system and CDI, the following CDI Target list filters are available:

- Available for CDI discovery activation – **Yes** indicates this target can be activated for discovery independent from its full text activation status.
- CDI Search Rights – Select **Free** for targets whose content can be searched for free or **Subscription** for all targets that require a subscription to search for their content.
- CDI Full Text Rights:
  - Open Access – All targets that do not require a subscription to access full text.
  - Subscription (Target Level) – All targets that require a subscription for full text and are set to available on the target level. They do not use the link resolver for selectively setting the target content to available.





- Subscription (Title Level) – All targets that require a subscription for full text and the availability setting is performed selectively on the item level, based on your link resolver activations.
- CDI Linking – Indicates which type of link is needed to provide full text for a target. Valid values are **Link via Link resolver** and **Link in record**.
- Contains Newspapers in CDI:
  - Yes – All targets with content that is available in both the Newspaper Search interface and the Regular Primo search interface.
  - Yes, Newspapers Search only – All targets with content that is available exclusively from the Newspaper Search interface, not from the Regular Primo search interface.
  - No – All targets that are not available using the Newspaper Search interface because they do not contain newspapers.
- Provider coverage:
  - Yes – this target is updated with data directly received from the provider.
  - No – the target is not updated by a data feed directly from the provider, but at least 80% of the content of the target is covered in CDI by data received from other providers.
- CDI type – Values can be: Abstracting & Indexing database (A&I), Full Text Collection, and Hybrid
- Selective: Values can be Yes/No – Used to define the type of subscription for this target. **Yes** indicates a selective subscription and **No** indicates a non-selective target. Selecting **No** for non-selective targets causes the **FullText Available** indicator to appear for non-selectively subscribed targets, and improves the fulltext availability indication for non-ID (ISSN/ISBN) content that is harder to match to customer subscriptions.
- Do not show as Full Text available in CDI even if active in SFX: Values can be Yes/No – This option is set to **Yes** if you want the fulltext active for the link resolver, but you do not want the same fulltext visible in the filtered search in discovery.
- **Filter Target List by Type** (available if CDI is configured) – Select an option to filter the Target List to display:
  - Link targets
  - Link and search targets
  - Search targets

To reset the filter, click **Targets** in the navigation bar.

The lower part of the work area lists the available targets alphabetically in a table. Each row of this table is structured in the following way:

-  Check box – Select a check box next to a target to mark the target for deletion.
  -  – The number of the target in the list
  -  Expand button – Click to expand the lists of targets on the page that are organized by provider name
  -  **Edit** button – Click to edit the target.
  -  **View** button – Click to view the target.
  - **Target** – Displays the name of the target. If a target was added in the last four revisions a **NEW** icon is displayed.
  - **Threshold** – The active threshold is shown. In most cases, the global threshold is displayed, unless the local threshold field contains information specific to your institution’s digital environment.
  -  **Expand** button – Click to expand the list of targets organized by Provider Name.
  -  **Service** button – Click to display all target services to which this item is connected. This button appears green if at least one `getFullTxt` service has been activated for either DEFAULT or Institute/Group.
  -  **Portfolio** button – Click to display all object portfolios connected to this target’s services. This button appears green if at least one `getFullTxt` portfolio has been activated for either DEFAULT or Institute/Group.
  - **Modified** – Displays the date on which the item was last modified. This date is updated when the item is changed by the customer, or by Ex Libris as part of the global KnowledgeBase update.
  - **Local** – One of the following icons is displayed:
    -  Global – part of the global KnowledgeBase created and maintained by Ex Libris
    -  Localized – global item with a local threshold, and/or `parse_param` added by the customer for either default or institute or with a Authentication Note and/or a General Note added by the customer.
    -  Local – locally created by the customer
- If the icon has a pencil, an internal description exists for the target.
-   Active/Inactive indicator for full text and linking in SFX. Click to toggle the activation status of the item. Activating a target available for CDI discovery activation for full text also automatically activates the target for

searching in CDI discovery (only when CDI is configured in the SFX instance).

- If institutes are defined in the instance, the **Institution** column appears. The Institute icon is displayed in yellow  if institute settings exist for the target. (For more information about institutes, refer to the Institute Feature section of the *SFX Advanced User's Guide*.)
-   Active/Inactive indicator for search in CDI discovery. Click to toggle for search activation status in CDI discovery (only available if CDI is configured). If no icon appears, this target cannot be activated for search in CDI discovery.
- **Action** –  **Copy** button – Click to copy the target's data to a new target.

## Editing Targets

You can edit targets from the List of Targets.

### To edit a target:


- 1 Click the **Edit** button  next to the target you want to edit.
  - If the target is global, not available for CDI activation, the following dialog box opens:

Figure 26: Edit Target

- a Fill in the fields according to the following table:

Table 3. Edit Target

Field	Description
<b>Target</b>	The name of the target for internal use.
<b>Public Name</b>	The title of the target displayed to the user in the SFX menu. Do not use the # character in the public name of the target. This causes problems when exporting database information.
<b>Activation Status</b>	Indicates if the target is active.  If institutes have been defined in the instance, the Institute field is displayed, indicating the activation per institute.  For more information about institutes, refer to the <b>Institute Feature</b> section of the <i>SFX Advanced User's Guide</i> .

Table 3. Edit Target

Field	Description
<b>Threshold</b>	Limitations on the availability of this target
<b>Character Set</b>	The type of characters used to display information by this target. By default, the character set used for targets is LATIN-1. The <b>Character Set</b> field can be used to specify a different character set for a particular target. See the <b>Character Set Values Used in the Target char_set Field</b> on page 147 for a complete list of character set values that can be chosen.
<b>Aggregator</b>	Indicates if the target is an aggregator.
<b>Target Type</b>	The type of the target. Possible values are: <ul style="list-style-type: none"> <li>■ Journal</li> <li>■ Book</li> <li>■ Mixed</li> <li>■ A&amp;I</li> <li>■ Web Service</li> <li>■ OPAC</li> </ul>
<b>Authentication Note</b>	User authentication to be displayed in the SFX menu. For example, you can enter the user name and password needed to log on to the target. HTML tags can be used to make text italic or bold. For example: <pre>Authentication needed - login:&lt;B&gt;bibuser&lt;/B&gt; - password:&lt;B&gt;xxxxx&lt;/B&gt;</pre> <p>To assign different local authentication notes per language defined in the instance, click the Globe icon.</p>
<b>General Note</b>	General information to be displayed in the SFX menu. HTML tags can be used to make text italic or bold. <p>To assign different local general notes per language defined in the instance, click the Globe icon.</p>
<b>Internal Description</b>	Internal notes for a target. These are displayed only in the Admin Center interface.
<b>DB ID</b>	An identifier used in CDI. Included in the CDI export for the SFX instance when publishing the CDI holdings file of the institution.

Table 3. Edit Target

Field	Description
Available for CDI discovery activation	<b>Yes</b> indicates that this target can be activated for discovery independent from its full text activation status. This is the case for targets where at least 80% of the collection is indexed either directly (via provider content) or indirectly (via alternative coverage by metadata from other collections that index the same material) in CDI. Note that other targets of the same provider may also be indexed in CDI even if they are not marked as <b>Available for CDI discovery activation</b> . This is the case if a target cannot be activated for discovery in CDI separately from the full text activation.

**NOTE:**

Some HTML/JS tags are not allowed in KBManager fields for security reasons (to prevent XSS). It is possible to disable XSS for specific fields, for example, if you want to embed license information in iframes in the SFX menu. For more information on disabling XSS, see the **XSS - Cross-Site Scripting Security Breach** section of the *SFX System Administration Guide*.

- b To add a local public name, click **+Add local**. The Public Name (local) field appears with a globe icon:



Figure 27: Add Public Local Name

- c Enter a local public name. To assign different local public names per language, click the Globe icon. The languages that you have configured appear (see **Show Language Drop-Down** on page 430). For example:



Figure 28: Public Local Name Translations

- d Enter a public local name for each language. These override the local public name you entered on the previous page.



- e Click **Submit**.
- f To add a local threshold, click **+Add local**. (See **Threshold Composer** on page 118 for more information.)
  - If the target is not available for CDI activation, the following dialog box opens:

The screenshot shows a web-based dialog box titled "Edit Target- main tab". It has two tabs: "Main" and "Additional details". The "Main" tab is selected. The form contains the following fields and controls:

- Target:** Text input with "AAA" and a dropdown with "LCL".
- Public name(global):** Text input with "ABC" and a "+ Add local" button.
- General description:** Text area.
- Activation status:** Radio buttons for "Active" (selected) and "Inactive".
- Threshold (global):** Text area with a "+ Add local" button.
- Character Set:** Dropdown menu with "iso-8859-1".
- Aggregator ?** Check box (unchecked).
- Target Type:** Dropdown menu with "Journal".
- Authentication note:** Text area with a refresh icon.
- General Note:** Text area with a refresh icon.
- Internal description:** Text area.
- DB ID:** Section with "Available for CDI discovery activation" (checkbox with a red question mark) and "No".

Buttons at the bottom include "Close Window" and "Submit".

Figure 29: Edit Local Target

Fill in the fields as described in **Table 3 Edit Target** on page 54.

- If the target is available for CDI activation, the following fields appear in the Edit Target dialog box:

**This target is searchable via CDI - with the following setting:**

Search rights	Free <span>?</span>
Fulltext rights	Subscription (Linkresolver)
Linking	Linkresolver
Newspaper ?	No
Number of records	3495024
Resource Types	web resource, publication, ebook, conference proceeding, journal
CDI update frequency	Monthly
Provider coverage	No
CDI Type	Full Text Collection
CDI Last Market update	<span>?</span>
Active in:	<input type="checkbox"/> SFX for linking and full text availability <span>?</span> <input checked="" type="checkbox"/> CDI for discovery <span>?</span>
Selective ?	Yes <span>▼</span>
Do not show as Full Text available in CDI even if active in SFX <span>?</span>	No <span>▼</span>

Close Window Submit

Figure 30: Edit Target in CDI

The following table describes the fields of this dialog box:

Table 4. Edit Target – Search Target

Field	Description
Search Rights	Possible values are: <ul style="list-style-type: none"> <li>■ <b>Free</b> – the target’s content can be searched for free</li> <li>■ <b>Subscription</b> – the target requires a subscription to search its content.</li> </ul>

Table 4. Edit Target – Search Target

Field	Description
Full Text Rights	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>■ Open Access – the target does not require a subscription to access full text.</li> <li>■ Subscription (target level) – The target requires a subscription for fulltext and is set to available on the target level. It does not use the link resolver for selectively setting the target content to available.</li> <li>■ Subscription (Title Level) – The target requires a subscription for fulltext and the availability setting is performed selectively on the item level, based on your link resolver activations.</li> <li>■ Partially Open Access – The target is part of a mixed collection where some of the records are available as Open Access while other records are restricted or have no access to full text.</li> <li>■ Hybrid – The target is part of a collection where some of the records contain full text links and some do not: <ul style="list-style-type: none"> <li>■ Records with a fulltext link in the record are returned as available in a filtered search, with linking from Direct Link/Link in Record.</li> <li>■ Records with no fulltext link in the record are returned in a filtered search when they match to other active subscriptions with linking from Link Resolver.</li> </ul> </li> </ul>
Linking	<p>Indicates which type of link (target level or link resolver) is needed to provide full text for a target. Valid values are:</p> <ul style="list-style-type: none"> <li>■ Linkresolver – link to fulltext via Link Resolver</li> <li>■ Link in record – link to fulltext via the Link in the CDI provider record.</li> <li>■ Hybrid – link to fulltext is from Link Resolver for part of the collection content (for records with ISSN/ISBN identifiers) and from Link in Record for the other records in the collection (for content without identifiers)</li> </ul>

Table 4. Edit Target – Search Target

Field	Description
Newspapers?	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>■ Yes – the target’s content is available in both the Newspaper search interface and the Primo search interface.</li> <li>■ Yes, Newspapers Search only – the target has content that is available exclusively with the Newspaper search interface and not the Primo search interface.</li> <li>■ No – the target is not available using the Newspaper search interface because it does not contain newspapers.</li> </ul>
Number of records	The number of records currently indexed in CDI. This number is updated in SFX for each target twice a year.
Resource Types	Lists up to 5 of the most frequently index resource types for the target. This list is updated in SFX for each target twice a year.
CDI update frequency	The estimated update frequency of the target in CDI. Possible values are <b>Weekly</b> , <b>Monthly</b> , <b>Quarterly</b> and <b>Yearly</b> . The update frequency is based on the average update frequency of the last 12 months and is updated in SFX for each target twice a year.
Provider coverage	<p><b>Yes</b> – this target is updated with data we directly receive from the provider.</p> <p><b>No</b> – the target is not updated by a data feed directly from the provider, but at least 80% of the content of the target is covered in CDI by data received from other providers.</p>
Coverage percentage	The percentage of the collection covered in CDI, and the last time the percentage was calculated
CDI Type	<p>Values can be:</p> <ul style="list-style-type: none"> <li>■ Abstracting &amp; Indexing database</li> <li>■ Full Text Collection</li> <li>■ Hybrid – part of the collection has full text and part is A&amp;I only</li> </ul>
CDI Last Market update	Last update date for this target in CDI

Table 4. Edit Target – Search Target

Field	Description
Active in	<p>The two types of activation for this target:</p> <ul style="list-style-type: none"> <li>■ <b>Activation for linking and full text availability</b> – if selected, the target is active for SFX and (depending on the type of target), appears in the SFX menu, the A- List, and the eBook Search. Note that target services and portfolios (if available) need to be active as well. This indication is read-only.</li> <li>■ <b>Activation for search/discovery in CDI</b> – If selected, the target content is searchable in CDI from Primo.</li> </ul> <hr/> <p><b>NOTE:</b> If the target has institute specific activations, the activation for fulltext and CDI searching is configurable in the separate Institute section of the Edit Target dialog box.</p>
Selective?	<p>Indicate the type of subscription for this target: Select <b>Yes</b> to indicate a selective subscription and <b>No</b> to indicate a non-selective target. Selecting <b>No</b> for non-selective targets causes the FullText Available indicator to appear for non-selectively subscribed targets, and improves the fulltext availability indication for non-ID (ISSN/ISBN) content that is harder to match to customer subscriptions.</p>
Do not show as Full Text available in CDI even if active in SFX	<p>Set this option to <b>Yes</b> if you want the full text active for the link resolver, but you do not want the same full text visible in the filtered search in discovery.</p>

2 For additional details, click the **Additional Details** tab.

3 To confirm the changes, click **Submit**.


**NOTE:**

Before the SFX June 2021 release, targets with CDI search rights set to **Subscription** could not be activated for search. From the SFX June 2021 release and later, it is possible to use both discovery and the full activation for targets with the CDI search rights set to **Subscription**. Both types of activations ensure that the collection is searched in CDI.

## Viewing Targets

You can view targets from the List of Targets.

### To view a target:

- 1 Click the **View** button  from the List of Targets. The View Target dialog box opens:

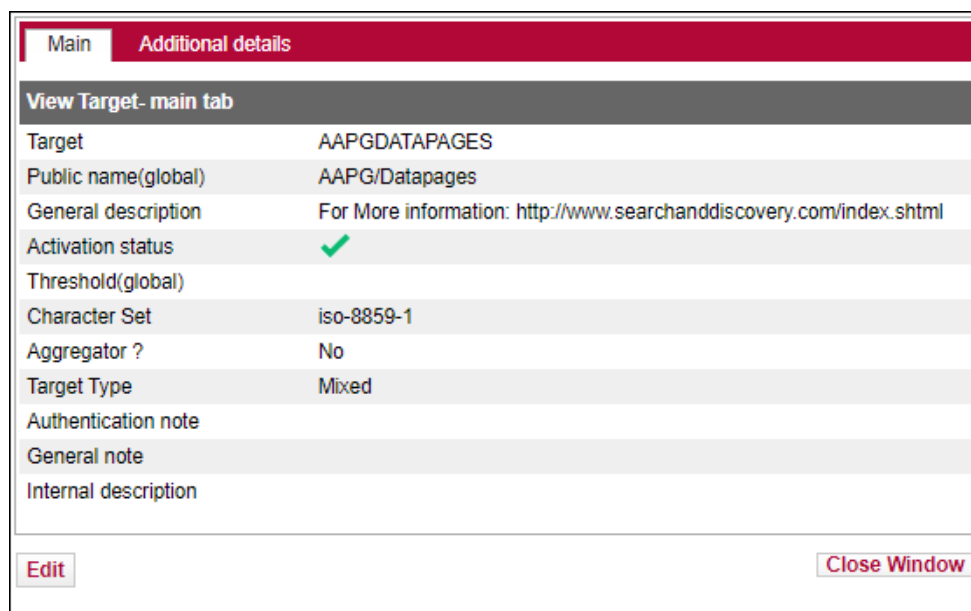


Figure 31: View Target




- 2 To edit a target, click **Edit**. For more information on editing targets, see [Editing Targets](#) on page 53.
- 3 For additional details, click the **Additional Details** tab.

## Activating Targets



For customers using the Primo discovery system and CDI, linking and search targets can be activated and deactivated independently. Activate linking targets if they are services to which your institution subscribes or provides access and to which linking is possible. Activate search targets to make them available for CDI discovery. In order for the linking targets to work, the following conditions must be met:

- If full text linking is from the Link Resolver:
  - A target parser that is programmed to link to the target service is required. All targets delivered in the SFX database have ready-to-use parsers.
  - If necessary, provide authentication information to enable access to the target service.

- If full text linking is from Link in Record, the target link appears only in CDI (not in the SFX menu) and linking occurs from the Provider link in the CDI record.

To activate a target, click the gray arrow . The arrow becomes green . If the target is configured for CDI, a yellow dot  appears next to the arrow indicating that it is activated for searching as well. Alternatively, select the check boxes next to the targets you want to activate and click **Activate**. Additionally, you can activate and deactivate linking and search targets from the Edit window. For more information, see [Editing Targets](#) on page 53.

## Deactivating Targets

To deactivate a linking target, click the green arrow . The arrow becomes gray . Alternatively, select the check boxes next to the targets you want to deactivate and click **Deactivate**. You deactivate search targets from the Edit window. For more information, see [Editing Targets](#) on page 53.

## Adding Targets

You can add targets to the List of Targets.

### To add a target:

- 1 Click **Add New Target**. The Add Target dialog box opens:

The screenshot shows the 'Add Target' dialog box with the following fields and values:

- Target:** Text input field containing '\_LCL'.
- Public Name:** Empty text input field.
- Services:** List box containing 'getAbstract', 'getAlikeRecord', 'getAuthor', and 'getAuthorEmail'.
- Activation status:** Radio buttons for 'Active' (selected) and 'Inactive'.
- Threshold:** Empty text input field.
- General description:** Empty text input field.
- Character Set:** Dropdown menu with 'iso-8859-1' selected.
- Aggregator?:** Unchecked checkbox.
- Target Type:** Dropdown menu with 'Journal' selected.
- Authentication note:** Empty text input field.
- General note:** Empty text input field.
- Internal description:** Empty text input field.

Buttons at the bottom: 'Close Window' and 'Submit'.

Figure 32: Add Target

- 2 Fill in the fields as described in **Table 3 Edit Target** on page 54.
- 3 In the **Services** field, select the services offered by the target you are adding.

You can also add a new target by clicking the **Copy** button next to the target you want to copy. The Add Target dialog box opens, containing the target's data, including the target's services and object portfolios. The suffix



`_LCL` is automatically added to the name of the original target. Modify the information, if necessary.

- 4 To confirm your changes, click **Submit**.

The target is added.

---

**NOTE:**

Make sure that the target names are in uppercase letters and without spaces. Spaces should be filled with underscores (`_`). For example, if you want to add a new target called `wild nature`, enter the following:

`WILD_NATURE`.

---

## Deleting Targets

You can delete targets from the List of Targets.

**To delete a target:**

- 1 Select the check box next to the target you want to delete.
- 2 Click **Delete**.

The target is deleted.

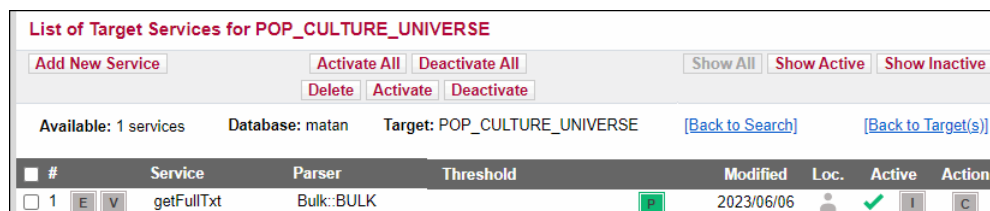
---

**NOTES:**

- Only locally created targets can be deleted, not targets that are part of the global KnowledgeBase provided by Ex Libris.
  - There is no rollback in KBManager. Once you confirm the deletion, all target data is lost. All connections to services associated with the deleted targets are also deleted.
- 

## Target Services











To display all available services for a target, click the **Services** button  in the List of Targets. The List of Target Services window opens:




#	Service	Parser	Threshold	Modified	Loc.	Active	Action
1	getFullTxt	Bulk:BULK		2023/06/06		✓	I C

Figure 33: List of Target Services

Each row of this table is structured in the following way:

-  Check box – Select a check box next to a target to mark the target for deletion, activation, or deactivation.
  -  **Edit** button – Click to edit the target service.
  -  **View** button – Click to view the target service.
  - **Parser** – Displays the name of the target parser that creates the URLs needed when linking to a particular target service. For more information, see [Target Parsers](#) on page 110.
  - **Threshold** – Displays the active threshold. In most cases, the global threshold is displayed, unless the local threshold field contains information specific to your institution's digital environment.
  -  **Portfolio** button – Click to view the list of object portfolios of the target service. This button appears green if at least one getFullTxt portfolio has been activated for either DEFAULT or Institute/Group.
  - **Modified** – Displays the date on which the item was last modified. This date is updated when the item is changed by the customer, or by Ex Libris as part of the global KnowledgeBase update.
  - **Local** – One of the following icons is displayed:
    -  Global – part of the global KnowledgeBase created and maintained by Ex Libris
    -  Localized – global item with a local threshold, and/or parse\_param added by the customer for either default or institute or with a Authentication Note and/or a General Note added by the customer.
    -  Local – locally created by the customer
- If the icon has a pencil, an internal description exists for the target service.
-  **Active/Inactive indicator** – Click to toggle the activation status indicator for the item.
  - If institutes are defined in the instance, the **Institution** column appears. The Institute icon  is displayed in yellow if institute settings exist for the target. (For more information about institutes, refer to the Institute Feature section of the *SFX Advanced User's Guide*.)
  -  **Copy** button – Click to copy the service's data to a new service.

-  **Linking Parameters** button – Click to add and edit local information, such as user names and passwords. This button appears green if at least one L/P has been filled in for either DEFAULT or institute/Group.


The following activities are available for target services:

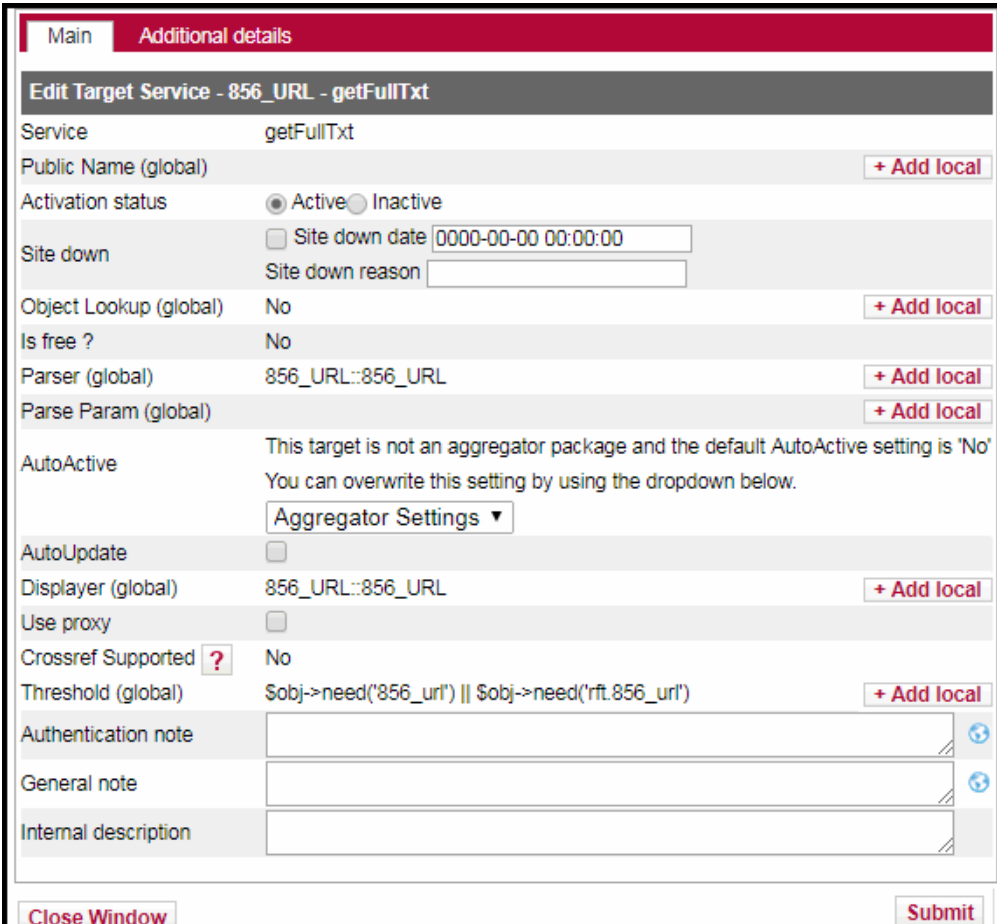
- **Editing Target Services** on page 67
- **Viewing Target Services** on page 73
- **Viewing Target Service Linking Parameters** on page 74
- **Activating Target Services** on page 75
- **Deactivating Target Services** on page 76
- **Adding Target Services** on page 76
- **Deleting Target Services** on page 78
- **Configuring Institute Restrictions** on page 78

### ***Editing Target Services***

You can edit target services in the List of Target Services.

### To edit a target service:

- 1 Click the **Edit** button  next to the target service you want to edit. The Edit Target Service dialog box opens:






Main		Additional details	
<b>Edit Target Service - 856_URL - getFullTxt</b>			
Service	getFullTxt		
Public Name (global)			<a href="#">+ Add local</a>
Activation status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive		
Site down	<input type="checkbox"/> Site down date	0000-00-00 00:00:00	
	Site down reason		
Object Lookup (global)	No		<a href="#">+ Add local</a>
Is free ?	No		
Parser (global)	856_URL::856_URL		<a href="#">+ Add local</a>
Parse Param (global)			<a href="#">+ Add local</a>
AutoActive	This target is not an aggregator package and the default AutoActive setting is 'No'. You can overwrite this setting by using the dropdown below. Aggregator Settings ▾		
AutoUpdate	<input type="checkbox"/>		
Displayer (global)	856_URL::856_URL		<a href="#">+ Add local</a>
Use proxy	<input type="checkbox"/>		
Crossref Supported 	No		
Threshold (global)	\$obj->need('856_url')    \$obj->need('rft.856_url')		<a href="#">+ Add local</a>
Authentication note			
General note			
Internal description			
<a href="#">Close Window</a>		<a href="#">Submit</a>	

Figure 34: Edit Target Service

For the following services, the Autoload tab is displayed:

- BOOKS\_AT\_OVID\_PURCHASE\_AUTOLOAD-getFulltxt
- BOOKS\_AT\_OVID\_SUBSCRIPTION\_AUTOLOAD-getFulltxt
- ELSEVIER\_SCIENCE\_DIRECT\_AUTOLOAD\_BOOKS-getFulltxt
- ELSEVIER\_SCIENCE\_DIRECT\_AUTOLOAD\_JOURNALS-getFulltxt
- OVID\_JOURNALS\_AT\_OVID\_AUTOLOAD-getFulltxt
- SPRINGER\_LINK\_BOOKS\_AUTOLOAD-getFulltxt
- SPRINGER\_LINK\_JOURNALS\_AUTOLOAD-getFulltxt

- TAYLOR\_AND\_FRANCIS\_EBOOKS\_COMPLETE-getFulltxt
- WILEY\_ONLINE\_LIBRARY\_AUTOLOAD\_BOOKS-getFulltxt
- WILEY\_ONLINE\_LIBRARY\_AUTOLOAD\_JOURNALS-getFulltxt

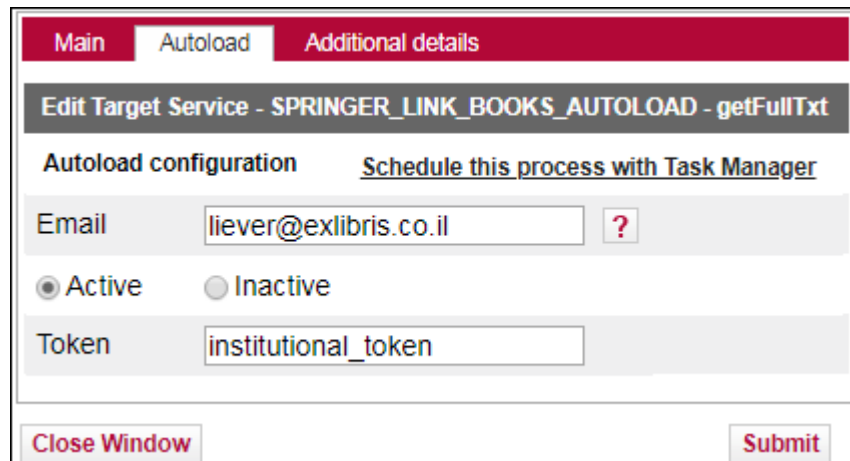


Figure 35: Autoload

**NOTE:**

Making changes to this tab updates the corresponding UNIX configuration files in the SFX instance.

The following options are available:

- **Email:** Provide an email address to which to send notifications
- **Active/Inactive:** Select to activate/deactivate the KBART Autoload option
- **Token:** Enter authentication information (token, username and password) required by the provider.

**NOTE:**

Authentication information can be provided per institute if institutes have been configured in the instance.

- **Schedule this process with Task Manager:** Click to schedule the autoload with Task Manager. (For more information concerning Task Manager, see the **Task Manager** section of the *SFX System Administration Guide*.)

**NOTE:**

The autoload can also be scheduled with the Server Admin Utility.

2 Fill in the fields according to the following table:

Table 5. Edit Target Services

Field	Description
<b>Service</b>	The available target service (not editable for global records)
<b>Public Name</b>	The name of the service in the SFX menu. Select <b>Use default defined for this ServiceType</b> to display the default name for the service type.
<b>Activation Status</b>	<p>Indicates if the target service is active.</p> <p>If institutes have been defined in the instance, the Institute field is displayed, indicating the activation per institute.</p> <p>For more information about institutes, refer to the <b>Institute Feature</b> section of the <i>SFX Advanced User's Guide</i>.</p>
<b>Site Down</b>	<p>Indicates if the target service is temporarily down. This is indicated in the SFX menu by an icon and the words <code>site down</code> instead of the <b>Go</b> button and a link to the target window. This field is only displayed if the target is active.</p> <p>The Site down date and Site down reason fields are used by the SFX Administrator to describe the site down date and reason. These fields are not displayed in the SFX menu and cannot be used to schedule any site down. These two fields are cleared when the status of the target service is changed from <code>site down</code> to <code>site up</code>.</p> <hr/> <p><b>NOTE:</b> Verde customers set this option in Verde – in KB Manager it is read-only.</p> <hr/>
<b>Object Lookup</b>	<p>Select to have the target service displayed in the SFX menu only if the object requested is part of the object portfolio of that particular target service. Mainly used for <code>getFulltxt</code> services.</p> <p>Object lookup is not used when objects do not need to be connected to a particular target service. In this case, the target service is displayed in the SFX menu screen regardless of the object from which you start. This is used for more general, search-oriented target services, such as <code>getHolding</code> or <code>getWebSearch</code> services.</p>
<b>Is free?</b>	Indicates if the service is free.

Table 5. Edit Target Services

Field	Description
<b>Parser</b>	Contains the name of the target parser that creates the URLs needed when linking to a particular target service. For more information, see <b>Target Parsers</b> on page 110.
<b>Parse Param</b>	Contains information that is used by the target parser to create URLs. Fill in the parameters that apply to the whole target service—for example, the base URL. For more information, see <b>Parse Param</b> on page 111.
<b>AutoActive</b>	From the drop-down list, select one of the following to overwrite the default autoactive settings: <ul style="list-style-type: none"> <li>■ <b>Aggregator Settings</b> - Automatically activates the object if the target is an aggregator. If you select this option, the value INHERIT is stored in the SFX database.</li> <li>■ <b>Yes</b> - Automatically activates the object even if the target is not an aggregator.</li> <li>■ <b>No</b> - Does not automatically activate the object even if the target is an aggregator.</li> </ul>
<b>Displayer</b>	Specify a special display type for the target service. If the field is left blank, the default display is used. For more information, see <b>Menu Configuration</b> on page 412.
<b>AutoUpdate</b>	Select to automatically remove local overrides of target service and object portfolio parser and parse param information during the revision update. (For more information, see <b>AutoUpdate</b> on page 533.)
<b>Use Proxy</b>	Select if a proxy server needs to be used to connect to a particular target service.
<b>Crossref Supported</b>	Indicates if the SFX customer is a CrossRef library affiliate member and linking to the article level is available via CrossRef. Refer to the <b>DOI/CROSSREF Setup</b> section of the <i>SFX Advanced User's Guide</i> for more information on CrossRef and the use of DOIs in SFX.
<b>Threshold</b>	Limitations on the availability of this target service.

Table 5. Edit Target Services

Field	Description
<b>Authentication Note</b>	<p>User authentication to be displayed in the SFX menu. For example, you can enter the user name and password needed to log on to the target. HTML tags can be used to make text italic or bold. For example:</p> <pre>Authentication needed - login:&lt;B&gt;bibuser&lt;/B&gt; - password:&lt;B&gt;xxxxxx&lt;/B&gt;</pre> <p>To assign different local authentication notes per language defined in the instance, click the Globe icon.</p>
<b>General Note</b>	<p>General information to be displayed in the SFX menu. HTML tags can be used to make text italic or bold.</p> <p>To assign different local authentication notes per language defined in the instance, click the Globe icon.</p>
<b>Internal Description</b>	<p>Internal notes for a target. These are displayed only in the Admin Center interface.</p>

**NOTE:**

Some HTML/JS tags are not allowed in KBManager fields for security reasons (to prevent XSS). It is possible to disable XSS for specific fields, for example, if you want to embed license information in iframes in the SFX menu. For more information on disabling XSS, see the **XSS - Cross-Site Scripting Security Breach** section of the *SFX System Administration Guide*.

- 3 To add a local public name:
  - a Click **+Add local**. The Public Name (local) field appears with a globe icon:



Figure 36: Add Public Local Name

- b Enter a local public name. To assign different local public names per language, click the Globe icon. The languages that you have configured appear (see **Show Language Drop-Down** on page 430). For example:



**Target Service Public Name Translations for ADISONLINE**

English (Default)	Full text available via
Spanish	Texto completo disponible via
Danish	Fuld tekst tilgængelig via

**Close Window** **Submit**


Figure 37: Public Local Name Translations

- c Enter a public local name for each language. These override the local public name you entered on the previous page.
- d Click **Submit**.
- 4 To add other local values, click **+Add local**.
- 5 For additional details, click the **Additional Details** tab.
- 6 To confirm your changes, click **Submit**.

### **Viewing Target Services**

You can view target services from the List of Target Services.

### To view a target service:

- 1 Click the **View** button  next to the target service you want to view. The View Target Service dialog box opens:

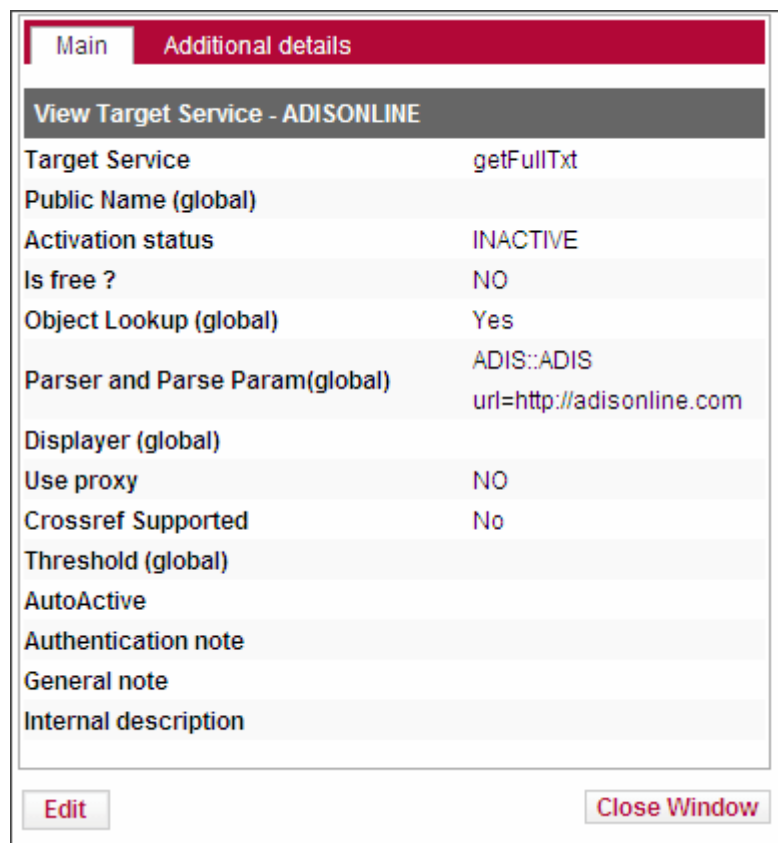


Figure 38: View Target Service

- 2 To edit the target service, click **Edit**. For more information, see [Editing Target Services](#) on page 67.
- 3 For additional details, click the **Additional Details** tab.

### Viewing Target Service Linking Parameters

To view the linking parameters for a target, click the **Linking Parameters** button

 from the List of Target Services. The List of Linking Parameters dialog box for the target opens:

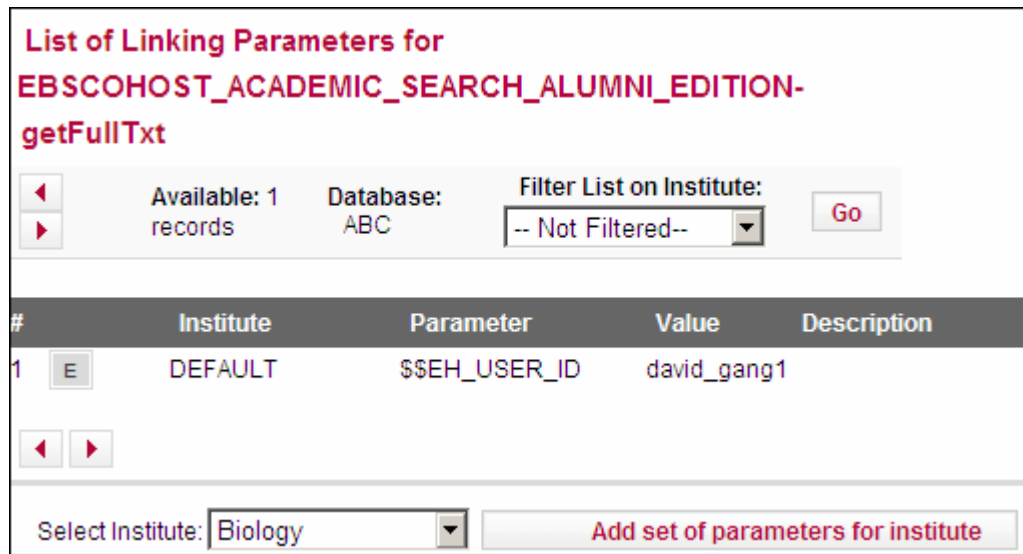


Figure 39: Target Linking Parameters

For a description of this dialog box and more information on linking parameters, see [Linking Parameters](#) on page 109.

### Activating Target Services

You can activate target services if they are related to databases or full-text repositories to which linking is possible. This means:

- The target parser supports this service.
- Your institution has privileges to access the data in the database or full-text repository.

To activate a target service, click the gray arrow . The arrow becomes green . To activate all target services, click **Activate All**.

If the target is an aggregator, the following dialog box opens:

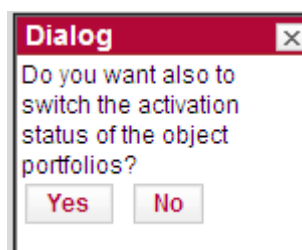




Figure 40: Aggregator Activation

To also switch the activation of the target services's object portfolios, click **Yes**.

### ***Deactivating Target Services***

To deactivate a target service, click the green arrow . The arrow becomes gray . To deactivate all target services, click **Deactivate All**.

### ***Adding Target Services***

You can add target services to the List of Target Services.

**To add a target service:**

- 1 Click **Add New Service**. The Add Target Service dialog box opens:

**Add Target Service**

Target Service ADISONLINE getAbstract

Public Name

General description

Activation status  Active  Inactive

Object Lookup

Is free?

Linking Level ARTICLE

Parser

Parse Param

AutoActive  
This target service is not an aggregator so the default AutoActive setting is off. You can set it to be explicitly On or Off by using dropdown above.  
Aggregator Settings

Displayer

Use proxy

Crossref Supported

Threshold

Authentication note

General Note


Internal description

Compose Clear

Close Window Submit

Figure 41: Add Target Service

- 2 Fill in the fields according to **Table 5 Edit Target Services** on page 70. The **Service** and **Parser** fields are mandatory in order to add a new target service.

You can also add a new target service by clicking the **Copy**  button next to the target service you want to copy. The Add Target Service dialog box opens, containing the target service's data. The suffix `_LCL` is automatically added to the name of the original target service. Modify the information, if necessary.

- 3 To confirm your changes, click **Submit**.

---

**IMPORTANT:**

When adding a new target service, be sure to check whether the target parser in the SFX instance supports the service. For example, if a target has `getFullTxt` service listed in the `TARGET_SERVICE` table, the parser installed for this target needs to support the `getFullTxt` subroutine in order to create links to full-text articles.

---

### **Deleting Target Services**

You can delete target services from the List of Target Services.

#### **To delete a target service:**

- 1 Select the check box next to the target service you want to delete.
- 2 Click **Delete**.

The target service is deleted.

---


**NOTES:**

- Only locally created targets, target services, and object portfolios can be deleted. SFX prevents you from deleting targets, target services, and object portfolios provided by Ex Libris.
  - There is no rollback in KBManager. Once you confirm the deletion, all target service data is lost, including the object portfolios connected to the deleted target service.
- 

### **Configuring Institute Restrictions**

It is possible to configure a specific target to appear in the SFX menu only for certain institutes (specific user communities that have been defined in SFX). More information about configuring institute restrictions and defining institutes can be found in the **Institute Feature** section of the *SFX Advanced User's Guide*.

## Object Portfolios

To view a list of object portfolios for a target, click the **Portfolio** button  next to the target whose object portfolios you want to view. The List of Object Portfolios window opens:

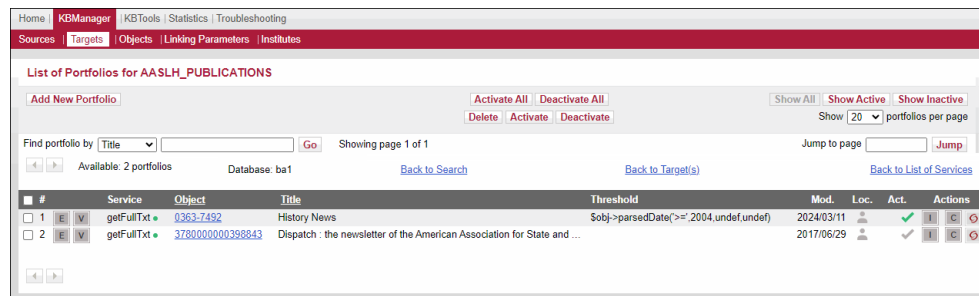








Figure 42: List of Portfolios

The Navigation bar contains the following sections:






- **Find portfolio by** – Search for a portfolio based on one of the following:
  - Title
  - ISSN
  - ISBN
  - Object ID
- **Jump to page** – Jump to a specific page.
- **Available** – The number of portfolios in the table.
- **Database** – The name of the database in which you are currently working.
- **Back to Search** – Move back to the target search results
- **Back to Targets** – Move back to the List of Targets.
- **Back to List of Services** – Move back to the List of Services.

The lower part of the work area displays the available object portfolios. Each row of this table is structured in the following way:

-  **Check box** – Select a check box next to a source to mark the source for deletion.
-  **Edit button** – Click to edit the portfolio.
-  **View button** – Click to view the portfolio.
- **Service** – The name of the target service
- **Object** – The ISSN or ISBN of the object
- **Title** – The title of the object

- **Threshold** – The active threshold. In most cases, the global threshold is displayed, unless the local threshold field contains local information specific to the institution's digital environment.
- **Modified** – The date on which the item was last modified. This date is updated when the item is changed by the customer, or by Ex Libris as part of the global KnowledgeBase update.
- **Local** – One of the following icons is displayed:
  -  Global – part of the global KnowledgeBase created and maintained by Ex Libris
  -  Localized – global item with a local threshold, and/or parse\_param added by the customer for either default or institute or with a Authentication Note and/or a General Note added by the customer.
  -  Local – locally created by the customer

If the icon has a pencil, an internal description exists for the portfolio.

-   Active/Inactive indicator – Click to toggle the activation status indicator for the item. If institutes specific activations are defined, the **Institution** column appears. The Institute icon  is displayed in yellow if institute settings exist for the portfolio. (For more information about institutes, refer to the **Institute Feature** section of the *SFX Advanced User's Guide*.)
-  **Copy** button – Click to copy the object's information to create a new object.
-  **Test SFX** button – Click to generate a new SFX menu that contains a link to this object in order to test linking to it.

The sorting of the List of Object Portfolios is controlled by the following two fields of the `extra` section in the `config/sfxctrl.config` configuration file of each local instance:

- `sort_portfolio` – The field by which to sort the portfolios. Possible values are `by_title`, `object_identifier`, and `0`.
- `default_sort_portfolio_max_num` – The maximum number of portfolios on which to perform a sort. If the number of portfolios exceeds this number, no sorting is conducted initially. However, if you click the `ID` or `Title` column header, the portfolios are sorted according to your selection.

The following activities are available for object portfolios:

- **Editing Object Portfolios** on page 81
- **Viewing Object Portfolios** on page 83




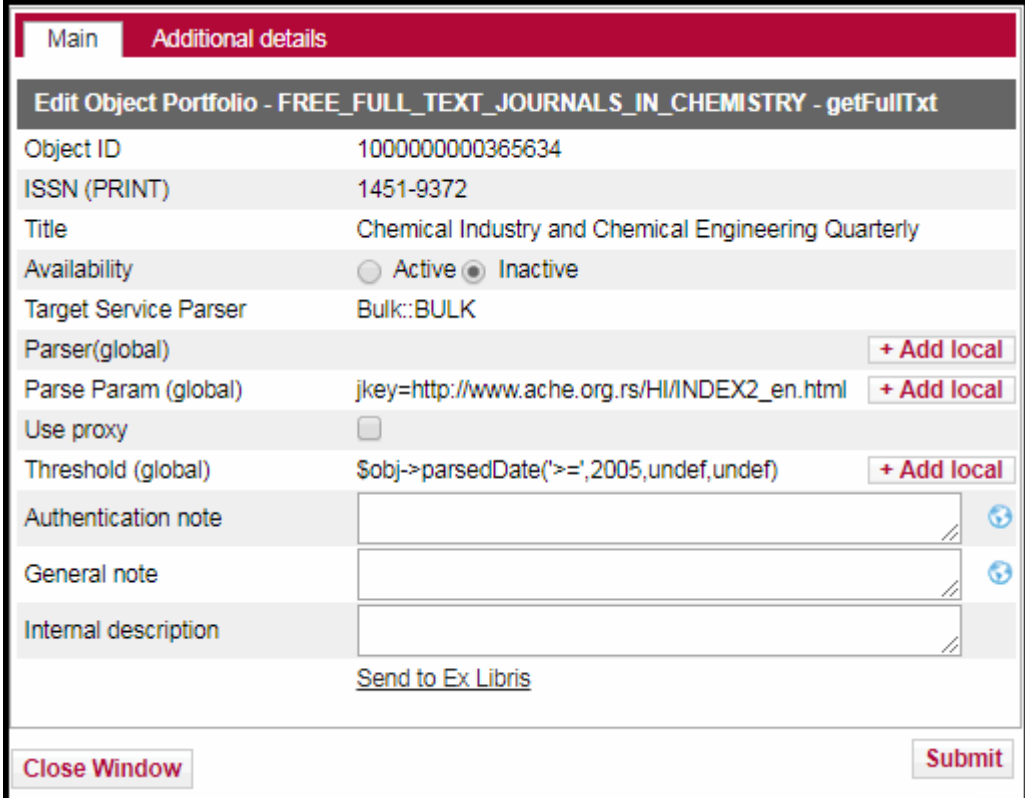
- [Activating Object Portfolios](#) on page 84
- [Deactivating Object Portfolios](#) on page 85
- [Adding Object Portfolios](#) on page 85
- [Deleting Object Portfolios](#) on page 88

### Editing Object Portfolios

You can edit an object portfolio from the List of Object Portfolios.

#### To edit an object portfolio:

- 1 Click the **Edit** button  next to the object portfolio you want to edit. The Edit Object Portfolios dialog box opens:





Main		Additional details	
<b>Edit Object Portfolio - FREE_FULL_TEXT_JOURNALS_IN_CHEMISTRY - getFullTxt</b>			
Object ID	100000000365634		
ISSN (PRINT)	1451-9372		
Title	Chemical Industry and Chemical Engineering Quarterly		
Availability	<input type="radio"/> Active <input checked="" type="radio"/> Inactive		
Target Service Parser	Bulk::BULK		
Parser(global)			<a href="#">+ Add local</a>
Parse Param (global)	jkey=http://www.ache.org.rs/II/INDEX2_en.html		<a href="#">+ Add local</a>
Use proxy	<input type="checkbox"/>		
Threshold (global)	\$obj->parsedDate('>=',2005,undef,undef)		<a href="#">+ Add local</a>
Authentication note	<input type="text"/>		
General note	<input type="text"/>		
Internal description	<input type="text"/>		
<a href="#">Send to Ex Libris</a>			
<a href="#">Close Window</a>		<a href="#">Submit</a>	

Figure 43: Edit Object Portfolio

2 Edit the fields according to the following table:

Table 6. Edit Object Portfolio

Field	Description
<b>Object</b>	The object ID
<b>ISSN</b>	The ISSN of the object
<b>Title</b>	The title of the object
<b>Availability</b>	<p>Indicates if the object portfolio is active.</p> <p>If institutes have been defined in the instance, the Institute field is displayed, indicating the activation per institute.</p> <p>For more information about institutes, refer to the <b>Institute Feature</b> section of the <i>SFX Advanced User's Guide</i>.</p>
<b>Target Service Parser</b>	Contains the name of the target parser that creates the URLs needed when linking to a particular target service. For more information, see <b>Target Parsers</b> on page 110.
<b>Parser and Parse Param</b>	Contains information that is used by the target parser to create URLs. Fill in the parameters that apply to the whole target service—for example, the base URL. For more information, see <b>Target Parsers</b> on page 110.
<b>Use Proxy</b>	Select if a proxy server needs to be used to connect to a particular object portfolio.
<b>Threshold</b>	Limitations on the availability of this object portfolio.
<b>Authentication Note</b>	<p>User authentication to be displayed in the SFX menu. For example, you can enter the user name and password needed to log on to the target. HTML tags can be used to make text italic or bold. For example:</p> <pre>Authentication needed - login:&lt;B&gt;bibuser&lt;/B&gt; - password:&lt;B&gt;xxxxxx&lt;/B&gt;</pre> <p>To assign different local authentication notes per language defined in the instance, click the Globe icon.</p>
<b>General Note</b>	<p>General information to be displayed in the SFX menu. HTML tags can be used to make text italic or bold.</p> <p>To assign different local authentication notes per language defined in the instance, click the Globe icon.</p>
<b>Internal Description</b>	Internal notes for a target. These are displayed only in the Admin Center interface.

Table 6. Edit Object Portfolio

Field	Description
Send to Ex Libris	If the information related to a portfolio has changed, you can inform Ex Libris by sending an e-mail message. The new information is then verified and included in a future update of the SFX database.

---

**NOTE:**

Some HTML/JS tags are not allowed in KBManager fields for security reasons (to prevent XSS). It is possible to disable XSS for specific fields, for example, if you want to embed license information in iframes in the SFX menu. For more information on disabling XSS, see the **XSS - Cross-Site Scripting Security Breach** section of the *SFX System Administration Guide*.

---

- 3 For additional details, click the **Additional Details** tab.
- 4 To confirm your changes, click **Submit**.

### Viewing Object Portfolios

You can view object portfolios from the List of Object Portfolios.

### To view an object portfolio:

- 1 Click the **View** button . The View Object Portfolio dialog box opens:

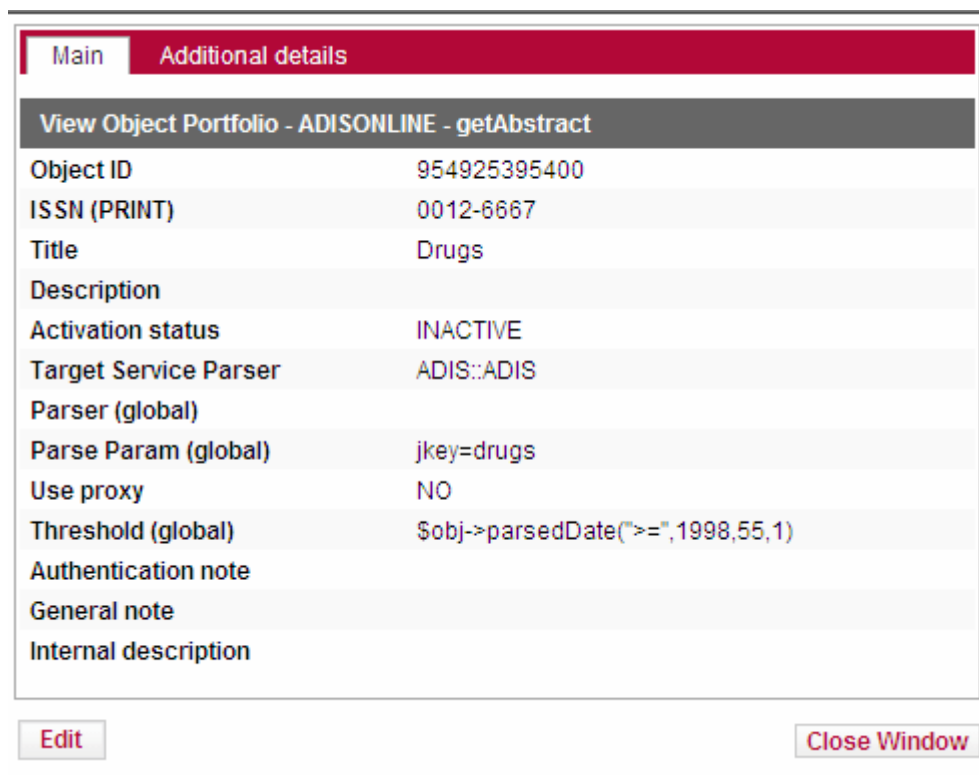




Figure 44: View Object Portfolio

- 2 To edit the object portfolio, click **Edit**. For more information on editing object portfolios, see [Editing Object Portfolios](#) on page 81.
- 3 For additional details, click the **Additional Details** tab.

### Activating Object Portfolios

Activate object portfolios if they are objects to which linking is possible. This means:

- You have a target parser that supports the service to which this object belongs.
- Your institution has the privileges to access the object portfolio.

To activate an object portfolio, click the gray arrow . The arrow becomes green . To activate all object portfolios, click **Activate All**. Alternatively, select the check boxes next to the object portfolios you want to activate and click **Activate**.

## Deactivating Object Portfolios

To deactivate an object portfolio, click the green arrow ✓. The arrow becomes gray ✓. To deactivate all object portfolios, click **Deactivate All**. Alternatively, select the check boxes next to the object portfolios you want to deactivate and click **Deactivate**.

When the last object portfolio for a particular target service is deactivated and only that target service is active for the target, the following message is displayed:

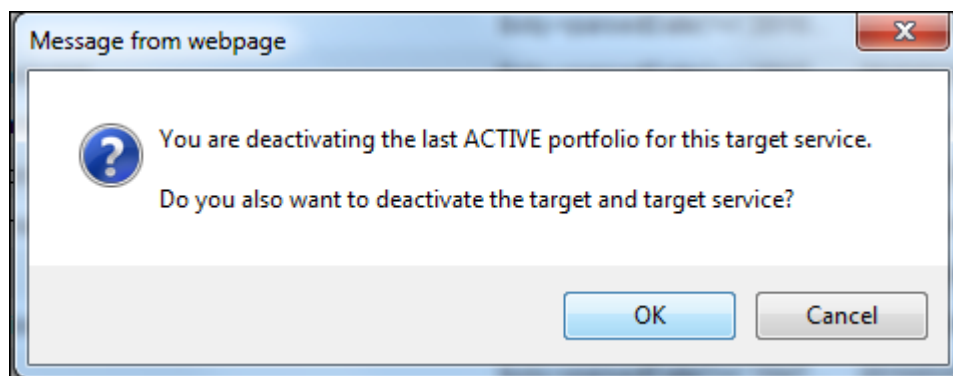


Figure 45: Warning When Deleting the Last Object Portfolio for a Target Service

## Adding Object Portfolios

You can add object portfolios to the List of Object Portfolios.

### To add an object portfolio:

- 1 Click the **Add New Portfolio** button. The Add Object Portfolio dialog box opens:

The screenshot shows the 'Add Object Portfolio' dialog box. The fields and their current values are as follows:

Field	Value
Target Service	ADISONLINE-getFullTxt (Parser=ADIS::ADIS)
Object	[Empty] [Select Object]
Description	[Empty]
Threshold	[Empty]
Parser	[Empty]
Parse Param	[Empty]
Use proxy	<input type="checkbox"/>
Authentication note	[Empty]
General note	[Empty]
Internal description	[Empty]
Activation status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Linking Level	ARTICLE

Buttons: Compose, Clear, Send to Ex Libris, Submit

Figure 46: Add Object Portfolio

- 2 Fill in the fields according to **Table 6 Edit Object Portfolio** on page 82. The target service and object fields are mandatory.

- 3 In the **Threshold** field, fill in a global threshold. Global fields are editable when you create a portfolio, because the portfolio is “owned” by the instance user.

In the future, when you are able to contribute data to the SFX global KnowledgeBase, it will be necessary to provide global threshold information that is applicable to all customers when contributing the data.


Local threshold information can be added – if it is different from the global threshold – by editing the portfolio and clicking **Add Local** for the threshold.

- 4 Select a linking level from the **Linking Level** drop-down list. The linking level is the level to which links can be created when using the specific target service or object portfolio. Certain vendors may provide linking options directly to an article, while others may provide linking only to the journal or database home page.

Linking level information can be used to select the preferred service for DirectLinking. For DirectLink configuration options, see [DirectLink](#) on page 452. Linking level information is stored in both the `TARGET_SERVICE` and `OBJECT_PORTFOLIO` tables.

The following are possible linking level values:

- Article
- Article DOI
- Book
- Citation
- Database
- Inherit
- Issue
- Journal
- Volume

You can also add a new object portfolio by clicking the **Copy** button  provided for each of the existing object portfolios. A new dialog box opens, containing information identical to the object portfolio you used as a starting point. Modify the information, if necessary.

- 5 To search for an object, click **Select Object**. For more information on searching for objects, see [Searching for Objects](#) on page 96.
- 6 To confirm your changes, click **Submit**.

The object portfolio is added.

---

**IMPORTANT:**

When adding a new object portfolio, be sure to check whether the target parser in your SFX instance supports this object and ensure that you have all the information needed to link to it (for more information, see **Target Parsers** on page 110).

Instead of adding the object portfolio locally, you can ask Ex Libris to include it in a future update.

---

### **Deleting Object Portfolios**

You can delete object portfolios from the List of Object Portfolios.

#### **To delete an object portfolios:**

- 1 Select the check box next to the object portfolio you want to delete.
- 2 Click **Delete**.

The object portfolio is deleted.

---

**NOTES:**

- Only locally created targets, target services, and object portfolios can be deleted. SFX prevents you from deleting a target, target service, and object portfolio provided by Ex Libris.
  - There is no rollback in KBManager. Once you have confirmed the deletion, all object portfolio data is lost.
- 

## **Objects**

This section contains the following:

- **Objects Overview** on page 89
- **Searching for Objects** on page 96
- **Viewing Objects** on page 101
- **Editing Object Details** on page 101
- **Viewing Object Portfolios** on page 105
- **Activating Object Portfolios with OneClick Activation** on page 106
- **Testing the SFX Menu** on page 106
- **Adding an Object** on page 107



- **Customer Contributions** on page 108

## **Objects Overview**

The object-related tables in the SFX KnowledgeBase store objects and information (or metadata) about objects.

The following table lists the data fields available for objects:

Table 7. Object Fields

Item	Description
<b>Language</b>	The language in which the object is written.
<b>Peer Reviewed</b>	Indicates whether the object is peer reviewed.
<b>Object_Type</b>	<ul style="list-style-type: none"> <li>■ SERIALS               <ul style="list-style-type: none"> <li>■ CONFERENCE</li> <li>■ JOURNAL</li> <li>■ NEWSPAPER</li> <li>■ SERIES</li> <li>■ TRANSCRIPT</li> <li>■ WIRE</li> <li>■ DATABASE</li> </ul> </li> <li>■ MONOGRAPHS               <ul style="list-style-type: none"> <li>■ BOOK</li> <li>■ CD</li> <li>■ DISSERTATION</li> <li>■ DOCUMENT</li> <li>■ MANUSCRIPT</li> <li>■ PROCEEDING</li> <li>■ REPORT</li> <li>■ VIDEO</li> <li>■ AUDIO</li> <li>■ SCORE</li> </ul> </li> </ul>
<b>Main</b>	<p>The full title of the object. For Chinese objects, there are two types of Main titles:</p> <ul style="list-style-type: none"> <li>■ MAIN SIMPLIFIED</li> <li>■ MAIN TRADITIONAL</li> </ul>

Table 7. Object Fields

Item	Description
<b>Secondary</b>	<p>A secondary title of the object:</p> <ul style="list-style-type: none"> <li>■ TRANSLATION</li> <li>■ ABBREVIATION</li> <li>■ UNIFORM</li> <li>■ ROMANIZATION - Pinyin (for Chinese)</li> <li>■ WRITING_SYSTEM - Hangul (for Korean)</li> <li>■ WRITING_SYSTEM - Hiragana (for Japanese)</li> </ul>
<b>Non-filing Character</b>	The character of the title to consider for sorting.
<b>Language (Title)</b>	The language into which the title is translated. Available when secondary title type is translation.
<b>ISSN (PRINT) (for serials)</b>	<p>The ISSN number. When adding an ISSN value to the SFX KnowledgeBase, SFX performs the following validation and normalization procedure:</p> <ol style="list-style-type: none"> <li>1 All hyphens and uppercase letters are removed from the string.</li> <li>2 The value is checked to see whether it consists of either 8 or 7 plus X. <ul style="list-style-type: none"> <li>■ If this check fails, the incoming ISSN is rejected and not stored in the SFX database.</li> <li>■ If the check passes, perform the ISBS checksum test.</li> </ul> </li> </ol> <p>Regardless of whether or not the ISSN checksum test passes or fails, SFX stores the ISSN in the SFX database, except if SFX finds that an identical ISSN already exists in the database.</p>
<b>eISSN (for serials)</b>	The eISSN number for electronic material.

Table 7. Object Fields

Item	Description
<b>ISBN (for monographs)</b>	<p>The ISBN number (for monographs). When adding an ISBN value to the SFX KnowledgeBase, SFX performs the following validation and normalization procedure:</p> <ol style="list-style-type: none"> <li>1 All hyphens and uppercase letters are removed from the string.</li> <li>2 The value is checked to see whether it consists of either 10 or 13 digits or 9/12 digits plus X.           <ul style="list-style-type: none"> <li>■ If this check fails, the incoming ISBN is rejected and not stored in the SFX database.</li> <li>■ If the check passes, perform the ISBN checksum test.</li> </ul> </li> </ol> <p>If the ISBN checksum test passes, include the correct hyphenation and save it in the database.</p> <p>If the ISBN checksum test fails, keep the value without hyphenation and save it as is in the database.</p> <hr/> <p><b>NOTE:</b>            When the ISBN is displayed in the List of Objects and List of Object Portfolio pages, the 13 digit version is displayed. In the View Object and Edit Object pages, both the 10 digit and 13 digit versions are displayed.</p> <hr/> <p>When storing ISBNs in the SFX database:</p> <ul style="list-style-type: none"> <li>■ ISBN-10 values are stored in the SFX database in ISBN-10 format.</li> <li>■ ISBN-13 values starting with 978 are converted to ISBN-10 and stored in the SFX database in ISBN-10 format.</li> <li>■ ISBN-13 values starting with 979 are stored in the SFX database in ISBN-13 format.</li> </ul> <p>If SFX finds that an identical ISBN already exists in the database with the same type (print, electronic, or incorrect), the ISBN is not added.</p>
<b>eISBN (for monographs)</b>	The eISBN number for electronic material.
<b>LCCN</b>	The Library of Congress Control Number. The SFX KB stores the canonical version of the LCCN – including spaces, prefixes, and suffixes.

Table 7. Object Fields

Item	Description
OCLC	The OCLC control number.
CODEN (for serials)	The CODEN number.
DOI (for monographs)	The digital object identifier number.
ZDB_ID (for serials)	The identifier as assigned by the ZDB-Katalog (Zeitschriftendatenbank).  <b>NOTE:</b> This ID can be added only by Ex Libris for global objects and cannot be used for searching. It is displayed only in the KBManager > View Object window.
Author (for monographs)	The author of the object.
LOCAL	Indicates whether the object is local or global.
Publisher Name	The name of the publisher of the object.
Place of Publication	The place where the object was published.
Edition	The edition of the object (The value can be either text or a numerical value, for example – Third edition or 3rd ed.)
Date of Publication	The date on which the object was published.

Table 7. Object Fields

Item	Description
<b>Relation</b> (See Table 8 Relation Types Used in SFX on page 95 for an explanation of each relation)	<ul style="list-style-type: none"> <li>■ Proceeding Series</li> <li>■ Proceeding Item</li> <li>■ Other Edition</li> <li>■ Series</li> <li>■ Series Item</li> <li>■ Continues</li> <li>■ Continued By</li> <li>■ Continues In Part</li> <li>■ Continued In Part By</li> <li>■ Merged Into</li> <li>■ Formed by the Union of</li> <li>■ Split Into</li> <li>■ Absorbed By</li> <li>■ Absorbed</li> <li>■ Absorbed in Part By</li> <li>■ Absorbed in Part</li> <li>■ Related</li> <li>■ Supplement / Supplement Parent</li> <li>■ Translation Entry</li> </ul>
<b>Categories</b>	The categories with which the object has been associated.
<b>Subcategories</b>	The sub-categories with which the object has been associated.
<b>Additional Data</b>	Additional data of the object: <ul style="list-style-type: none"> <li>■ Owner</li> <li>■ Created by</li> <li>■ Object record last updated by</li> <li>■ Last localization change by</li> <li>■ Latest release this object was included in</li> </ul>

The following table describes the relation types used to describe the relationships between objects in SFX.

Table 8. Relation Types Used in SFX

Relation	Description	Relation as Stored in the SFX DB KB_RELATION Table
<b>Proceeding Series</b>	The proceeding series of which the main object is a part.	PROCEEDING_SERIES
<b>Proceeding Item</b>	The proceeding publication part of the main object.	PROCEEDING_ITEM
<b>Other Edition</b>	Different edition of the same journal (this is used in case of different language or different place of publication).	OTHER_EDITION
<b>Other Book Edition</b>	Different edition of the same book (printed in the same language).	OTHER_BOOK_EDITION
<b>Continues</b>	The discontinued publication that is continued by the object.	CONTINUES
<b>Continued By</b>	A publication that continues the object.	CONTINUED_BY
<b>Continues In Part</b>	A discontinued publication that is partially continued by the object.	CONTINUES_IN_PART
<b>Continued In Part By</b>	A publication that partially continues the object.	CONTINUED_IN_PART_BY
<b>Merged Into</b>	A publication into which the object has been merged.	MERGED_INTO
<b>Formed by the Union of</b>	The main object consists of the contents of a union of several previous publications.	FORMED_BY_THE_UNION_OF
<b>Split Into</b>	The publications into which the object is split.	SPLIT_INTO
<b>Absorbed By</b>	The publication into which the object has been absorbed.	ABSORBED_BY
<b>Absorbed in Part by</b>	The publication into which the object has been partially absorbed	ABSORBED_IN_PART

Table 8. Relation Types Used in SFX

Relation	Description	Relation as Stored in the SFX DB KB_RELATION Table
<b>Related</b>	General Relation. Used previously in SFX (deprecated). Not updated from the Library of Congress.	RELATED
<b>Supplement</b>	The publication that supplements the object.	SUPPLEMENT
<b>Supplement Parent</b>	The publication that is supplemented by the object.	SUPPLEMENT_PARENT
<b>Translation Entry</b>	Multilingual versions of the object.	TRANSLATION_ENTRY
<b>Series</b>	The publication that is the series title under which the object has been published.	SERIES
<b>Series Item</b>	The publication that is part of the series object.	SERIES_ITEM

## Searching for Objects

You can search for objects in the SFX database.



**To search for an object:**

- 1 From the KBManager section of the Data Management area, click **Objects**. The Search Objects window opens:

The screenshot shows the 'Search objects' interface. At the top, there is a navigation menu with 'Home', 'KBManager', 'KBTools', 'Statistics', and 'Troubleshooting'. Below this is a secondary menu with 'Sources', 'Targets', 'Objects', 'Linking Parameters', and 'Institutes'. The main content area is titled 'Search objects' and features an 'Add Object' button. Below the button, there are three search criteria: 'Title' with a dropdown menu showing 'begins', an empty text input, and an 'and' dropdown; 'ISSN' with an empty text input, a 'Remove' button, and an 'Add Condition' button; and 'ISBN' with an empty text input, a 'Remove' button, and an 'Add Condition' button. At the bottom are 'Clear Search' and 'Search' buttons.

Figure 47: Search Objects

By default, three drop-down lists are displayed.

**NOTE:**

You can configure which identifiers are available from the drop-down lists from the `admin.config` configuration file.

- 2 From the drop-down lists, select one of the following identifiers:
  - **Title** – Selecting this identifier displays a drop-down list with the following options:
    - starts with
    - contains
    - exact

**NOTE:**

Exact searches for CJK titles behave like a Starts With search for titles longer than 42 characters. This is because title search keys for CJK characters are limited to 255 characters (where each CJK character after normalization requires 6 characters).

The search is performed for all title types (main, abbreviated, and so forth)

- ISSN – The search is performed for all types (electronic, incorrect, and print) and can be with or without dashes
- ISBN – The search is performed for all types (electronic, incorrect, and print) and can be with or without dashes.
- CODEN – The search is performed for a complete six-character string or using right truncation.
- DOI – The search is performed for an exact match, no truncation.
- LCCN – The search is performed for an exact match, no truncation.
- OCLC – The search is performed for an exact match, no truncation.
- Publisher – The search is performed for a complete or partial publisher name (by using a contains search).
- Place of Publication – The search is performed for a complete or partial publication place (by using a contains search).
- OBJECT\_ID – The search is performed for an exact match, no truncation.
- Object Type – From the drop-down list, select an object type.
- Object Language – From the drop-down list, select a language.
- LOCAL– The search is performed for a complete LOCAL value or using right truncation
- Category – From the drop-down list, select a category.
- Author Personal – The search is performed for an exact match, no truncation.
- Author Corporate – The search is performed for an exact match, no truncation.
- Author Meeting – The search is performed for an exact match, no truncation.

---

**NOTE:**

Truncation is performed by entering the beginning of the search term, followed by an asterisk (\*).

---

- 3 Depending on the identifier you choose, another drop-down list or text box opens. From the drop-down list, select an item and enter text in the text box.
- 4 To add additional conditions to the search, click **Add Condition**.
- 5 Click **Search**.



The List of Search Results window opens with the search results:

#	ID	TITLE	Author	Date	Type	Local	OP
1	1045-0831	Story			JOURNAL		P
2	0081-587X	Story			JOURNAL		P
3	0883-7678	Story			JOURNAL		P
4	0165-5078	Story			JOURNAL		P
5	978-0-299-15933-7	Story	Scheub, Harold	1998	BOOK		P
6	978-0-310-26992-2	The Story	Zondervan Bible P...	2005	BOOK		P
7	978-0-313-33430-6	Story: A Handbook	Thursby, Jacquelin...	2006	BOOK		P
8	2325-1441	Story			JOURNAL		P
9	978-1-4412-0210-9	Story : Recapture the Mystery	James, Steven	2006	BOOK		P
10	978-1-938297-14-4	The Story : An Interwoven Gospel	Fincher, David	2012	BOOK		P
11	978-1-4412-3854-2	Story : Recapture the Mystery	James, Steven	2012	BOOK		P
12	978-1-78185-360-3	The Story	Hislop, Victoria	2013	BOOK		P
13	978-1-78185-731-1	The Story: The Lives Of Women	Hislop, Victoria	2013	BOOK		P
14	978-1-78185-729-8	The Story: Love	Hislop, Victoria	2013	BOOK		P
15	978-1-78185-730-4	The Story: Loss	Hislop, Victoria	2013	BOOK		P
16	2333-3146	Story			JOURNAL		P
17	978-1-322-39050-5	Story: Life	Hislop, Victoria		BOOK		P
18	978-1-322-39058-1	Story: Love	Hislop, Victoria		BOOK		P
19	978-1-909844-18-6	Story : The Library of Wales Short Story Anthology	Smith, Dai	2014	BOOK		P
20	978-1-909844-20-9	Story : The Library of Wales Short Story Anthology	Smith, Dai	2014	BOOK		P

Figure 48: List of Search Results

Each row of this table is structured in the following way:

- **V** **View** button – Click to view object details.
- **E** **Edit** button – Click to edit object details.
- **D** **Delete** button – Click to delete objects (local objects only).
- **ID** – The value displayed is determined by the following order of priority:
  - ISSN
  - ISBN
  - LCCN
  - OCLC
  - CODEN
  - DOI
  - LOCAL
  - OBJECT\_ID
- **Title** – The title of the object.
- **Author** – The author of the object (if available).

- **Date** – The date of publication. Available only for monograph type objects (such as books), but not for serial type objects (such as journals).
- **Type** – The type of the object.
- **Local** – Indicates whether the object is global, localized, or local.
- **OP** – A green dot ● is displayed if the object contains active object portfolios.
-  – Click to display the List of Portfolios.
-  – Click to display the SFX menu.

To sort the results, click **ID** or **Title**. By default, the results are sorted by ID.

When sorting by ID, if the list consists of IDs from different identifiers, the list first sorts by like identifier (ISSN, ISBN, and so forth) and then by ID within the identifier.

## Viewing Objects

You can view an object from the List of Search Results.

### To view an object:

- 1 Click the **View** button **V** next to the object you want to view or click the object's title. The View Object window opens:

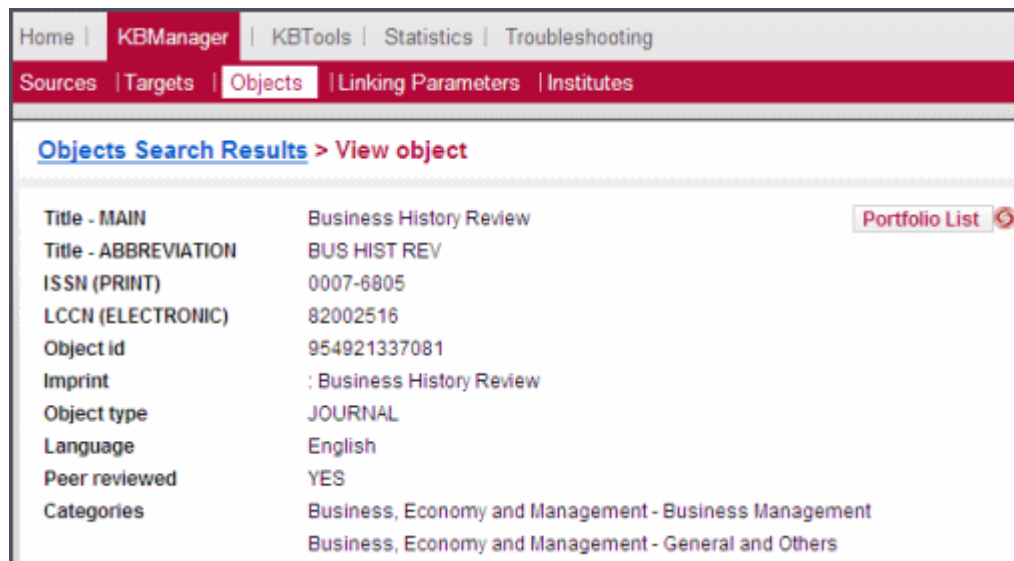


Figure 49: View Object Details

For an explanation of the fields in the View Object Details dialog box, see [Table 7 Object Fields](#) on page 90.

- 2 Click **Portfolio List** to see the List of Portfolios of the object. For more information, see [Object Portfolios](#) on page 79.

## Editing Object Details

You can edit an object in the List of Search Results.

### To edit an object:

- 1 Click the **Edit** button **E** next to the object you want to edit.
  - If the object is global, the following window opens:

**ExLibris SFX**  
Home | **KBManager** | KBTools | Statistics | Troubleshooting

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

[Objects Search Results](#) > **Edit object**

<b>Title - MAIN</b>	History of France from the Origin of That Nation to the Year 1702
<b>Title - ALTERNATIVE</b>	History of France from the Origin of That Nation to the Year 1702.
<b>Object ID</b>	2470000000004258
<b>Object type</b>	BOOK
<b>Language</b>	English
<b>Peer reviewed</b>	NO

Local Identifier

Local Title

**MAIN**  **Non-Filing Character**

Local Author

**Add Author**

Additional data

**Cancel** **Save**

Figure 50: Edit Global Object

The global object attributes are not editable.

- a You can add the following local information to the object:
  - Local identifier
  - Local title
  - Non-filing character

- Local Author (see the following step)
- b Click **Add Author** to add local author information to the object. The following is displayed:

Figure 51: Add Local Author

- c Add the following information:
  - Type – Personal, Corporate, or Meeting
  - Last Name
  - First Name/Initials
  - Additional, Main, or Alternative
- d Click **Save**. The local author is displayed when viewing the object details:

Figure 52: View Local Author Details

- e To display additional data, click .

- If the object is local, the following window opens:

Home | KBManager | KBTools | Statistics | Troubleshooting

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

[Search Objects](#) > Edit object (Local Object)

[954921337081] [Portfolio List](#)

**General**

Language: English Peer Reviewed:  OBJECT\_TYPE: JOURNAL

**Titles**

MAIN: Business History Review Non-Filing Character: 0  
Abbreviation: BUS HIST REV Non-Filing Character:  [Remove](#) [Add Title](#)

**Translations**

[Add Translation](#)

**Identifiers**

ISSN (PRINT): 0007-6805 [Remove](#)  
LCCN (ELECTRONIC): 82002516 [Remove](#) [Add Identifier](#)

**Imprint**

Publisher Name: Business History Review Place of Publication:

**Relations**


Figure 53: Edit Local Object

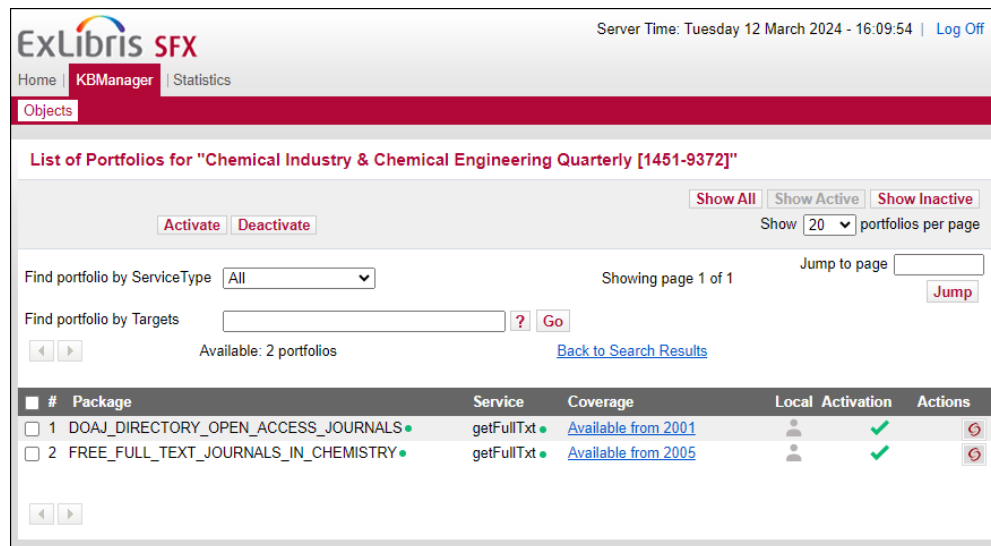
- 2 Edit the object details according to [Table 7 Object Fields](#) on page 90.
- 3 To confirm your changes, click **Save**.



## Viewing Object Portfolios

You can view object portfolios in the List of Search Results.

To view the object portfolios for the object, click the **Portfolio** button . The List of Portfolios window opens:



The screenshot shows the 'List of Portfolios' window for the object 'Chemical Industry & Chemical Engineering Quarterly [1451-9372]'. The window includes a header with the ExLibris SFX logo and navigation links. Below the header, there are buttons for 'Activate' and 'Deactivate', and a 'Show' dropdown set to '20 portfolios per page'. There are also search filters for 'ServiceType' (set to 'All') and 'Targets'. The main content is a table with the following data:

#	Package	Service	Coverage	Local	Activation	Actions
1	DOAJ_DIRECTORY_OPEN_ACCESS_JOURNALS	getFullTxt	Available from 2001			
2	FREE_FULL_TEXT_JOURNALS_IN_CHEMISTRY	getFullTxt	Available from 2005			

Figure 54: List of Portfolios

SFX displays the targets, services, and thresholds of the object. Active targets and target services have a green dot displayed next to them. For more information on object portfolios, see **Object Portfolios** on page 79.

### NOTES:

- To define the default number of object portfolios displayed in the List of Portfolios, refer to the **config/admin.config** section of the *SFX Advanced User's Guide*.
- When displaying the list of portfolios for a particular object, the following filtering options exist:  
 Find portfolio by Service Type – select one of the following options from the drop-down list: All, getFullTxt, getSelectedFullTxt, GetAbstract, getTOC  
 Find portfolio by Targets – enter the name or part of the name of a target or subtarget  
 You can use both filters together. A boolean AND is used to combine the two filters.

## Activating Object Portfolios with OneClick Activation

When activating an object portfolio, if its target or target service are not activated, the following message is displayed:

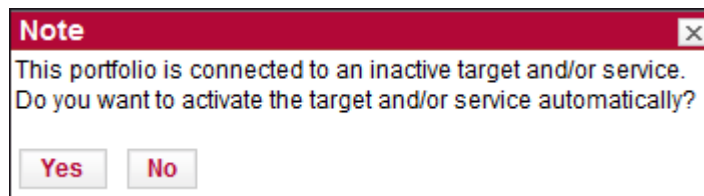


Figure 55: OneClick Activation

To activate the target and target service, enter `y`.

If there are linking parameters for a target service, but the value is missing, the object portfolio cannot be activated and the following message is displayed:

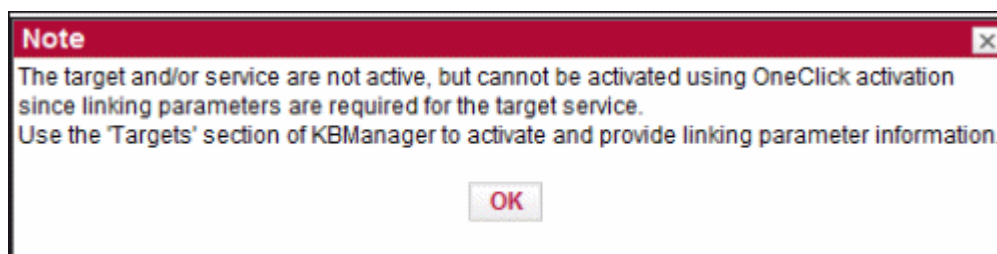


Figure 56: OneClick Activation Error Message

## Testing the SFX Menu

To test how the object looks in the SFX menu, click the **SFX** button  next to an object. For example:

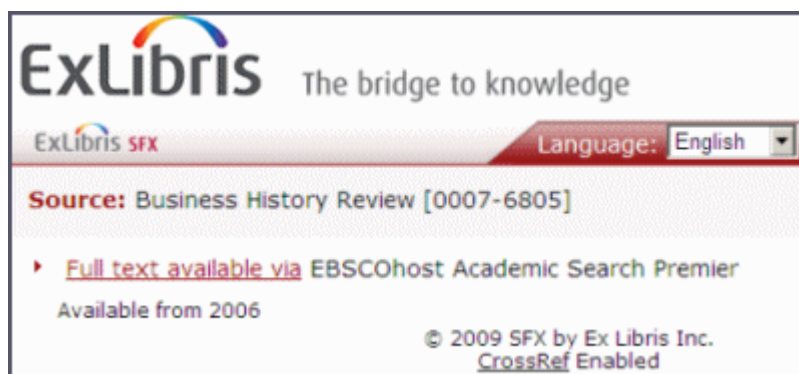


Figure 57: Test SFX Menu

## Adding an Object

You can add an object to the local `OBJECT` table.

### To add an object:

- 1 Click **Add Object** from the List of Search Results. The Add Object window opens:

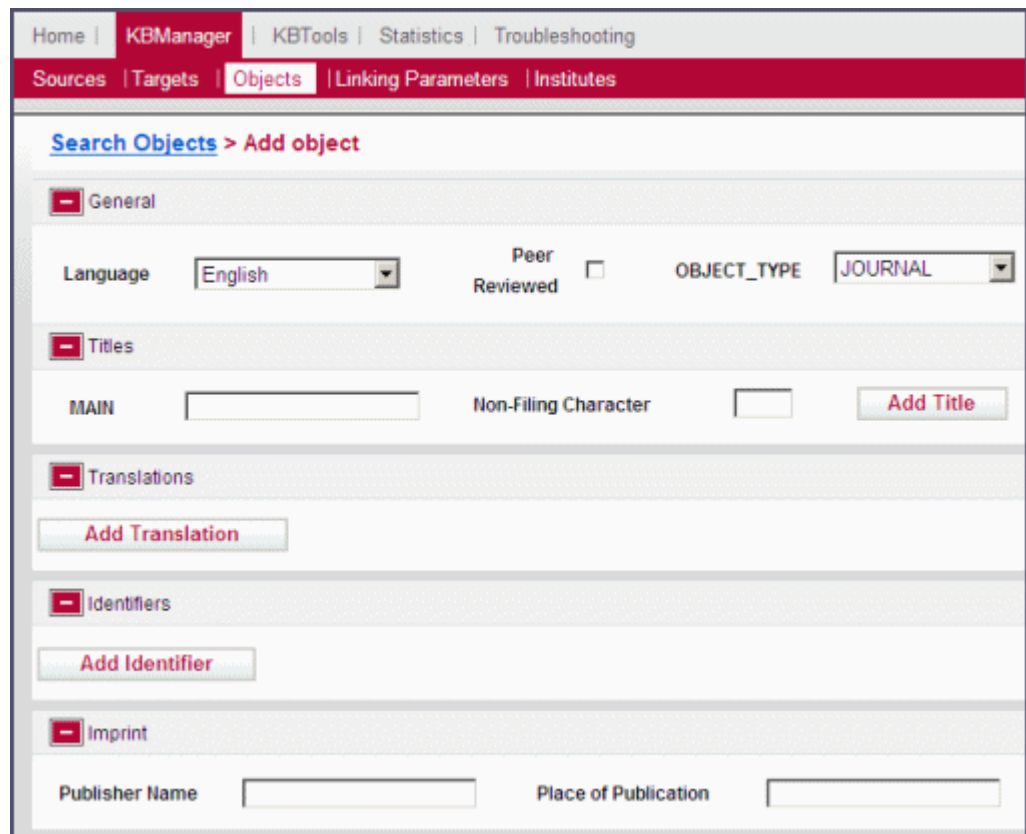


Figure 58: Add Object

The Add Object window is dynamic. The fields vary according to the language selected (for example, the **Titles** fields) and the object type selected (for the **Identifiers**, **Imprint**, and **Authors** fields).

### NOTE:

For Japanese titles, SFX automatically adds Hiragana for Katakana and the reverse, so there is no need to add the additional title manually.

- 2 Fill in the fields as described in **Table 7 Object Fields** on page 90.
- 3 To confirm your changes, click **Save**.

## Customer Contributions

---

### NOTE:

To enable the Customer Contributions feature, provide your Salesforce CRM credentials as described in the Troubleshooting and Debugging > Configuring Contact Support section of the *SFX Advanced Users Guide*. Additionally, the Customer Contribution feature has to be enabled for the SFXAdmin user as described in the User Administration > Configuring Customer Contributions section of the *SFX Advanced Users Guide*.

---

You can contribute changes to the SFX global knowledgebase for the following targets in the SFX KnowledgeBase:

- MISCELLANEOUS\_EJOURNALS
- MISCELLANEOUS\_FREE\_EJOURNALS
- MISCELLANEOUS\_EBOOKS
- MISCELLANEOUS\_FREE\_EBOOKS
- US\_GOVERNMENT\_DOCUMENTS\_FREE

The following changes can be contributed for these targets:

- updates to thresholds or parse params of object portfolios
- new object portfolios

The information contributed to the SFX KnowledgeBase should be applicable to all customers. Portfolios with data that is only locally relevant (for example, local coverage or local linking information) should not be contributed.

The user profile you use must be configured to allow contributions. For more information, see the **Configuring Customer Contributions** section of the *SFX Advanced User's Guide*.

The **Contribute** button is displayed when you view object portfolios that have been changed:

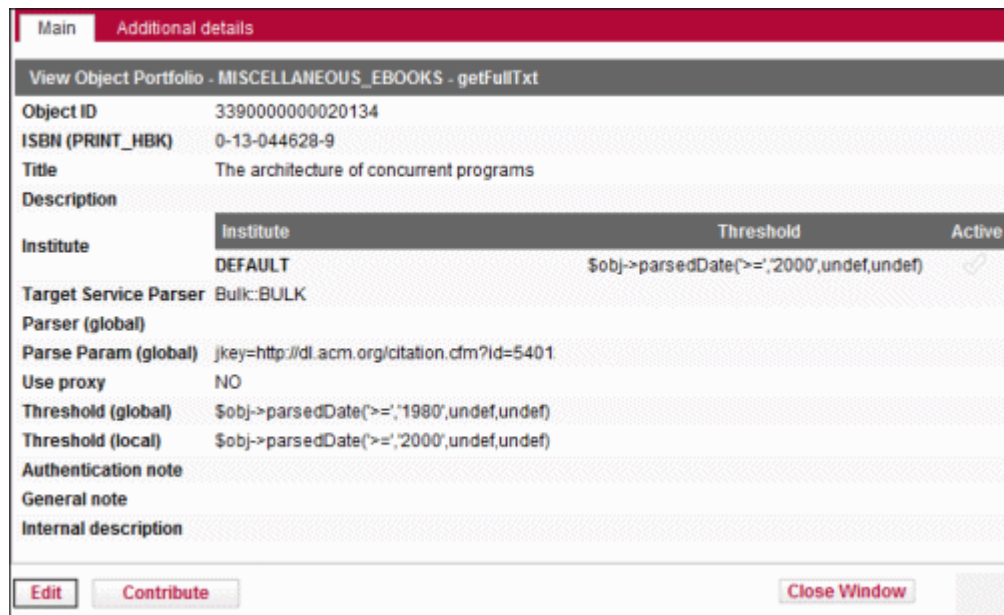


Figure 59: Contribute Button

Click the **Contribute** button to contribute the change. This creates a CRM case for evaluation by the content team. You are notified by email when the change is included in the SFX CKB or if the contribution is rejected.

To ensure that you can use the Customer Contributions feature, provide your Salesforce CRM credentials by following the instructions described in the *Troubleshooting and Debugging > Configuring Contact Support* section of the *SFX Advanced Users Guide*.

## Linking Parameters

This section includes:

- [Linking Parameters Overview](#) on page 109
- [Editing Linking Parameters](#) on page 113
- [Adding Linking Parameters](#) on page 113

### Linking Parameters Overview

In order to understand the function of linking parameters, it is important to first understand the function of target parsers and target URLs.

- [Target Parsers](#) on page 110

- [Target URLs](#) on page 111
- [Parse Param](#) on page 111

### Target Parsers

SFX builds the target URL using the target parser program, which uses information stored in the **Parse Param** field. The target parser program creates a URL to go to a specific place on the Internet, such as, for example, a publisher's Web site or the abstract of a particular journal article. In the SFX environment, each target service and object portfolio uses a target parser to create a URL to which the target service and object portfolio resolve.

In the SFX database, the name of the target parser associated with any target is stored in the **Parser** field of the target service and object portfolio.

The **Parser** field of each target service must be filled in.

The **Parser** field of object portfolios is usually empty. This means that the object portfolio inherits the parser from the target service to which it is connected.

You need to fill in the **Parser** field in the object portfolio only if you want to create a new object portfolio for which the target service parser does not work.

The following is an example of a target service with two object portfolios:

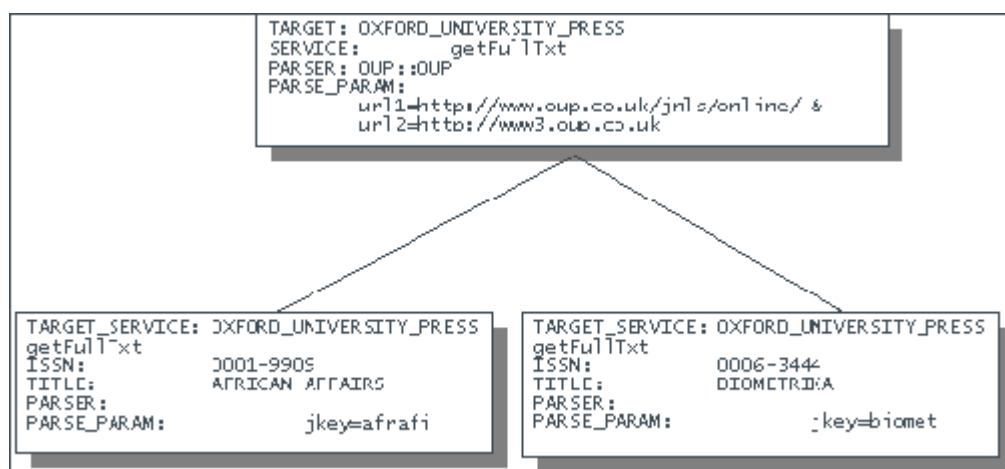


Figure 60: Target Service with Two Object Portfolios

The following information must be provided before a target parser program can construct a URL:

- The URL structure required by the target service.
- Some information or parameters that are specific to the specific target service or object portfolio.

- The URL structure information is contained in the target parser. The parameters, on the other hand, are stored in the **Parse Param** field in the SFX database.

### Target URLs

When discussing target parsers, it is important to know how the URL for a particular target service or object portfolio is constructed. The following is an example of a URL structure and its components:

The American Chemical Society getFullTxt target service contains the journal *Accounts of Chemical Research* (ISSN 0001-4842). If you link to this journal directly, the URL in the address bar is:

<http://pubs3.acs.org/acs/journals/toc.page?incoden=achre4>

In this case, the URL is divided into two parts:


- The first part is the same for each journal in this particular target service. It is the base URL for this target service. In this example, the base URL is <http://pubs3.acs.org/acs/journals/toc.page>.
- The second part of the URL is used to identify this specific journal. Therefore, this part is used as the journal key or jkey. In this example, the jkey is achre4.

The American Chemical Society also allows you to go to the issue level of a journal. This means you can go to a specific issue of this journal—for example, volume 33, issue 1. The URL in this case is:

<http://pubs.acs.org/subscribe/journals/achre4/jtoc.cgi?achre4/33/1>

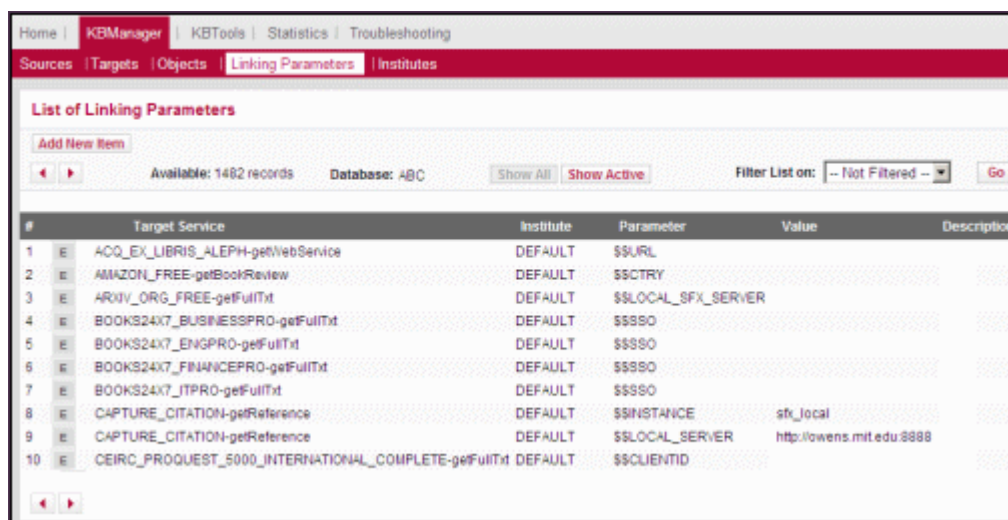
The information about the specific volume and issue are now added as part of the URL structure.

### Parse Param

The parse param contains variables, called linking parameters, for items such as the user name and password that may differ between institutes. These variables begin with \$\$ in the parse param. The values of these parameters are set by clicking the **Linking Parameter** button  from the List of Target Services or from the Linking Parameters tab. Linking parameters are used in two ways:

- For single site setup – to store library-specific authentication and server information necessary to link to specific targets.
- For a multi-site setup – to store library-specific authentication and server information necessary to link to specific targets for each of the institutions using the SFX instance.

To display a list of linking parameters, from the KBManager section of the Data Management area, click **Linking Parameters**. The List of Linking Parameters window opens:



#	Target Service	Institute	Parameter	Value	Description
1	E ACC_EX_LIBRIS_ALEPH-getWebService	DEFAULT	\$\$URL		
2	E AMAZON_FREE-getBookReview	DEFAULT	\$\$CTRY		
3	E ARXIV_ORG_FREE-getFullTxd	DEFAULT	\$\$LOCAL_SFX_SERVER		
4	E BOOKS24X7_BUSINESSPRO-getFullTxd	DEFAULT	\$\$SSO		
5	E BOOKS24X7_ENGPRO-getFullTxd	DEFAULT	\$\$SSO		
6	E BOOKS24X7_FINANCEPRO-getFullTxd	DEFAULT	\$\$SSO		
7	E BOOKS24X7_ITPRO-getFullTxd	DEFAULT	\$\$SSO		
8	E CAPTURE_CITATION-getReference	DEFAULT	\$\$INSTANCE	stx_local	
9	E CAPTURE_CITATION-getReference	DEFAULT	\$\$LOCAL_SERVER	http://owens.mit.edu:8888	
10	E CEIRC_PROQUEST_5000_INTERNATIONAL_COMPLETE-getFullTxd	DEFAULT	\$\$CLIENTID		

Figure 61: List of Linking Parameters

The navigation bar contains the following sections:

- **Add New Item** – Click to add a new linking parameter.
- **Available** – the number of available linking parameters
- **Database** – The name of the database in which you are currently working
- **Show all** – Displays all linking parameters, regardless of the activation status of the target and target services
- **Show Active** – Displays only the linking parameters whose target and target services are both active for either the default or one of the institutes/ groups defined in the instance
- **Filter List on** – From the drop-down list, select one of the following to filter the List of Linking Parameters:
  - **Institute**
  - **Target Service**
  - **Flag Name**
- **Select Institute** – From the drop-down list, select an institute to edit the values of the parameters of this institute.

Each row of the table is structured in the following way:

- **E** Edit button – Click to edit the parameter.
- **Target Service** – The name of the target service




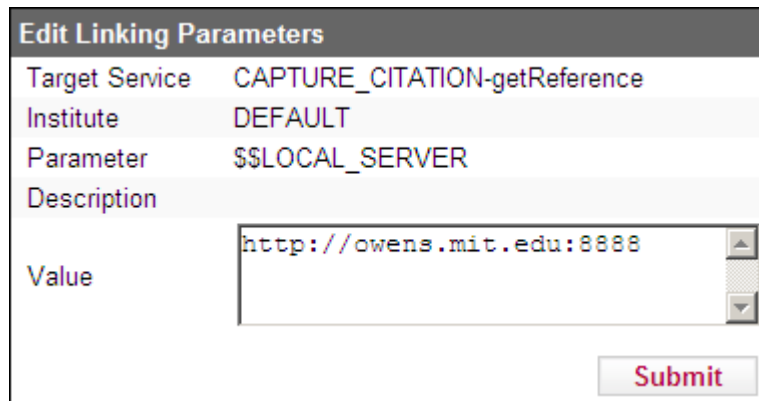
- **Institute** – The name of the institute for which the parameter exists
- **Parameter** – The text of the parameter
- **Value** – The value of the parameter
- **Description** – A description of the parameter

## Editing Linking Parameters

You can edit linking parameters from the List of Linking Parameters.

### To edit linking parameters:

- 1 Click the **Edit** button  next to the linking parameter you want to edit. The Edit Linking Parameters dialog box opens:



Edit Linking Parameters	
Target Service	CAPTURE_CITATION-getReference
Institute	DEFAULT
Parameter	\$\$LOCAL_SERVER
Description	
Value	<input type="text" value="http://owens.mit.edu:8888"/>
<input type="button" value="Submit"/>	

Figure 62: Edit Linking Parameters

- 2 Edit the value of the linking parameter.
- 3 To confirm your changes, click **Submit**.

## Adding Linking Parameters

You can add a new linking parameter to the List of Linking Parameters.

### To add a new linking parameter:

- 1 Click **Add New Item**. The Add Linking Parameters dialog box opens:

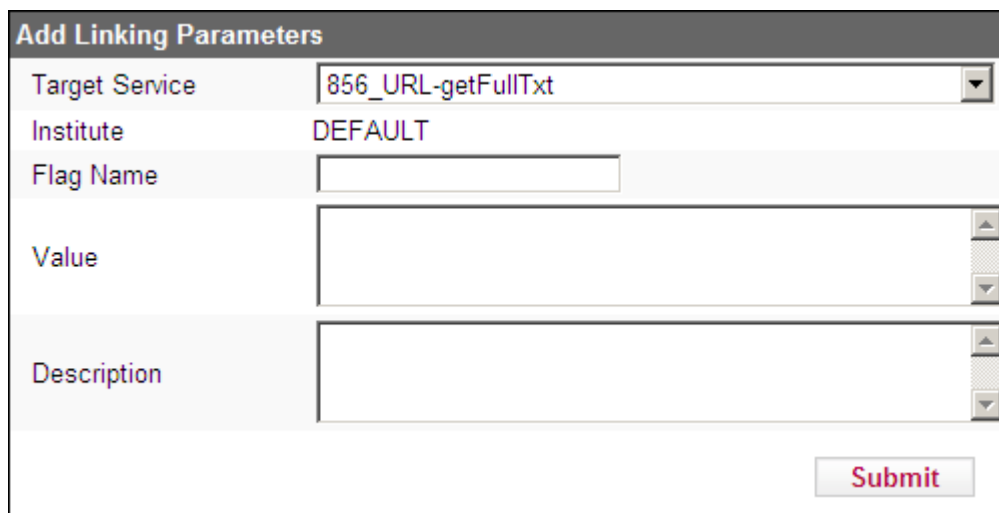


Figure 63: Add Linking Parameters

- 2 Fill in the fields according to the following table:

Table 9. Add Linking Parameters

Field	Description
<b>Target Service</b>	From the drop-down list, select a target service
<b>Institute</b>	The name of the institute with which the linking parameter is associated
<b>Flag Name</b>	The text of the parameter
<b>Value</b>	The value of the parameter
<b>Description</b>	A description of the parameter

- 3 To confirm your changes, click **Submit**.

## Institutes

You can add and edit institute information in SFX. To display the list of institutes defined in your instance, from the KBManager section of the Data Management area, click **Institutes**. The List of Institutes window opens:

**ExLibris SFX**  
Home | **KBManager** | KBTools | Statistics | Troubleshooting  
Sources | Targets | Objects | Linking Parameters | **Institutes**

**Institutes: List**

[Add Institute/Group](#)

Search for institute

Actions	Institute Name	Institute Display Name	IP ranges	Groups	Note
<a href="#">E</a> <a href="#">D</a>	InstA	Institution A		Group1	
<a href="#">E</a> <a href="#">D</a>	InstB	Institution B		Group2	
<a href="#">E</a> <a href="#">D</a>	InstC	Institution C		Group2	

Search for group

Actions	Group Name	Group Display Name
<a href="#">E</a> <a href="#">D</a>	Group1	Group 1
<a href="#">E</a> <a href="#">D</a>	Group2	Group 2

Figure 64: List of Institutes

For more information about institutes, refer to the **Institute Feature** section of the *SFX Advanced User's Guide*.

## Thresholds

This section includes:

- [Thresholds Overview](#) on page 116
- [Local and Global Thresholds](#) on page 117
- [Threshold Composer](#) on page 118
- [Threshold Types](#) on page 121
- [Backward Compatibility of OpenURL 0.1 Thresholds](#) on page 128
- [List of Threshold Attributes](#) on page 128

## Thresholds Overview

Thresholds are conditions placed on targets, services, or object portfolios. They determine whether or not a given source links to a given target, and whether or not a service is displayed in the SFX menu. Thresholds can be set in the following windows:

- **List of Targets** – Conditions for linking to a vendor
- **List of Target Services** – Conditions for linking to a type of service at a vendor—for example, full-text or abstracts at a publisher.
- **List of Object Portfolios** – Conditions for linking to an object. For example, a journal for the getFullTxt service of HighWire may be available only from 1997 volume 2 issue 3 and later.

Thresholds are written as boolean conditions in Perl. Thresholds are conditions that affect the SFX request. The data in the SFX request should match the thresholds. This SFX request begins with the following Perl statement:

```
$obj
```

The following is a list of threshold types:

```
$obj->need(attribute_name, [operator, [value]])  
$obj->parsedDate(operator, date_value, volume_value,  
issue_value)  
$obj->timediff(operator, timestring)  
$obj->plugIn(name_of_plugin_program)  
$obj->inList('@array', 'string');  
$obj->NotInList('@array', 'string')
```

---

### NOTE:

The maximum length of a threshold is 2048 characters.

---

In addition, another type of threshold exists, dealing with authentication issues. See **Authentication** on page 126 for more information.

The following is a list of threshold operators:

Table 10. Operators

Operator	Description
>	Greater than
<	Less than
>=	Greater or equal
<=	Less or equal
!=	Not equal

Table 10. Operators

Operator	Description
<code>==</code>	Equal
<code>gt</code>	Greater than (alpha-numeric)
<code>lt</code>	Less than (alpha-numeric)
<code>ge</code>	Greater or equal (alpha-numeric)
<code>le</code>	Less or equal (alpha-numeric)
<code>ne</code>	Not equal (alpha-numeric)
<code>eq</code>	Equal (alpha-numeric)

## Local and Global Thresholds

In each database table where thresholds can be used, two thresholds exist: global and local.

- **Global thresholds** – Thresholds supplied by Ex Libris. Global thresholds are used by default. If an institution does not fill in the local threshold field, the global threshold is used.

During the update procedure, global thresholds are automatically updated if necessary—for example, if a particular journal has more electronic backfiles than it had before. When the global threshold is active in an institution's SFX database and Ex Libris changes this threshold during an update, the updated threshold is automatically available to the institution.

- **Local threshold** – Thresholds created by an institution to reflect local conditions. If an institution creates a local threshold, this threshold overrides the global threshold field. The local threshold is used instead.

Local thresholds are typically used to specify an institution's subscription dates of electronic journals. For example, although an electronic journal is available from 1990 and later on a publisher's Web site, an institution has access only from 1999 and later because the subscription started only in 1999. In this case, the global threshold is 1990, and the local threshold is 1999. During the update procedure, local thresholds are never removed or changed.

You can combine local and global thresholds. For example, you can specify:

- Local threshold AND global threshold: `GLOBAL && LOCAL`
- Local threshold OR global threshold: `GLOBAL || LOCAL`

For example, if a librarian wants to test the addition of certain objects before releasing them to users, the librarian could define the following:

- The global threshold is:

```
$obj->parsedDate(">=",1994,26,2)
```

- The local threshold is:

```
GLOBAL && $ENV{'HTTP_X_FORWARDED_FOR'}=~/^207.31.245./
```

Together the threshold is:

```
$obj->parsedDate(">=",1994,26,2) &&  
$ENV{'HTTP_X_FORWARDED_FOR'}=~/^207.31.245./
```

In a different example, you can construct the following threshold for an object portfolio where the global threshold consists of `$obj->parsedDate(">=",1998,60,1)` and the local subscription begins in 1996:

```
GLOBAL || $obj->parsedDate(">=",1996,58,1)
```

In this way, you can tell the SFX server to take note of the local threshold, but should the global threshold change to an earlier date, the library can take advantage of it immediately upon the update.

## Threshold Composer

For those not familiar with Perl, a threshold composer is provided to assist in the creation of thresholds in the proper Perl syntax.

**To compose a threshold:**

- 1 Click **Compose** from the threshold field when editing or adding targets, target services, and object portfolios. The Compose Threshold dialog box opens:

Figure 65: Compose Threshold

- 2 Fill in the fields of the Compose Threshold dialog box according to the following table:

Table 11. Compose Thresholds

Field	Description
Use	Global and/or local threshold
Genre	Select one type of object that may link to this target.

Table 11. Compose Thresholds

Field	Description
<b>Needs</b>	Select one or more ContextObject (CTXO) attributes that need to be defined in the SFX request. (See more about the CTXO in the <b>Context Object</b> section of the <i>SFX Advanced User's Guide</i> .)
<b>First/Last/Exact Publication</b>	Fill in the date boundaries for publication dates.  <b>NOTE:</b> Only use this field for object portfolios - not for target or target services.
<b>Embargo/Moving Wall</b>	Indicates an embargo period.  <b>NOTE:</b> Only use this field for object portfolios - not for target or target services.
<b>Plugin</b>	Program for conditional display of an SFX target or target service
<b>IP Range</b>	Authentication threshold

3 To confirm your changes, click **Submit**.

Not every value has to be set to create a valid Perl threshold. For example, you can select only **Book** in **Genre** to create a threshold stating that only books can link to this target service. Similarly, you can just type 1998 in the **Year** field of **FIRST\_PUB** to link all objects with a publication year later than 1998 to this target service.

You can use the threshold composer more than once to create complex thresholds by combining previous thresholds with && (and) or || (or). In the following example, you create a new threshold that means that the target service needs an ISSN or an ISBN:

#### To create a complex threshold:

- 1 Select **rft.issn** in the Needs section.
- 2 Click **Submit** and select any of the three options in the Confirm Threshold window.
- 3 Go back to the threshold composer and select **rft.isbn** in the Needs section.
- 4 Click **Submit**. The Confirm Threshold dialog box opens:



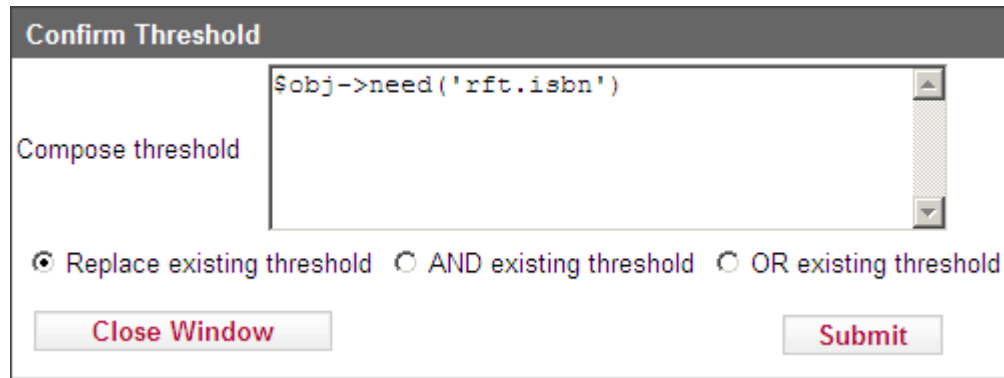


Figure 66: Confirm Threshold

- 5 Select **OR existing threshold**.
- 6 Click **Submit**.

The Perl threshold in the Edit window is now set to the following:

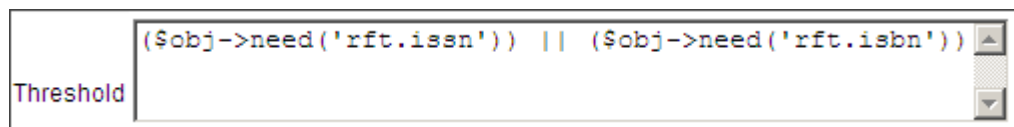


Figure 67: Threshold

- 7 In the Edit window, click **Submit** to store the new threshold in the SFX database.

---

**NOTE:**

The maximum length of a threshold is 2048 characters.

---

## Threshold Types

Date threshold information for the parsed date, current time, and moving wall thresholds stored in the `OBJECT_PORTFOLIO` table are displayed in the SFX menu and the A-Z list **Available from** section. For example:

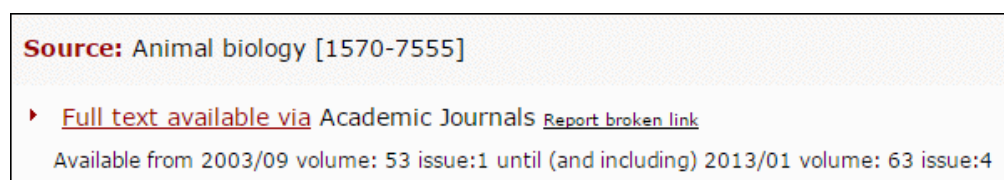


Figure 68: Date Threshold

It is recommended to use date and embargo/moving wall thresholds only for object portfolios and not for target services or targets, since the threshold information in the `TARGET` and `TARGET_SERVICE` tables is not displayed in the **Availability from** section of the SFX menu, is ignored during exports, and is disregarded when building the Rapid Service Indicator index.

This section explains and describes several threshold types:

- **Parsed Date** on page 122
- **Moving Wall/Embargo** on page 123
- **Need Attribute** on page 125
- **Authentication** on page 126
- **In List** on page 127
- **Plug In** on page 127

### **Parsed Date**

Use the Parsed Date threshold to construct a threshold telling the SFX scripts which date boundaries to match. This threshold is often used in object portfolios because you typically store license boundaries in this table.

```
$obj->parsedDate(  
  "<" | ">" | "<=" | ">=" | "gt" | "lt" | "ge" | "le" | "=="  
  | "eq"  
  , <date> | undef  
  , <volume> | undef  
  , <issue> | undef  
);
```

Where `<date>` can be in one of the following formats: `<YYYY>` | `<YYYYMM>` | `<YYYYMMDD>`

For example:

- You have access from 1998 volume 23 issue 1; the threshold is:

```
$obj->parsedDate(">=", 1998, 23, 1) .
```

- You have access from 1994 volume 2 issue 1 to 1998 volume 6 issue 11; the threshold is:

```
$obj->parsedDate(">=", 1994, 2, 1) && $obj->  
>parsedDate("<=", 1998, 6, 11) .
```

- You have access from 1997 issue 23 to 1999 issue 35; the threshold is:

```
$obj->parsedDate(">=", 1997, undef, 23) &&  
$obj->parsedDate("<=", 1998, undef, 35) .
```

- You have access from January 1st 1998 volume 23 issue 1; the threshold is:

```
$obj->parsedDate(">=", 19980101, 23, 1)
```

- You have access from March 1st 1997 until December 31 1999; the threshold is:

```
$obj->parsedDate(">=", 19970301, undef, undef) &&  
$obj->parsedDate("<=", 19981231, undef, undef) .
```

Use the value `undef` in `parsedDate` for volume or issue if this value is not relevant.

The following are the threshold rules for the `parsedDate` threshold:

- Both the month/day information AND the volume/issue information are taken into account as part of the threshold calculation, if they exist. If either month/day or volume/issue information match, this is treated as `threshold passes`.
- If either volume/issue or month/day information exist and are not `undef`, only volume/issue or month/day information is taken into account during the threshold calculation.

An exception to this rule is a case of partial data – for example, a day without a month. This is ignored.

- If month/day do not exist (or are `undef`), and volume/issue do not exist either (or are `undef`), the `parsedDate` threshold passes or fails based on year information.

### **Moving Wall/Embargo**

An embargo is a time period for which a journal is not available in a full text database. Embargoes allow publishers to make available their most recent journal articles only via journal subscription or pay per view, while older content is made available in aggregator full text databases.

A moving wall (also called a rolling year) is any period of 12 consecutive months for which coverage is available. What is available is always the most recent months.

The following are examples of vendors or hosting services that use moving walls or embargo periods:

- EBSCOHOST
- ELSEVIER\_WEB\_EDITIONS

To solve the problems of embargo periods or moving walls, SFX uses a special type of threshold called a moving wall threshold.

For example, some HighWire journals are free if the publication date is more than six months prior to the current date. You can write the threshold above as:

```
$obj->timediff('>', '6m')
```

The threshold is true if the `year` and `month` attributes of the Generic Request are more than six months (6m) from the current date. This, of course, works only if you have a `month` attribute in the request.

The following is the syntax of the threshold:

```
$obj->timediff(<operator>, <timestring>)  
<timestring> can be:  
'[0-9]?[Yy]?[0-9][Mm]'
```

For example:

- 9y – 9 years
- 9Y – 9 years (command is case-insensitive)
- 14m – 14 months
- 1y6m – 1 year and six months

The following threshold means that the article is published after 1995, volume 10, issue 2 but more than six months ago:

```
$obj->parsedDate('>', 1995, 10, 2) && $obj->timediff('>', '6m')
```

---

#### NOTE:

When no month or day details are sent in the OpenURL (which is the case for the majority of SFX sources) SFX cannot determine the availability status. In such situations, SFX displays the full text and only matches the year.

You can configure the SFX menu to display a warning if an article may not be available because of an embargo or moving wall period. For more information on configuring this warning, see **Menu Design – General Configuration** on page 423.

---

## Need Attribute

Use the Need Attribute threshold to indicate which attributes should be defined in the SFX request.

```
Syntax
$obj->need(
  <attribute>
  [,"<" | ">" | "<=" | ">=" | "gt" | "lt" | "ge" | "le" | "=="
  | "!=" | "eq" | "ne",<value>]
);
```

For example:

- The SFX request should contain the last name of the (first) author. This threshold is written as:

```
$obj->need('@rft.aulast')
```

- The SFX request should have a year later than or equal to 1998 and should have a volume defined. This threshold is written as:

```
$obj->need('rft.year', '>=', '1998')) && ($obj->need('rft.volume')
```

You can build complex thresholds in the following way:

```
$obj->need('@rft.aulast') &&
$obj->need('rft.year', '>=', '1998')) &&
($obj->need('rft.volume') &&
(
$obj->need('rft.jtitle') ||
$obj->need('@rft.abbrev')
```

The above threshold indicates the following: The SFX request needs at least the last name of the (first) author and a publication year later than or equal to 1998, the volume must be set, and there should be a journalTitle or abbreviated title.

The following is another example of a needAttribute threshold: The SFX request should contain specific information about the source database. The following two source attributes can be used in thresholds:

- **sfx.sourcename** – corresponds to the source ID field entry in the SFX database
- **sfx.sid** – corresponds to the sid value in the OpenURL

For example:

- The following threshold lists a specific service in the SFX menu only if you are using a CSA database as a source. The source ID field in the SFX database for CSA databases is `CSA`. This threshold is written as:

```
$obj->need('sfx.sourcename','eq','CSA')
```

- The following threshold prevents a particular service from being listed in the SFX menu if the user is using the Aleph database as a source.

The `sid` sent in the OpenURL is `ALEPH`. For example:

```
http://demo.exlibrisgroup.com:9003/  
demo?sid=ALEPH:EXU01&genre=book&isbn=039304839X&date=1999&title  
=The+return+of+depression+economics&aulast=Krugman&aufirst=Paul
```

This threshold is written as:

```
$obj->need('sfx.sid','ne','ALEPH:EXU01')
```

It is possible to use regular expressions in the Need Attribute threshold. However, you need to use the following operators:

- `!~` (for negative)
- `~=` (for positive)

It is not possible to use `eq` or `ne` in this case.

If the `sid` of the OpenURL could be either `ALEPH:EXU01` or `ALEPH:ADR01`, the threshold needs to include a regular expression to indicate that the `sid` value should not start with Aleph. For example:

```
$obj->need('sfx.sid','!~','/^ALEPH/')
```

If a link to Amazon.com should appear only if the ISBN starts with 0 (for English books), the threshold is:

```
$obj->need('rft.isbn','~=','/^0/')
```

## Authentication

The Authentication threshold lets you present services for particular groups of users only. The authentication can be based on an IP address, IP range, or domain. You can also protect your SFX site with WWWAuthenticate.

For example:

- To display only services for the local domain, you can add thresholds such as:

```
$ENV{'HTTP_X_FORWARDED_FOR'} =~ /^157.193./
```

- To display this test target only to the administrator, enter a threshold such as:

```
$ENV{'HTTP_X_FORWARDED_FOR'} eq '157.193.59.119'
```

- You can password-protect the SFX site with a WWWAuthenticate. You can make users or groups this way and state in the threshold:

```
$ENV{'REMOTE_USER'} eq 'administrator'
```

or

```
$ENV{'REMOTE_GROUP'} eq 'staff'
```

The first example shows the service only if the user is authenticated on the Apache server as an administrator. The second example shows the service only if the user is authenticated on the Apache server and belongs to the Apache group staff.

### **In List**

The In List threshold lets you present services if a specific string exists or does not exist in an array:

The following is the syntax of the In List threshold:

```
$obj->InList('@array', 'string');  
$obj->NotInList('@array', 'string')  
Examples:  
$obj->InList('@rft.subject', 'sculpture')  
$obj->NotInList('@sfx.category', 'Health Sciences')
```

### **Plug In**

The Plug In threshold is used to set up a specific target to appear in the SFX menu only after a plug-in program performs an additional check and receives a positive reply.

The following is the threshold of the syntax of the Plug In threshold:

```
$obj->plugIn('name_of_plugin_program')
```

For example:

```
$obj->plugIn('ALEPH')
```

More information about the Plug-In feature can be found in the **Plug-In Feature** section of the *SFX Advanced User's Guide*.

## Backward Compatibility of OpenURL 0.1 Thresholds

Thresholds created in the SFX KnowledgeBase before version 4 use OpenURL 0.1 attributes. For example:

```
($obj->need('ISBN') || $obj->need('ISSN') || $obj->need('eISSN') || $obj->need('bookTitle') || $obj->need('journalTitle') || $obj->need('@abbrevTitle'))
```

When defining new thresholds, it is recommended that you use the OpenURL 1.0 attributes. In the above example, this would be:

```
($obj->need('rft.isbn') || $obj->need('rft.issn') || $obj->need('rft.eissn') || $obj->need('rft.btitle') || $obj->need('rft.jtitle') || $obj->need('@rft.abbrev'))
```

or:

```
$obj->need('sfx.sourcename', 'ne', 'CSA')
```

## List of Threshold Attributes

The following table lists the threshold attributes.

Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
url_ver	^.*\$
url_tim	^.*\$
url_ctx_fmt	^.*\$
# Resolver attributes	
@res_id	^.*\$
# Referrer attributes	
@rfr_id	^.*\$
rfr_dat	^.*\$
rfr_val_fmt	^.*\$
rfr_ref_fmt	^.*\$
rfr_ref	^.*\$
# Context attributes	
ctx_ver	^.*\$
ctx_enc	^.*\$



Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
ctx_id	^.*\$
ctx_tim	^.*\$
# Service-type attributes	
@svc_id	^.*\$
svc_val_fmt	^.*\$
svc_ref_fmt	^.*\$
svc_ref	^.*\$
svc_dat	^.*\$
svc.fulltext	^yes no\$
svc.abstract	^yes no\$
svc.citation	^yes no\$
svc.holdings	^yes no\$
svc.ill	^yes no\$
svc.any	^yes no\$
# Requester attributes	
@req_id	^.*\$
req_val_fmt	^.*\$
req_ref_fmt	^.*\$
req_ref	^.*\$
req_dat	^.*\$
# Referrent attributes	
@rft_id	^.*\$
@rfe_id	^.*\$
rft_val_fmt	^.*\$
rfe_val_fmt	^.*\$
rft_ref_fmt	^.*\$
rfe_ref_fmt	^.*\$
rft_ref	^.*\$
rfe_ref	^.*\$

Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
rft.dat	^.*\$
rfe.dat	^.*\$
rft.genre	^(article book bookitem conference document dissertation issue journal patent preprint proceeding report)\$
rfe.genre	^(article book bookitem conference document dissertation issue journal patent preprint proceeding report)\$
# These	
rft.object_type	^(BOOK JOURNAL)\$
rfe.object_type	^(BOOK JOURNAL)\$
rft.isbn	^(\\d-?){9}[0-9xX]\$
rft.isbn_additional	^(\\d-?){9}[0-9xX]\$
rfe.isbn	^(\\d-?){9}[0-9xX]\$
rft.eisbn	^(\\d-?){9}[0-9xX]\$
rft.eisbn.additional	^(\\d-?){9}[0-9xX]\$
rft.issn	^\\d{4}-?\\d{3}[-0-9xX]\$
rfe.issn	^\\d{4}-?\\d{3}[-0-9xX]\$
rft.eissn	^\\d{4}-?\\d{3}[-0-9xX]\$
rfe.eissn	^\\d{4}-?\\d{3}[-0-9xX]\$
rft.coden	^[A-Z]{5}[A-Z0-9]\$
rfe.coden	^[A-Z]{5}[A-Z0-9]\$
rft.sici	^\\S+\$
rfe.sici	^\\S+\$
rft.bici	^\\S+\$
rfe.bici	^\\S+\$
rft.atitle	^.*\$
rfe.atitle	^.*\$
rft.btitle	^.*\$
rfe.btitle	^.*\$

Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
rft.jtitle	^.*\$
rfe.jtitle	^.*\$
@rft.stitle	^.*\$
@rfe.stitle	^.*\$
rft.title	^.*\$
rfe.title	^.*\$
rft.volume	^(\\D+[1-9]\\d*) (\\D+) ([1-9]\\d*)([\\-&+\\/](\\D+[1-9]\\d*) (\\D+) ([1-9]\\d*))?\$
rfe.volume	^(\\D+[1-9]\\d*) (\\D+) ([1-9]\\d*)([\\-&+\\/](\\D+[1-9]\\d*) (\\D+) ([1-9]\\d*))?\$
rft.volume_alphaend	^[a-zA-Z]{0,6}
rfe.volume_alphaend	^[a-zA-Z]{0,6}
rft.volume_alphaend	^[a-zA-Z]{0,6}
rfe.volume_alphaend	^[a-zA-Z]{0,6}
rft.volume_start	^[1-9][0-9]{0,5}\$
rfe.volume_start	^[1-9][0-9]{0,5}\$
rft.volume_end	^[1-9][0-9]{0,5}\$
rfe.volume_end	^[1-9][0-9]{0,5}\$
rft.issue	^(\\D+[1-9]\\d*) (\\D+) ([1-9]\\d*)([\\-&+\\/](\\D+[1-9]\\d*) (\\D+) ([1-9]\\d*))?\$
rfe.issue	^(\\D+[1-9]\\d*) (\\D+) ([1-9]\\d*)([\\-&+\\/](\\D+[1-9]\\d*) (\\D+) ([1-9]\\d*))?\$
rft.issue_alphaend	^[a-zA-Z]{0,6}
rfe.issue_alphaend	^[a-zA-Z]{0,6}
rft.issue_alphaend	^[a-zA-Z]{0,6}
rfe.issue_alphaend	^[a-zA-Z]{0,6}
rft.issue_start	^[1-9]-?\\d{0,5}\$
rfe.issue_start	^[1-9]-?\\d{0,5}\$
rft.issue_end	^[1-9]-?\\d{0,5}\$
rfe.issue_end	^[1-9]-?\\d{0,5}\$

Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
rft.spage	^[1-9][0-9]{0,4}\$
rfe.spage	^[1-9][0-9]{0,4}\$
rft.epage	^[1-9][0-9]{0,4}\$
rfe.epage	^[1-9][0-9]{0,4}\$
rft.pages	^.*\$
rfe.pages	^.*\$
rft.tpages	^.*\$
rfe.tpages	^.*\$
rft.date	^[ \d \- ]+\$# to accept backwards compatible 999
rfe.date	^[1-9][0-9]{3}[-0-9]{0,3}[-0-9]{0,3}\$
rft.year	^[1-9][0-9]{3}\$
rfe.year	^[1-9][0-9]{3}\$
rft.month	^[0-9]{1,2}\$
rfe.month	^[0-9]{1,2}\$
rft.day	^[0-9]{1,2}\$
rfe.day	^[0-9]{1,2}\$
rft.archive	^\S+\$
rfe.archive	^\S+\$
rft.archiveId	^\S+\$
rfe.archiveId	^\S+\$
rft.au	^.*\$
rfe.au	^.*\$
@rft.aulast	^.*\$
@rfe.aulast	^.*\$
@rft.aufirst	^.*\$
@rfe.aufirst	^.*\$
@rft.auinit	^.*\$
@rfe.auinit	^.*\$
@rft.auinit1	^.*\$

Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
@rfe.auunit1	^.*\$
@rft.auunitm	^.*\$
@rfe.auunitm	^.*\$
@rft.aucorp	^.*\$
@rfe.aucorp	^.*\$
@rft.ausuffix	^.*\$
@rfe.ausuffix	^.*\$
rft.place	^.*\$
rfe.place	^.*\$
rft.pub	^.*\$
rfe.pub	^.*\$
rft.edition	^.*\$
rfe.edition	^.*\$
rft.co	^.*\$
rfe.co	^.*\$
rft.cc	^[a-zA-Z]{2}\$
rfe.cc	^[a-zA-Z]{2}\$
rft.inst	^.*\$
rfe.inst	^.*\$
rft.advisor	^.*\$
rfe.advisor	^.*\$
rft.degree	^.*\$
rfe.degree	^.*\$
rft.chron	^.*\$
rfe.chron	^.*\$
rft.ssn	^(winter summer spring fall)\$
rfe.ssn	^(winter summer spring fall)\$
rft.quarter	^[1-4]{1}\$
rfe.quarter	^[1-4]{1}\$

Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
rft.part	^\w+\$
rfe.part	^\w+\$
rft.artnum	^\d+\$
rfe.artnum	^\d+\$
rft.inventor	^.*\$
rfe.inventor	^.*\$
rft.invlst	^.*\$
rfe.invlst	^.*\$
rft.invfirst	^.*\$
rfe.invfirst	^.*\$
rft.kind	^.*\$
rfe.kind	^.*\$
rft.applcc	^.*\$
rfe.applcc	^.*\$
rft.applnumber	^.*\$
rfe.applnumber	^.*\$
rft.number	^.*\$
rfe.number	^.*\$
rft.appldate	^[1-9][0-9]{3}[-0-9][0-9]{1,2}[-0-9][0-9]{1,2}\$
rfe.appldate	^[1-9][0-9]{3}[-0-9][0-9]{1,2}[-0-9][0-9]{1,2}\$
rft.applyear	^[1-9][0-9]{3}\$
rfe.applyear	^[1-9][0-9]{3}\$
rft.applmonth	^[0-9]{1,2}\$
rfe.applmonth	^[0-9]{1,2}\$
rft.applday	^[0-9]{1,2}\$
rfe.applday	^[0-9]{1,2}\$
rft.assignee	^.*\$
rfe.assignee	^.*\$
rft.pubdate	^[1-9][0-9]{3}[-0-9][0-9]{1,2}[-0-9][0-9]{1,2}\$

Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
rfe.pubdate	^[1-9][0-9]{3}[-0-9][0-9]{1,2}[-0-9][0-9]{1,2}\$
rft.pubyear	^[1-9][0-9]{3}\$
rfe.pubyear	^[1-9][0-9]{3}\$
rft.pubmonth	^[0-9]{1,2}\$
rfe.pubmonth	^[0-9]{1,2}\$
rft.pubday	^[0-9]{1,2}\$
rfe.pubday	^[0-9]{1,2}\$
rft.prioritydate	^[1-9][0-9]{3}[-0-9][0-9]{1,2}[-0-9][0-9]{1,2}\$
rfe.prioritydate	^[1-9][0-9]{3}[-0-9][0-9]{1,2}[-0-9][0-9]{1,2}\$
rft.priorityyear	^[1-9][0-9]{3}\$
rfe.priorityyear	^[1-9][0-9]{3}\$
rft.prioritymonth	^[0-9]{1,2}\$
rfe.prioritymonth	^[0-9]{1,2}\$
rft.priorityday	^[0-9]{1,2}\$
rfe.priorityday	^[0-9]{1,2}\$
rft.series	^.*\$
rfe.series	^.*\$
rft.creator	^.*\$
rft.description	^.*\$
rft.publisher	^.*\$
rft.contributor	^.*\$
rft.type	^.*\$
rft.format	^.*\$
rft.identifier	^.*\$
rft.relation	^.*\$
rft.coverage	^.*\$
rft.rights	^.*\$
#local attributes	
rft.medUID	\\d{8,10}

Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
rfe.medUID	\d{8,10}
@rft.tickUID	\w{3,10}
@rfe.tickUID	\w{3,10}
rft.LCCN	^[0-9]{8,10}\$
rfe.LCCN	^[0-9]{8,10}\$
rft.ED_NUMBER	^[A-Z0-9]+\$
rfe.ED_NUMBER	^[A-Z0-9]+\$
rft.EJ_NUMBER	^[A-Z0-9]+\$
rfe.EJ_NUMBER	^[A-Z0-9]+\$
@rft.relatedISSN	^\d{4}-?\d{3}[-0-9xX]\$
@rfe.relatedISSN	^\d{4}-?\d{3}[-0-9xX]\$
@rft.subject	^.*\$
@rfe.subject	^.*\$
@rft.Attribute	^.*\$
@rfe.Attribute	^.*\$
rft.user	^.*\$
rfe.user	^.*\$
@rft.Institute	^.*\$
@rfe.Institute	^.*\$
rft.Faculty	^.*\$
rfe.Faculty	^.*\$
rft.UserGroup	^.*\$
rfe.UserGroup	^.*\$
rft.Language	^.*\$
rfe.Language	^.*\$
rft.OpenURL	^.*\$
rfe.OpenURL	^.*\$
rft.SOURCE	^.*\$
rfe.SOURCE	^.*\$



Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
rft.dcTitle	^.*\$
rfe.dcTitle	^.*\$
rft.dcCreator	^.*\$
rfe.dcCreator	^.*\$
rft.dcSubject	^.*\$
rfe.dcSubject	^.*\$
rft.dcDescription	^.*\$
rfe.dcDescription	^.*\$
rft.dcPublisher	^.*\$
rfe.dcPublisher	^.*\$
rft.dcContributor	^.*\$
rfe.dcContributor	^.*\$
rft.dcType	^.*\$
rfe.dcType	^.*\$
rft.dcFormat	^.*\$
rfe.dcFormat	^.*\$
rft.dcIdentifier	^.*\$
rfe.dcIdentifier	^.*\$
rft.dcSource	^.*\$
rfe.dcSource	^.*\$
rft.dcLanguage	^.*\$
rfe.dcLanguage	^.*\$
rft.dcRelation	^.*\$
rfe.dcRelation	^.*\$
rft.dcCoverage	^.*\$
rfe.dcCoverage	^.*\$
rft.dcRights	^.*\$
rfe.dcRights	^.*\$
rft.dcYear	^[0-9][0-9]{2,3}\$

Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
rfe.dcYear	^[0-9][0-9]{2,3}\$
rft.dcMonth	^[0-9]{1,2}\$
rfe.dcMonth	^[0-9]{1,2}\$
rft.dcDay	^[0-9]{1,2}\$
rfe.dcDay	^[0-9]{1,2}\$
# SFX specific attributes	
# With entity	
rft.object_id	^\d+\$
rft.local_attribute	^.*\$
@rft.abbrev	^.*\$
@svc.constraints	^.*\$
req.ip	^.*\$
req.user_group	^.*\$
req.faculty	^.*\$
req.language	^.*\$
@req.institutes	^.*\$
rft.oai	^.*\$
rft.oai_repository_id	^.*\$
rft.oai_record_id	^.*\$
rfe.oai	^.*\$
rfe.oai_repository_id	^.*\$
rfe.oai_record_id	^.*\$
rft.doi	^.*\$
# With sfx entity	
@sfx.related_objects	^.*\$
@sfx.related_object_ids	^.*\$
@sfx.category	^.*\$
@sfx.subcategory	^.*\$
sfx.response_type	^(html simplexml directlink sfx_api_0_1_xml)\$

Table 12. Threshold Attributes

Attribute	Has to Match Regular Expression
sfx.ignore_date_threshold	^(1 0)\$
sfx.show_availability	^(1 0)\$
sfx.title_search	^(contains begins exact)\$
sfx.request_id	^\d+\$
sfx.augment_if_multi	^(0 1)\$
sfx.has_full_text	^(yes no)\$
sfx.tmp_svc	.*
sfx.doi_url	.*
sfx.openurl	.*
sfx.char_set	^.+\$\$

## Using KBManager: Examples and Scenarios

This section includes the following:

- [Using KBManager Overview](#) on page 139
- [Activating Global Targets, Target Services, and Object Portfolios Using KBManager or DataLoader](#) on page 140
- [Adding Local Information](#) on page 141
- [Creating Local Targets, Target Services, and Object Portfolios](#) on page 145

### Using KBManager Overview

When a new SFX instance is installed, the SFX database associated with this instance needs to be customized or localized. All electronic resources that are part of the digital collection of an institution's library need to be described or represented in the SFX database before SFX linking is possible.

To facilitate this localization, the SFX database of each instance contains a large KnowledgeBase—that is, a comprehensive collection of sources, services, targets, objects, and object portfolios defined by Ex Libris. This information can be used by an institution to define its digital collection.

---

#### **IMPORTANT:**

All information that is part of the original KnowledgeBase is called **global**. It is globally relevant and is updated by Ex Libris.

---

An institution can edit existing entries and create or add local information, such as local sources, targets, and object portfolios that are specific to the particular institution.

Localization is performed in three steps:

- Activating global targets, target services, and object portfolios that are part of the KnowledgeBase.

Initially, all targets, target services, and object portfolios in the new instance are inactive. Before SFX linking is possible, the targets, target services, and object portfolios to which the institution subscribes need to be activated.

Activation can be performed using the KBManager and DataLoader. For details see, [Activating Global Targets, Target Services, and Object Portfolios Using KBManager or DataLoader](#) on page 140.

- Adding local information to these global targets, target services, and object portfolios. To optimize SFX linking, the institution may need to add:
  - Authentication information
  - Local server information
  - Proxy information
  - Local threshold information – necessary when local thresholds differ from global thresholds because of subscription agreements. Adding local information can be performed using KBManager and DataLoader. For details see, [Activating Global Targets, Target Services, and Object Portfolios Using KBManager or DataLoader](#) on page 140.
- Creating new local targets, target services, and object portfolios (optional). Creating new targets, target services, and object portfolios can be performed using the KBManager and the DataLoader. For details see, [Activating Global Targets, Target Services, and Object Portfolios Using KBManager or DataLoader](#) on page 140.

## Activating Global Targets, Target Services, and Object Portfolios Using KBManager or DataLoader

To activate object portfolios in KBManager, you can either activate object portfolios one by one, or click the **Activate All** button to activate all object portfolios for a particular target service (for institutions subscribing to the whole collection of journals of a particular publisher or host).

### To activate object portfolios using DataLoader:

- 1 Create a tab-delimited file with ISSNs of all the journals that need to be loaded for a particular publisher or host. For each target service, a separate file needs to be created. The format of the file is: `ISSN<tab>ACTIVE`.
- 2 Run DataLoader to activate the object portfolios. The first field name is **ISSN**. The second field name is **Activation Status**. Select the correct target service, then select **Update** (do not select **Create New**). For more information, see **DataLoader** on page 159.
- 3 After the loading process, check the `<datafile>.ok.err` file to see whether local portfolios need to be created. If this is the case, additional information needs to be added to these local portfolios to ensure that proper SFX linking is possible.
- 4 After loading each file, test the new information using the OpenURL generator and the **Test SFX** buttons in the List of Portfolios (For more information, see the **Using The OpenURL Generator To Test Your SFX Database** section of the *SFX Advanced User's Guide*).

## Adding Local Information

The following section describes how to add local information to your SFX instance. The following types of local information are described:

- **Adding Authentication Information** on page 141
- **Adding Local Thresholds** on page 143
- **General Rules When Comparing Local and Global Thresholds** on page 143
- **Using DataLoader to Update Different Fields Simultaneously** on page 144

### Adding Authentication Information

The **Authentication Note** field in the `TARGET`, `TARGET_SERVICE`, and `OBJECT_PORTFOLIO` tables can be used to specify the user name and password information that appears in the SFX menu. You use the **Authentication** field to present to users logon information that is not configured in the link-to syntax of a parser. HTML tags can be used to make text italic or bold. Adding local information can be performed using KBManager and DataLoader. For details, see **Activating Global Targets, Target Services, and Object Portfolios Using KBManager or DataLoader** on page 140.

The following is an example of logon information in the **Authentication** field of a target service in KBManager:

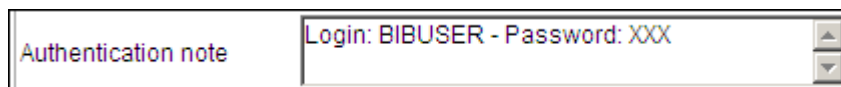


Figure 69: Logon Information in the Authentication Field

The result in the SFX menu is:

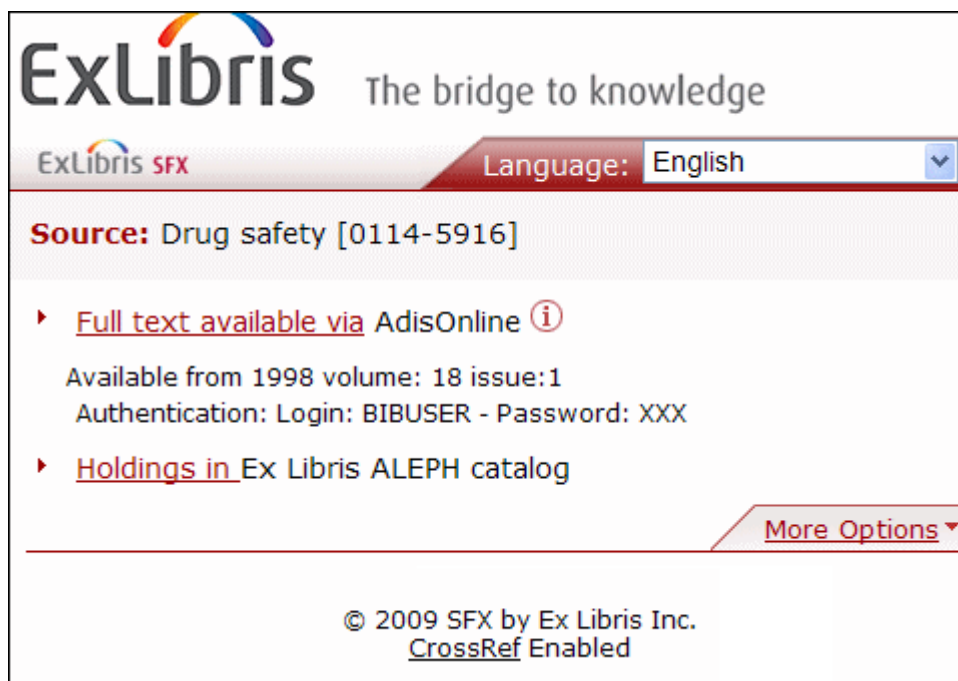


Figure 70: SXF Result Menu

DataLoader can be used to load authentication information to a large number of object portfolios.

#### To load authentication information via DataLoader:

1 Ensure that the format of the data file is:

```
ISSN<tab>login:<B>bibuser</B> - password:<B>xxxxxx</B>
```

2 Run DataLoader to add the authentication information:

- The first field name is **ISSN**.
- The second field name is **AUTHENTICATION\_NOTE**.

3 Select the correct target service

4 Select **Update PORTFOLIO information** (do not select **Add Portfolios**).

### **Adding Local Thresholds**

Local thresholds need to be loaded only if the global threshold information provided by Ex Libris differs from your local threshold information (for example, because of subscription agreements).

In general, it is recommended to use the global thresholds Ex Libris provides because:

- They enable easier and faster loading.
- They are updated automatically when Ex Libris finds that the threshold has changed.

When an institution finds that a global threshold needs to be changed, it is recommended to use the **Send to Ex Libris** link in KBManager, available in each Edit dialog box. Ex Libris checks the information and updates the central global database. All customers who subscribe to the KnowledgeBase service get the new global threshold as part of the next database update.

### **General Rules When Comparing Local and Global Thresholds**

- Check randomly (but extensively) and load all local thresholds if the majority of them differ from the global thresholds in the SFX database.
- Afterwards, you can remove local thresholds if you see that they are the same as the global thresholds.
- Do not load local thresholds if more than 95% are identical to the global thresholds in the database.

---

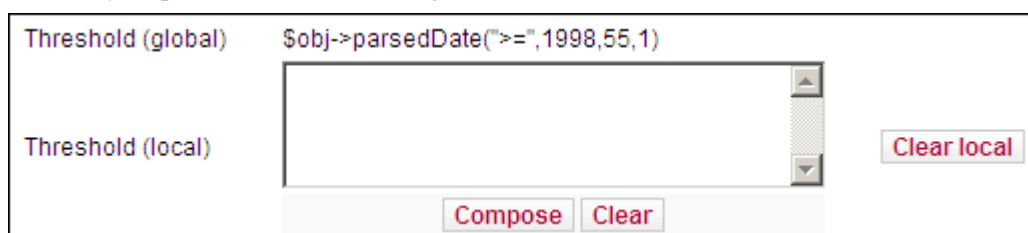
#### **NOTES:**

- For most full-text targets, the global thresholds can be used. This means the publisher provides access to all electronic issues, even if a library starts subscribing from a later time onward.
- Some full-text publishers provide access only to the electronic copies for which a library pays as part of the subscription package. In this case, local thresholds need to be provided.

---

Adding local threshold information can be performed using KBManager and DataLoader.

The following is an example of threshold information in the local threshold field of an object portfolio in KBManager:



Threshold (global) \$obj->parsedDate(">=",1998,55,1)

Threshold (local)

Clear local

Compose Clear

Figure 71: Local Threshold Field

DataLoader can be used to load local threshold information to a large number of object portfolios.

#### To load local threshold information via DataLoader:

- 1 Select the correct target service.
  - 2 Ensure that the format of the data file is:

```
ISSN<tab> $obj->parsedDate(">=",1997,101,1)
```
  - 3 Run DataLoader to add the threshold information:
    - The first field name is **ISSN**.
    - The second field name is **THRESHOLD**.
  - 4 For the load type, select **Update Portfolios** (do not select **Add Portfolios**).
- For more information on thresholds, see [Thresholds](#) on page 115.

#### Using DataLoader to Update Different Fields Simultaneously

DataLoader can be used to load the following information simultaneously:

- Object portfolio activations
- Authentication information
- Local thresholds

(For more information, see [DataLoader](#) on page 159).

#### To update different portfolios simultaneously using DataLoader:

- 1 Ensure that the format of the data file is:

```
ISSN<tab>ACTIVE<tab> login:<B>bibuser</B> -  
password:<B>xxxxxx</B> <tab>$obj->  
parsedDate(">=",1997,101,1)</B>
```



- 2 Run DataLoader to add the threshold information:
  - The first field name is **ISSN**.
  - The second field name is **ACTIVATION\_ STATUS**.
  - The third field name is **AUTHENTICATION\_NOTE**.
  - The fourth field name is **THRESHOLD**.
- 3 Select the correct target service.
- 4 Select **Update Portfolios** (do not select **Add Portfolios**).

## Creating Local Targets, Target Services, and Object Portfolios

When creating local targets, target services, and object portfolios, bear in mind that Ex Libris does not provide linking information for these elements. Before SFX linking to these targets, target services, and object portfolios can work, an institution must:

- Learn how to link to these new local resources
- Create linking to these new local resources

In general, creating local targets, target services, and object portfolios requires a thorough understanding of the SFX software.

### **Loading a New Portfolio to an Existing Target Service**

When adding a new object portfolio to the SFX database, the following steps are necessary:

- 1 Find information on how to link to the journal (URL). This information may be found in:
  - The MARC 856 field for this journal entry in your catalogue
  - A list of electronic journals in the library
  - The location bar of your Internet browser
- 2 Decide how to enable linking to the new object portfolio.

Four methods can be used:

  - Use the generic target parser (see below and **Using the Generic Target Parser for One Object Portfolio** on page 146 for more information).
  - Use the existing parser and filling in the correct parse param information.
  - Create a new target parser.
- 3 Add a new object portfolio to the SFX database using KBManager or DataLoader.

- Using KBManager:

In the list of portfolios, click the **Add Portfolio** button. Fill in the **Target Service** and **Object** fields. To fill in the **Object** field, you can use the **Select an Object** button to search the OBJECT table.

It is recommended to fill in a threshold and, if necessary, to fill in the **Parse Param** field (See [Using the Generic Target Parser for One Object Portfolio](#) on page 146.)

- Using DataLoader:

More information on adding portfolios with DataLoader can be found in **Section 1: Portfolios** in [DataLoader](#) on page 159.

---

**NOTE:**

The portfolios you create using the above instructions are local—that is, Ex Libris has not provided thresholds and parse param information. You must provide this information yourself.

---

### **Using the Generic Target Parser for One Object Portfolio**

- Using KBManager:

In KBManager, the **Parser** and **Parse Param** fields of the object portfolio must be filled in.

- The **Parser** field must contain the value **Generic**.
- The **Parse Param** field must contain a valid generic target parser syntax statement (see [Target Parsers](#) on page 110 for more information). For example:



The image shows a screenshot of a web form. On the left, there are two labels: 'Parser' and 'Parse Param'. To the right of 'Parser' is a text input field containing the word 'Generic'. To the right of 'Parse Param' is a larger text area containing the text: 'If (ISSN) "http://www.publisher.com/journal-title/"'. There are small up and down arrow icons on the right side of the text area.

Figure 72: Parser and Parse Param

- Using DataLoader:

You can load the parser and parse param information using DataLoader. This is useful when updating or loading a large number of object portfolios. In this case, your data file contains information about the local portfolios only:

```
<issn><tab>Generic<tab><parse_param>
```

Where the field names are **ISSN**, **Target Parser**, and **Parse Param**.

For example:

```
1245-987XGenericIF(ISSN) "http://www.journal.org/"
```

## Character Set Values Used in the Target char\_set Field

The following table lists the character set values used in the target char\_set field:

7bit-jis	cp875	MacArabic
AdobeStandardEn-coding	cp932	MacCentralEurRoman
AdobeSymbol	cp936	MacChineseSimp
AdobeZdingbat	cp949	MacChineseTrad
ascii	cp950	MacCroatian
ascii-ctrl	dingbats	MacCyrillic
big5-eten	eu-jp	MacDingbats
big5-hkscs	eu-kr	MacFarsi
cp1006	gb12345	MacGreek
cp1026	gb2312	MacHebrew
cp1047	gsm0338	MacIcelandic
cp1250	hp-roman8	MacJapanese
cp1251	hz	MacKorean
cp1252	iso-2022-jp	MacRoman
cp1253	iso-2022-jp-1	MacRomanian
cp1254	iso-2022-kr	MacRumanian
cp1255	iso-8859-1	MacSami
cp1256	iso-8859-10	MacSymbol
cp1257	iso-8859-11	MacThai
cp1258	iso-8859-13	MacTurkish
cp37	iso-8859-14	MacUkrainian

cp424	iso-8859-15	MIME-B
cp437	iso-8859-16	MIME-Header
cp500	iso-8859-2	MIME-Q
cp737	iso-8859-3	nextstep
cp775	iso-8859-4	null
cp850	iso-8859-5	posix-bc
cp852	iso-8859-6	shiftjis
cp855	iso-8859-7	symbol
cp856	iso-8859-8	UCS-2BE
cp857	iso-8859-9	UCS-2LE
cp860	iso-ir-165	UTF-16
cp861	jis0201-raw	UTF-16BE
cp862	jis0208-raw	UTF-16LE
cp863	jis0212-raw	UTF-32
cp864	johab	UTF-32BE
cp865	koi8-f	UTF-32LE
cp866	koi8-r	utf8
cp869	koi8-u	viscii
cp874	ksc5601-raw	

## SFX Admin Lite

You can use a simplified version of the SFX Admin Center to perform basic administration tasks such as searching for objects, activating and deactivating object portfolios, and running statistic reports. A recorded lesson about working with the new SFX Admin Lite profile is available to all SFX customers on the Ex Libris Learning Center at <http://learn.exlibrisgroup.com/course/view.php?id=213> (enrolment key: adm1n11te).

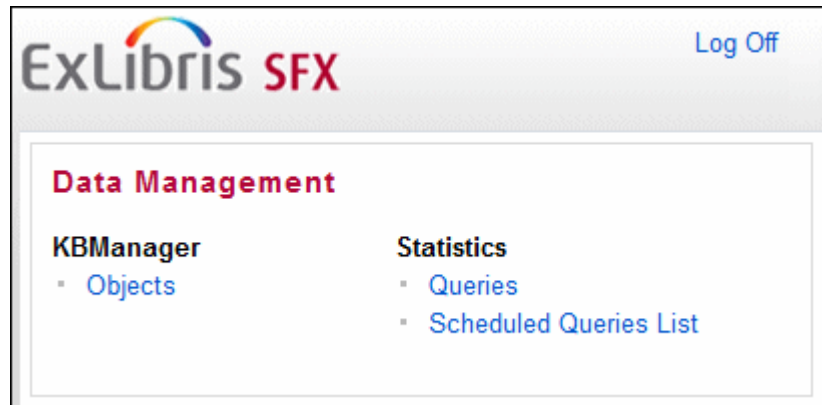


Figure 73: SFX Admin Lite

The interface has the following features:

- **KB Manager – Objects:** Find object and object portfolio information in the SFX database
- **Statistics**
  - **Queries** – Schedule a query to produce a statistic report
  - **Scheduled Queries List** – View a list of scheduled queries

## Searching for Objects

You can search for objects in the SFX database with the SFX Admin Lite.

### To search for objects with the SFX Admin Lite:

- 1 From the KBManager section of the SFX Admin Lite, click **Objects**. The Search Objects window opens:

The screenshot shows the 'Search objects' window in the ExLibris SFX Admin Lite. The window has a header with the ExLibris SFX logo and a 'Log Off' link. Below the header is a navigation bar with 'Home | KBManager | Statistics'. The main content area is titled 'Search objects' and contains a search form. The form has three rows of search criteria: 'Title', 'ISSN', and 'ISBN'. Each row has a drop-down menu for the identifier, a drop-down menu for the search operator (currently 'begins' is selected), and a text input field. There are 'Remove' buttons for each row and an 'Add Condition' button. At the bottom of the form are 'Clear Search' and 'Search' buttons.

By default, three drop-down lists are displayed.

- 2 From the drop-down lists, select one of the following identifiers:
  - **Title** – Selecting this identifier displays a drop-down list with the following options:
    - starts with
    - contains
    - exact

---

#### NOTE:

Exact searches for CJK titles behave like a Starts With search for titles longer than 42 characters. This is because title search keys for CJK characters are limited to 255 characters (where each CJK character after normalization requires 6 characters).

---

The search is performed for all title types (main, abbreviated, and so forth)

- ISSN – The search is performed for all types (electronic, incorrect, and print) and can be with or without dashes
- ISBN – The search is performed for all types (electronic, incorrect, and print) and can be with or without dashes.

- CODEN – The search is performed for a complete six-character string or using right truncation.
- DOI – The search is performed for an exact match, no truncation.
- LCCN – The search is performed for an exact match, no truncation.
- OCLC – The search is performed for an exact match, no truncation.
- Publisher – The search is performed for a complete publisher name or using right truncation.
- Place of Publication – The search is performed for an exact match, no truncation.
- OBJECT\_ID – The search is performed for an exact match, no truncation.
- Object Type – From the drop-down list, select an object type.
- Object Language – From the drop-down list, select a language.
- LOCAL– The search is performed for a complete LOCAL value or using right truncation
- Category – From the drop-down list, select a category.
- Author Personal – The search is performed for an exact match, no truncation.
- Author Corporate – The search is performed for an exact match, no truncation.
- Author Meeting – The search is performed for an exact match, no truncation.

---

**NOTE:**

Truncation is performed by entering the beginning of the search term, followed by an asterisk (\*).

---

- 3 Depending on the identifier you choose, another drop-down list or text box opens. From the drop-down list, select an item and enter text in the text box.
- 4 To add additional conditions to the search, click **Add Condition**.
- 5 Click **Search**.

The List of Search Results window opens with the search results:

The screenshot shows the ExLibris SFX KBManager interface. At the top, there is a navigation bar with 'Home', 'KBManager', and 'Statistics'. Below this is a red 'Objects' header. The main content area is titled 'Search objects' and includes a 'Show Search Box' button. Below the search box, there are controls for 'Show 20 Results of 18 objects', 'Page 1 of 1 Pages', and a 'Jump to page' field with a 'Go' button. The search results are displayed in a table with the following columns: #, ID ^, TITLE, Author, Type, and a set of icons (P, G, C). The table contains 18 rows of results, all related to 'BusinessWeek'.

#	ID ^	TITLE	Author	Type	Icons
1	v 0007-7135	BusinessWeek		JOURNAL	P G C
2	v 0891-6578	BusinessWeek careers		JOURNAL	P G C
3	v 0896-4912	The BusinessWeek newsletter for information executives		JOURNAL	P G C
4	v 1040-8193	The BusinessWeek newsletter for family-owned business		JOURNAL	P G C
5	v 1306-2387	BusinessWeek Türkiye		JOURNAL	P G C
6	v 1556-1232	BusinessWeek smallbiz		JOURNAL	P G C
7	v 8756-9116	BusinessWeek's guide to careers		JOURNAL	P G C
8	v 0-07-137824-3	BusinessWeek Guide to the Best Business Schools		BOOK	P G C
9	v 0-07-138241-0	BusinessWeek Guide to the Best Business Schools		BOOK	P G C
10	v 0-07-142501-2	BusinessWeek Guide to the Best Business Schools	Merritt, Jennifer	BOOK	P G C
11	v 0-07-159042-0	The Best Undergraduate B-Schools : Businessweek Fast Trac...		BOOK	P G C
12	v 0-07-160113-9	The Best B-schools		BOOK	P G C
13	v 0-07-160114-7	The Best Places to Launch a Career		BOOK	P G C
14	v 3310000000005607	BusinessWeek Magazine		NEWSPAPER	P G C
15	v 1000000000548613	BusinessWeek - The Welch Way		JOURNAL	P G C
16	v 1000000000548612	BusinessWeek - Technology and You		JOURNAL	P G C
17	v 1000000000717816	BusinessWeek.com		JOURNAL	P G C
18	v 1000000000419918	BusinessWeek - Print and Online		JOURNAL	P G C

Figure 74: List of Search Results

Each row of this table is structured in the following way:

- **V** **View** button – Click to view object details.
- **ID** – The value displayed is determined by the following order of priority:
  - ISSN
  - ISBN
  - LCCN
  - OCLC
  - CODEN
  - DOI
  - LOCAL
  - OBJECT\_ID



- **Title** – The title of the object.
- **Author** – The author of the object (if available).
- **Type** – The type of the object.
- **OP** – A green dot ● is displayed if the object contains active object portfolios.
- **P** – Click to display the List of Portfolios.
- **S** – Click to display the SFX menu.

To sort the results, click **ID** or **Title**. By default, the results are sorted by ID.

When sorting by ID, if the list consists of IDs from different identifiers, the list first sorts by like identifier (ISSN, ISBN, and so forth) and then by ID within the identifier.

## Viewing Objects

You can view an object from the List of Search Results.

### To view an object:

- 1 Click the **View** button **V** next to the object you want to view or click the object's title. The View Object window opens:




Figure 75: View Object Details

For an explanation of the fields in the View Object Details dialog box, see [Table 7 Object Fields](#) on page 90.

## Viewing Object Portfolios

You can view object portfolios in the List of Search Results.

To view the object portfolios for the object, click the **Portfolio** button . The List of Portfolios window opens:

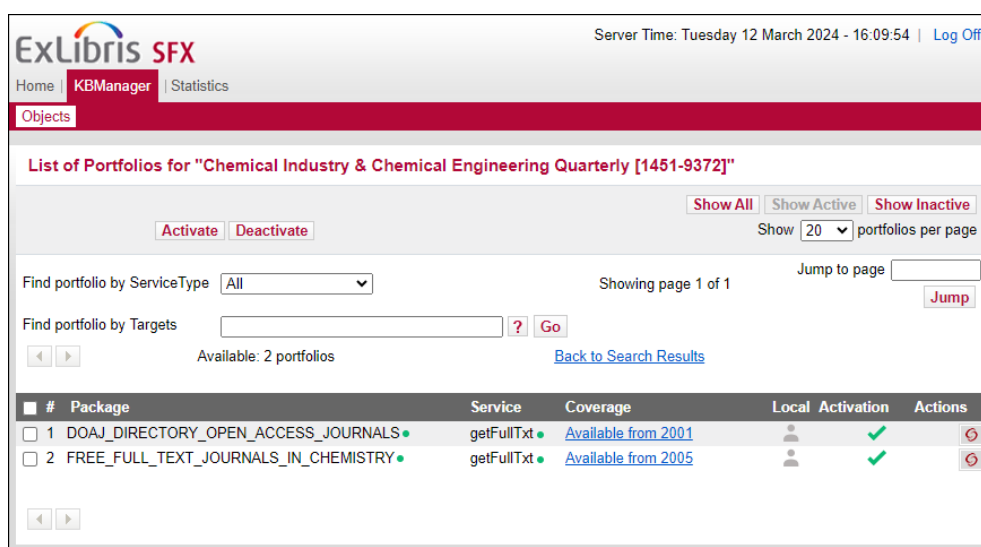






Figure 76: List of Portfolios

The Navigation bar contains the following sections:

- **Find portfolio by** – Search for a portfolio based on one of the following:
  - Title
  - ISSN
  - ISBN
  - Object ID
- **Jump to page** – Jump to a specific page.
- **Available** – The number of portfolios in the table.
- **Back to Search Results** – Move back to the list of search results.

The lower part of the work area displays the available object portfolios. Each row of this table is structured in the following way:

-  Check box – Select a check box next to a portfolio to mark the portfolio for activation.
- **Package** – The name of the package in which the portfolio is located.
- **Service** – The name of the target service.

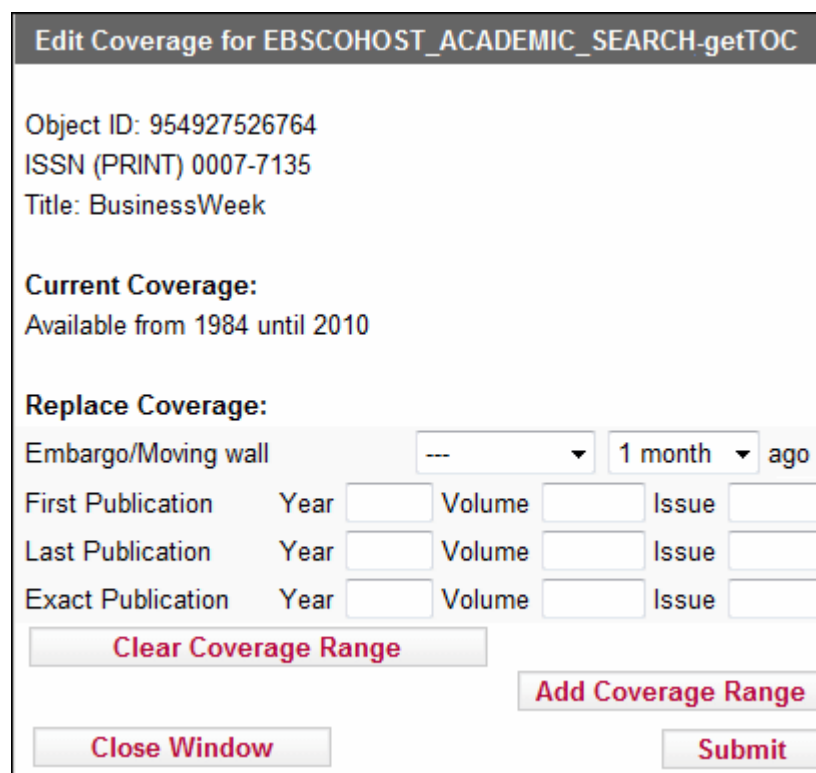
- **Coverage** – The time period for which you have coverage for the portfolio.
-   Active/Inactive indicator – Click to toggle the activation status indicator for the portfolio.
-  **Test SFX** button – Click to generate a new SFX menu that contains a link to this portfolio in order to test linking to it.

## Editing Coverage Information

You can edit coverage information from the List of Portfolios window.

### To edit coverage information:

- 1 Click the coverage link of the portfolio whose coverage information you want to edit. The Edit Coverage window opens:



**Edit Coverage for EBSCOHOST\_ACADEMIC\_SEARCH-getTOC**

Object ID: 954927526764  
ISSN (PRINT) 0007-7135  
Title: BusinessWeek

**Current Coverage:**  
Available from 1984 until 2010

**Replace Coverage:**

Embargo/Moving wall   ago

First Publication Year  Volume  Issue

Last Publication Year  Volume  Issue

Exact Publication Year  Volume  Issue

**Clear Coverage Range**

**Add Coverage Range**

**Close Window** **Submit**

Figure 77: Edit Coverage

2 Edit the fields according to the following table:

Table 13. Edit Object Portfolio

Field	Description
Object ID	The object ID
ISSN	The ISSN of the object
Title	The title of the object
Current Coverage	The current coverage information
Embargo/Moving Wall	Indicates an embargo period. An embargo is a time period for which a journal is not available in a full text database. A moving wall (also called a rolling year) is any period of 12 consecutive months for which coverage is available.
First/Last/Exact Publication	Fill in the date boundaries for the publication dates.

- 3 To clear coverage information from the fields, click **Clear Coverage Range**.
- 4 To add additional coverage range, click **Add Coverage Range**.
- 5 Click **Submit**.



---

**NOTE:**

To restore coverage information to the default settings, clear the coverage information and click **Submit**.

---

## Activating Object Portfolios

To activate an object portfolio, click the gray arrow . The arrow becomes green . Alternatively, select the check boxes next to the object portfolios you want to activate and click **Activate**.

If there are linking parameters for a target service, but the value is missing, the object portfolio cannot be activated and the following message is displayed:

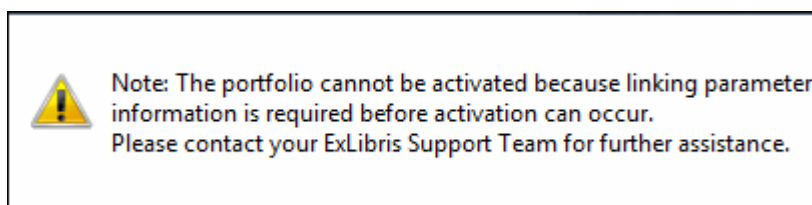




Figure 78: Missing Information Message

## Deactivating Object Portfolios

To deactivate an object portfolio, click the green arrow . The arrow becomes gray . Alternatively, select the check boxes next to the object portfolios you want to deactivate and click **Deactivate**.

## Testing the SFX Menu

To test how the object looks in the SFX menu, click the **SFX** button  next to an object. For example:

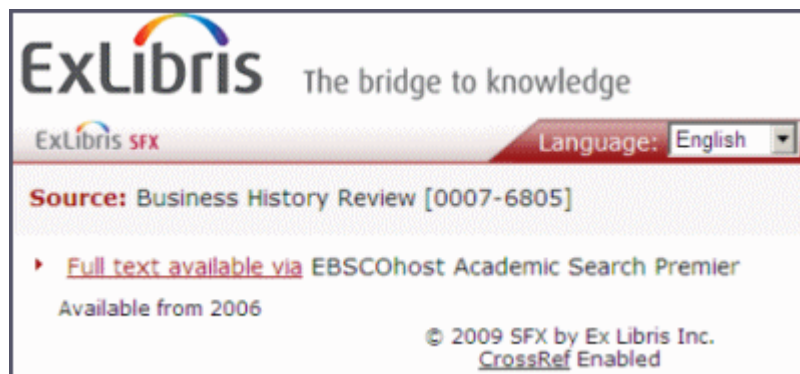


Figure 79: Test SFX Menu



# 4

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## KB Tools

This section includes:

- **KB Tools Overview** on page 159
- **DataLoader** on page 159
- **Export Tool** on page 193
- **Collection Tool** on page 240

## KB Tools Overview

The KB Tools section of the SFX Admin Center provides several tools that aid in the configuration of the SFX database.

---

**NOTE:**

For information on the command line versions of these tools, refer to the *SFX Advanced User's Guide*.

---

## DataLoader

DataLoader is a tool to manage and update object portfolios in the SFX database. Additionally, you can use the tool to add local attributes and titles to objects or to add local objects.

While you use the tools in KBManager for the overall management of the SFX database, you typically use DataLoader for batch data loading.

This section includes the following:

- **Preparing the Data File** on page 162
- **Portfolios** on page 165
- **Update Objects** on page 170

- [Add/Remove Objects](#) on page 174
- [DataLoader Report and Log Files](#) on page 181
- [DataLoader Error Handling](#) on page 183
- [Using Excel to Create Local Thresholds](#) on page 187

To start DataLoader, from the KBTools section of the Data Management area, click **DataLoader**. The following window opens:

ExLibris SFX  
OpenURL Generator | Log Off  
Home | KBManager | **KBTools** | Statistics | Troubleshooting  
DataLoader | Export Tool | Collection Tool

### Welcome to DataLoader

**Portfolios** | Update Objects | Add/Remove Objects

#### Specify input file/target service

Select Target + Service:

Select institute/group (optional):

Specify input file name:  **Browse...**

Specify input file format:  Dataloader TXT format  KBART format

#### Specify content of the input file

Select the type of each column in your input file:

Column 1 (Primary Key) <input type="text"/>	Column 2 <input type="text"/>	Column 3 <input type="text"/>
Column 4 <input type="text"/>	Column 5 <input type="text"/>	Column 6 <input type="text"/>
Column 7 <input type="text"/>	Column 8 <input type="text"/>	Column 9 <input type="text"/>

#### Specify load type

Load Type

- Add Portfolios
- Update Portfolios
- Remove Portfolios
- Activate targets(s) / target\_service(s)
- Report Mode - Do Not Update the Database

**Submit**

Figure 80: DataLoader



DataLoader contains three sections and can be used for different types of data loading.

- **Portfolios**

The following activities can be performed from the Portfolios section:

- **Activating or deactivating object portfolios**

Customization of the SFX database is performed by activating all the sources, targets, services, and object portfolios that are relevant to an institution's digital library environment. DataLoader can be used to activate or deactivate object portfolios.

- **Storing thresholds in the OBJECT\_PORTFOLIO table**

Thresholds in an object portfolio describe the conditions placed on an SFX request when used to link to a service. Journals, for example, may be available only in electronic form for a specific range of publication years, volumes, and issues. When an SFX request is used to link to these journals, these special conditions apply to the SFX request and are taken into account.

- **Creating local object portfolios**

An object portfolio links objects to services. SFX scripts use the object portfolios for the object lookup threshold. This threshold causes SFX to not display a journal in the SFX menu when the SFX request does not describe any journal in the collection of a publisher.

- **Update Objects**

The following local information can be added to the SFX OBJECT tables:

- **Local attributes**

It is possible to add customer specific, local data to the OBJECT tables by storing local identifiers. Examples of local information that can be useful are EZB numbers, local catalog ID numbers, ERM, and database IDs. These local identifiers can be assigned to all the SFX objects (journals and books) in the SFX KnowledgeBase.

- **Local titles**

It is possible to override the main Ex Libris title in the SFX database by loading a local title. These local titles can be assigned to all the SFX objects (journals and books) in the SFX KnowledgeBase.

For the local titles, it is possible to load a non-filing character value that is taken into account when sorting the local title in the SFX A-Z list. By default, or when no non-filing character is loaded, the value is 0.

- **Add/remove objects**

It is possible to add local objects to the SFX database.

For these local objects, it is possible to load language information, local attributes, local titles, author information, and non-filing characters. Additionally, it is possible to load ISSN, ISBN, DOI, CODEN, and OCLC numbers.

## Preparing the Data File

You can input data to DataLoader either as a tab-delimited text file or in KBART format.

### Tab-Delimited Text File

You can input data to DataLoader in a tab-delimited text file, containing the information that needs to be loaded into the SFX database. The file must be created in Microsoft Excel, and then saved as a tab-delimited text file. The first column should contain an identifier of the object. This identifier is called the primary key and can be the ISSN, ISBN, LCCN, Object ID, or OCLC number of the object. Only one primary key type can be used per input file.

The other columns should contain the information you want to load into SFX for the object, such as the object's activation status (ACTIVE or INACTIVE), a threshold for the object, or a general note concerning the object. You configure in DataLoader what kind of information is contained in each column of the file.

When loading object portfolio information, prepare a separate data file for each target or target service. For example, create a data file that contains all the Wiley full-text journals to which your institution subscribes. Create another data file for Springer full-text journals.

The `ACTIVATION_STATUS` attribute accepts the values `ACTIVE` or `INACTIVE` (case-sensitive) in the corresponding field or column in the load file. Other attributes accept the values that are valid for Edit Portfolio form fields. For more information, see [Editing Object Portfolios](#) on page 81.

The following is an example of a data file containing object portfolio information:

```
0000-0001<Tab>$obj->parsedDate(">=",1997,12,1)<tab>ACTIVE
0000-0002<Tab>$obj->parsedDate(">=",1999,undef,2)<tab>ACTIVE
0000-0003<Tab>$obj->parsedDate(">=",1998,79,1)<tab>ACTIVE
```

The first column contains the object's ISSN, the second column contains a threshold to be loaded to the object, and the third column contains the activation status to be set in the object.

---

**IMPORTANT:**

When saving the file, the name of the file cannot contain spaces.

---

## **KBART**

You can input data to DataLoader in KBART format. This allows you to load files received from vendors without additional manipulation prior to loading. It also provide you with a way to load date coverage information without constructing Perl statement thresholds.

The following conditions apply to the KBART format:

- The file must be in tab-delimited TXT format.
- All metadata is provided as plain text
- Text should be encoded as UTF-8.
- The first row is a header row with a field label for each column that indicates the content of the field.
- There should not be a blank row between the column header and the first row of content
- The order of the columns in the KBART format does not matter as long as the column header is correct for each column. Additional columns are ignored.
- Each publication is given a separate line of the file, with a column for each field.
- A publication is listed twice if there is a coverage gap of greater than or equal to 12 months, with only the coverage field changing. SFX dataloader merges the different coverage ranges into one threshold statement.
- All rows should be in the same format.

Dataloader uses the following columns in the KBART file to build the SFX Perl threshold statements:

- num\_first\_vol\_online
- num\_first\_issue\_online
- date\_last\_issue\_online
- num\_last\_vol\_online
- num\_last\_issue\_online
- embargo\_info

The following table describes the columns of the KBART format:

Table 14. KBART Format

Column	Description
publication_title	Publication title
print_identifier	Print-format identifier (for example, ISSN, ISBN, etc.)
online_identifier	Online-format identifier (for example, eISSN, eISBN, etc.)
date_first_issue_online	Date of first issue available online
num_first_vol_online	Number of first volume available online
num_first_issue_online	Number of first issue available online
date_last_issue_online	Date of last issue available online (or blank, if coverage is to present)
num_last_vol_online	Number of last volume available online (or blank, if coverage is to present)
num_last_issue_online	Number of last issue available online (or blank, if coverage is to present)
title_url	Title-level URL
first_author	First author (for monographs)
title_id	Title level JKEY
embargo_info	<p>Embargo information. Consists of 3 parts:</p> <ul style="list-style-type: none"> <li>■ type – can be: <ul style="list-style-type: none"> <li>■ R – available</li> <li>■ P – not available</li> </ul> </li> <li>■ length (digits)</li> <li>■ units – can be: <ul style="list-style-type: none"> <li>■ D – days</li> <li>■ M – months</li> <li>■ Y – years</li> </ul> </li> </ul> <hr/> <p><b>NOTE:</b> The units field also indicates the granularity of the embargo, that is, how frequently the moving wall moves.</p>

Table 14. KBART Format

Column	Description
coverage_depth	Coverage depth, can be: <ul style="list-style-type: none"> <li>■ fulltext</li> <li>■ abstracts</li> <li>■ selected articles</li> </ul>
coverage_notes	Coverage notes
publisher_name	Publisher name (if not given in the file's title)

**NOTE:**

KBART fields not listed in this table (such as fields added as part of KBART II) can be included in the load file but is ignored by SFX DataLoader.

## Portfolios

You can use DataLoader to import batch records of object portfolios into SFX.

### To import batch records of object portfolios:

- 1 On the DataLoader menu bar, click **Portfolios**.
- 2 From the **Select Target+Service** drop-down list, select the target service whose object portfolios you want to update.  
If a target has multiple subtargets, a second drop-down list is displayed.
- 3 From the **Select sub-target + service** drop-down list, select one of the following:
  - All sub-targets
  - All sub-targets for a specific service type (for example, full-text), if multiple service types are available
  - A specific sub-target

**Specify input file/target service**

Select Target + Service: ALLEN\_PRESS-getFullTxt ▼

Select subtarget + Service: All Sub-targets ▼

Select institute/group (optional): ▼

Specify input file name:  Browse...

Specify input file format:  Dataloader TXT format  KBART format

Figure 81: Select Sub-target

- 4 To specify the input file name, click the **Browse** button and select the tab-delimited file on your hard disk. The file is generally located in the scratch directory (`exlibris/sfx_ver/sfx4_1/<sfx_instance>/dbs/scratch`) of the SFX instance:

---

**NOTES:**

- To update object portfolio information, the object must be connected to a specific target or target service.
- The input file must be located on your local hard disk.

- 
- 5 Select an institute or group.

This option allows you to update, add, and remove portfolio information for a specific institute or group. The option appears only if institutes are set up in the instance. (For more information about institutes, .)

- 6 Select an input file format.

- 7 Perform the following steps depending on whether you select **Dataloader txt format** or **KBART** format:

- For Dataloader txt format:

- a Select an identifier type for the first column of the input file.

The first column contains a unique identifier called the primary key that exists for each line in your data file. There are several different types of primary keys. Select one identifier for each data file:

- The ISSN number of the journal
- The ISBN number of the book
- The LCCN number of the journal, if no ISSN exists
- The object ID – the unique number used to identify an object in the SFX database

- The OCLC number of the object

For example, selecting ISSN as the primary key means that each line of the data file contains an ISSN. DataLoader checks each primary key in the data file. If an eISSN is found, it is replaced by the corresponding ISSN value.

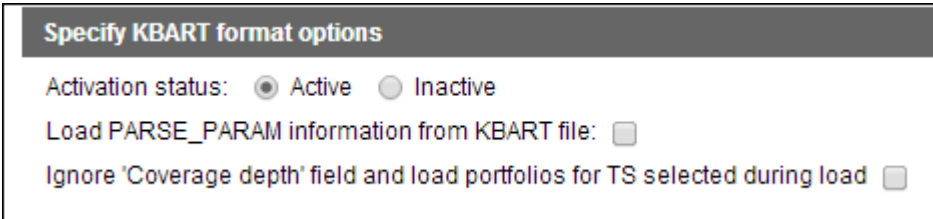
The primary key type must exist in the `OBJECT` table. If the value is not found in the database, the data in this line is not loaded and object portfolios cannot be created. If this problem occurs, send the list of values not present in the database to Ex Libris. They will be added to the global database in the next update.

- b From the drop-down list of the other columns, select one of the following options:

- THRESHOLD
- TARGET\_PARSER\_PROGRAM
- PARSE\_PARAM
- ACTIVATION\_STATUS
- AUTHENTICATION\_NOTE
- GENERAL\_NOTE
- INTERNAL\_DESCRIPTION

- For KBART format:

The following options are displayed:



**Specify KBART format options**

Activation status:  Active  Inactive

Load PARSE\_PARAM information from KBART file:

Ignore 'Coverage depth' field and load portfolios for TS selected during load

- a Select the activation status of the portfolios in the file
- b If you are using the KBART file to add or update `PARSE_PARAM` information for the portfolios (for example, when adding or updating local portfolios), select **Load PARSE\_PARAM information from KBART file**. Select one of the following options to use as the `jkey`:
  - TITLE\_URL

- **TITLE\_ID**

DataLoader loads the following PARSE\_PARAM information for each portfolio, depending on the option you select:

jkey=<TITLE\_URL> or jkey=<TITLE\_ID>

- c To ignore the Coverage Depth field and load all of the portfolios, regardless of the value in the `coverage_depth` field, select **Ignore Coverage Depth field and load portfolios for TS selected during load**; otherwise only the following portfolios are loaded:
  - When loading portfolios for one or more `getFullTxt` services – only the rows in the KBART file that have `fullText` or a blank value in the `coverage_depth` column
  - When loading portfolios for one or more `getAbstract` or `getTOC` service – only rows in the KBART file that have `abstracts` or a blank value in the `coverage_depth` column
  - When loading portfolios for one or more `getSelectedFullTxt` services – only rows in the KBART file that have `selected articles` or a blank value in the `coverage_depth` column

- 8 Specify the load type. Note that one of the first three load types listed must be selected.

Specify load type	
Load Type	<input type="checkbox"/> Add Portfolios
	<input type="checkbox"/> Update Portfolios
	<input type="checkbox"/> Remove Portfolios
	<input type="checkbox"/> Activate targets(s) / target_service(s)
	<input type="checkbox"/> Report Mode - Do Not Update the Database

Figure 82: Load Type

- **Add Portfolios** – Add new object portfolios to the selected target service if no object portfolios exist.
- **Update Portfolios** – Update portfolio information such as thresholds, activation status, and parse param information. For more information about updating portfolios, see [Updating Portfolios](#) on page 169.
- **Remove Portfolios** – Delete portfolios.
- **Activate targets / target services** – Activate both the target and target service for the portfolios being added or updated. Note that this option cannot be specified by itself. One of the first three load types must also be selected.



- **Report Mode** – Produces a report but does not update the database. Note that the Report Mode cannot be specified by itself. One of the first three load types must also be selected.
- 9 To start the loading process, click **Submit**.

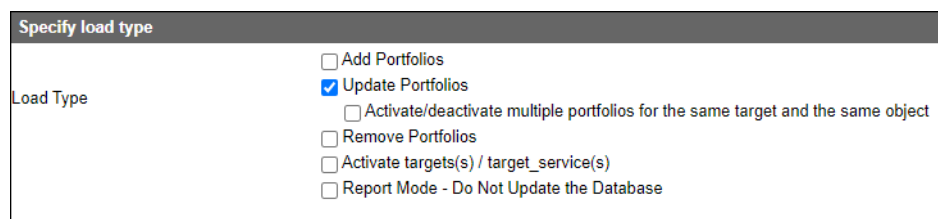
---

**NOTES:**

- Adding and deleting of multiple portfolios for the same target service and the same object is not possible via DataLoader.
  - For institutes, you can load only `ACTIVATION_STATUS` and `THRESHOLD` data.
  - It is not possible to create new portfolios when loading institute information.
  - Leave the field blank if you want to ignore the data contained in that field.
  - To reset a specific field, type `NULL` between the two tabs.
  - The maximum length of a threshold is 2048 characters.
- 

## Updating Portfolios

You can update multiple portfolios for the same target service and the same object is possible via DataLoader, for both KBART and TXT format. To do this, select the **Update Portfolios** load type. The **Activate/Deactivate multiple portfolios for the same target and the same object** option appears:



The screenshot shows a dialog box titled "Specify load type". On the left, there is a label "Load Type" next to a text input field. On the right, there is a list of options with checkboxes:

- Add Portfolios
- Update Portfolios
- Activate/deactivate multiple portfolios for the same target and the same object
- Remove Portfolios
- Activate targets(s) / target\_service(s)
- Report Mode - Do Not Update the Database

Figure 83: Update Portfolios

---

**NOTE:**

To identify the correct portfolio to update, SFX uses two methods: via the `parse_param` field and via the `threshold` field.

---

Selecting this option affects all portfolios in the load file, if multiple object portfolios for the same target and the same object exist.

If this option is selected and dataloader finds that there are multiple object portfolios for the same target and the same object, when activating/deactivating

the portfolios, the PARSE\_PARAM field is checked to determine which object portfolios should be updated, activated, or deactivated.

- If a match is found in the PARSE\_PARAM information in load file versus portfolio field, the portfolio identified is activated/deactivated.
  - For the parse\_param field comparison, first the entire parse\_param is compared. If no match is found, only the jkey's or the bkeys are matched if they exist in the parse\_param.
  - Blank parse\_params are compared like a string (two blank parse\_params are matched).
- If no match is found in the PARSE\_PARAM information (either because there is no PARSE\_PARAM in the file or it does not match), thresholds are checked.

---

**NOTE:**

The threshold matching works only for activation/deactivation (change of AVAILABILITY\_STATUS from ACTIVE to INACTIVE or vice versa) – not for other types of updates.

---

- The active threshold in the portfolio is checked against the load file threshold. If the thresholds are identical, this is considered a match and the portfolio is updated.
- If no match is found, the portfolio is not updated.

---

**NOTE:**

For the KBART input format, the comparison between portfolio and the load file is done after the date/volume/issue from KBART file is converted into an SFX threshold statement.

---

## Update Objects

You can update objects using DataLoader. The input file must be prepared as described in [Preparing the Data File](#) on page 162.

### To update objects:

- 1 On the DataLoader menu bar, click **Update Objects**.
- 2 Select an input file.
- 3 Select a primary key.
- 4 Specify the field names of data in the input file. Allowed fields are:
  - OBJECT\_TYPE
  - LOCAL
  - TITLE\_LANGUAGE

- TITLE\_TYPE
  - TITLE\_VALUE
  - TITLE\_NON\_FILING\_CHAR
  - TITLE\_LANGUAGE
  - AUTHOR
  - PUBLICATION\_DATE
  - PUBLICATION\_PLACE
  - PUBLISHER
- 5 Select a load type.
  - 6 Click **Submit**.

---

**NOTE:**

If the value for the TITLE\_TYPE field is TRANSLATION, you need to provide a value for the TITLE\_LANGUAGE field as well.

---

Only one value can exist for each field. From **Load Type**, select one of the following options if you are attempting to load a value to a field that already has one:

- **Keep Existing Attributes** – The field values already in the KnowledgeBase are retained and the values in the input file are ignored.
- **Overwrite Existing Attributes** – The values already in the KnowledgeBase are replaced by the values in the input file.
- **Remove Attributes** – The values in the KnowledgeBase are removed.

### **Loading Values to the LOCAL Field**

Using DataLoader, it is possible to add customer-specific, local data to the OBJECT table by storing information in the LOCAL field. Examples of local information which may be useful are EZB numbers, local catalog ID numbers, and ERM database IDs. These local identifiers can be assigned to all the SFX objects (journals and books) in the SFX KnowledgeBase.

Local information can be useful:

- When exporting information from the SFX KnowledgeBase (for example, for matching SFX journals with other databases, such as OPAC)
- During linking (target parsers can be written to use local information when creating target URLs)

In the following example, a local identifier has been added to the LOCAL field of the following object in the SFX KnowledgeBase:

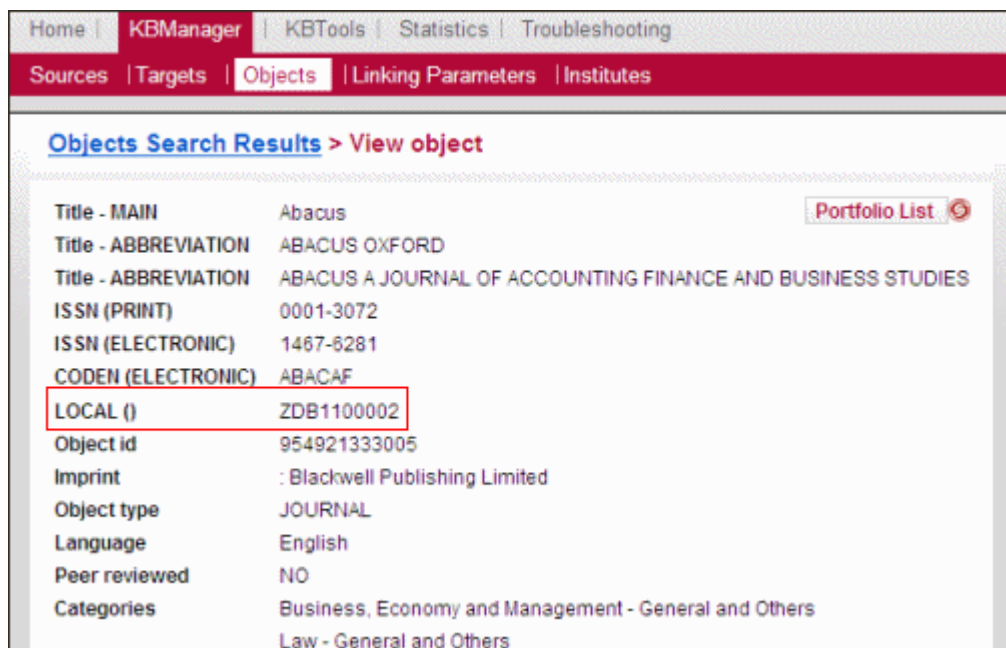


Figure 84: Local Field with Identifier

When an OpenURL is sent to SFX, SFX includes the local identifier as part of the context object (CTXO). (For more information about the CTXO, refer to the **Context Object** section of the *SFX Advanced User's Guide*.)

During a look-p in the SFX database, the LOCAL field is found and stored as part of the CTXO. For example:

```
rft.local_attribute' => 'ZDB1100002
```

### Loading Local Titles

It is possible to override the Ex Libris title in the SFX database by loading a local title. These local titles can be assigned to all the SFX objects (journals and books) in the SFX KnowledgeBase.

#### To load a local title:

- 1 Select the input file.
- 2 Select a primary key.
- 3 Specify the **TITLE\_TYPE** data field name. The following are possible title types:
  - MAIN
  - MAIN-TRAD-CHI

- MAIN-SIMP-CHI
  - MAIN-PINYIN
  - MAIN-KOREAN
  - MAIN-HANGUL
  - MAIN-JAPAN
  - MAIN-KANA
  - ABBREVIATION
  - ALTERNATIVE
  - TRANSLATION
  - UNIFORM
- 4 Specify the **TITLE\_VALUE** data field name.
  - 5 Specify the **TITLE\_NON\_FILING\_CHAR** data field name.
  - 6 Select a load type.
  - 7 Click **Submit**.

---

**NOTE:**

More information on the **LANGUAGE** and **TITLE** fields can be found in **Add/Remove Objects** on page 174.

---

### **Update Objects - Examples**

- Loading EZB numbers to existing global objects with the **LOCAL** field:

```
0001-8708 1472893x
0001-8791 1470972-7
```

The first column of the input file contains the ISSN and the second column contains a value for the **LOCAL** field.

- Loading local titles to existing global objects with the **LOCAL\_TITLE** field:

```
0001-8708 The journal of Medicine 4
0001-8791 Blood 0
```

The first column of the input file contains the ISSN, the second column contains a value for the **LOCAL\_TITLE** field, and the third column contains a value for the **TITLE\_NON\_FILING\_CHAR** field.

The **TITLE\_NON\_FILING\_CHAR** column should contain a number to indicate how many of the initial characters should be ignored during sorting. If the **TITLE\_NON\_FILING\_CHAR** column is empty, it is set to 0. DataLoader checks to make sure that the number in the

TITLE\_NON\_FILING\_CHAR column is not greater than the number of characters in the LOCAL\_TITLE field.

If the non-filing character number is greater than the number of characters in the LOCAL\_TITLE field, SFX ignores the number in the TITLE\_NON\_FILING\_CHAR column and uses the default non-filing character number 0 instead.

- Removing local attributes

For example, the input file contains OBJECT ID<tab>LOCAL:

```
9967854456611 8888456671
9967854456614 8888456670
```

## Add/Remove Objects

You can add and remove objects with DataLoader. The input file must be prepared as described in [Preparing the Data File](#) on page 162. When using this feature, keep in mind that:

- It is possible to add objects with TITLE and OBJECT TYPE identifiers such as ISSN and ISBN, and LOCAL attributes.
- When adding new objects, the input file needs to contain at least one other attribute besides OBJECT\_TYPE (such as TITLE and LOCAL).
- The TITLE\_NON\_FILING\_CHAR column should contain a number to indicate how many of the initial characters should be ignored during sorting. If the TITLE\_NON\_FILING\_CHAR column is empty, it is set to 0. DataLoader checks to make sure that the number in the TITLE\_NON\_FILING\_CHAR column is not greater than the number of characters in the title field.

If the non-filing character number is greater than the number of characters in the title field, SFX ignores the number in the TITLE\_NON\_FILING\_CHAR column and uses the default non-filing character number 0 instead.

- When adding objects, the LANGUAGE field is required for each object. It must be selected and have a value.

SFX uses the ISO 639-2 standard to represent languages. More information on the ISO 639-2 standard can be found at:

<http://www.loc.gov/standards/iso639-2/>

For a complete list of language codes, see:

[http://www.loc.gov/marc/languages/language\\_code.html](http://www.loc.gov/marc/languages/language_code.html)

- Multiple authors can be added in one column. Separate each other with ###. Separate the elements with a | . The order of the elements is:
  - author value (mandatory) – value can be Last, First, or FULL\_NAME

- type of author (optional) – values can be PERSONAL, CORPORATE, MEETING  
If not specified, the default PERSONAL is used.
- author significance (optional) – values can be MAIN, ADDITIONAL, ALTERNATIVE  
If not specified, the default ADDITIONAL is used.
- comment (CJK authors only) values can be:
  - For Chinese authors – TRADITIONAL-CHI, SIMPLIFIED-CHI, PINYIN
  - For Korean authors – KOREAN-UNSPEC, HANGUL
  - For Japanese authors – JAPANESE-UNSPEC, HIRAGANAFor all other author types, leave the comment field blank and it is saved in the DB with the LATIN value.

#### To add or remove local objects:

- 1 From the DataLoader menu bar, click **Add/Remove Objects**.
- 2 Select an input file.
- 3 Select a primary key:
  - OBJECT\_TYPE – Use when adding objects.
  - OBJECT\_ID – Use when removing objects.
  - ISSN – Use when removing objects.
  - ISBN – Use when removing objects.
  - OCLC\_NR – Use when removing objects.
- 4 If you are adding an object, select **LANGUAGE** for one of the columns and enter a value.
- 5 Specify the field names of data in the input file. The following fields are available:
  - LOCAL
  - TITLE\_LANGUAGE
  - TITLE\_TYPE
  - TITLE\_VALUE
  - TITLE\_NON\_FILING\_CHAR
  - LANGUAGE (required when adding objects)
  - ISSN
  - EISSN

- ISBN\_ELECTRONIC
  - ISBN\_HARDBACK
  - ISBN\_PAPERBACK
  - LCCN
  - OCLC\_NR
  - CODEN
  - DOI
  - AUTHOR
  - PUBLICATION\_DATE
  - PUBLICATION\_PLACE
  - PUBLISHER
- 6 Select a load type.
  - 7 Click **Submit**.

### **Title Loading**

- **For all non-CJK language objects** – Use the TITLE\_TYPE, TITLE\_VALUE, and TITLE\_NON\_FILING\_CHAR (optional but not required) fields for each title to be loaded. For each title, include TITLE\_TYPE before TITLE\_VALUE. The TITLE\_LANGUAGE field can be used, but is not required, except when loading TRANSLATION type titles.

Additionally, the following are possible values for TITLE\_TYPE:

- MAIN
- ABBREVIATION
- ALTERNATIVE
- UNIFORM
- TRANSLATION

Use MAIN as the TITLE\_TYPE for each locally created object.

---

#### **NOTE:**

If the value for the TITLE\_TYPE field is TRANSLATION, you need to provide a value for the TITLE\_LANGUAGE field as well.

---

- **For all CJK language objects** – Multiple main titles need to be loaded for display purposes in the SFX menu and A-Z list, and also for searching, sorting, and grouping of CJK journals in the SFX A-Z list. For each title, provide the TITLE\_TYPE, TITLE\_VALUE, and



TITLE\_NON\_FILING\_CHAR (optional but not required) fields to be loaded. For each title, include TITLE\_TYPE before the TITLE\_VALUE.

Additionally, the following are possible values for TITLE\_TYPE:

- TRANSLATION
- ABBREVIATION
- UNIFORM
- ALTERNATIVE

SFX uses the ISO 639-2 standard to represent languages. The values for CJK languages are `chi` for Chinese language objects, `jpn` for Japanese language objects, and `kor` for Korean language objects.

More information on the ISO 639-2 standard can be found at:

<http://www.loc.gov/standards/iso639-2/>

For a complete list of language codes, see:

[http://www.loc.gov/standards/iso639-2/php/code\\_list.php](http://www.loc.gov/standards/iso639-2/php/code_list.php)

- Chinese – For objects with the language value `chi`, the following title types are required:
  - For customers with the country setting `China`:
    - MAIN-SIMP-CHI – contains the Simplified Chinese version of the title
    - MAIN-PINYIN – contains the Pinyin transliteration of the title
  - For customers with the country setting `Taiwan`:
    - MAIN-TRAD-CHI – contains the Traditional Chinese version of the title

To set the country setting of an instance, click **A-Z List** from the Configuration section of the Setup & Administration area and select a language from the Language section.

- Korean – For objects with the language value `kor`, the following title types are required:
  - MAIN-KOREAN – contains the original Korean title in Hanja, Hangul, or another script.
  - MAIN-HANGUL – contains the normalized Hangul version of the title
- Japanese – For objects with the language value `jpn`, the following title types are required:
  - MAIN-JAPAN – contains the original Japanese title in Kanji and/or Hiragana and/or Katakana.
  - MAIN-KANA – contains the Katakana or Hiragana title

## **Author Loading**

Author information can be added when loading new objects via dataloader (via the Add/Remove objects section) or when updating existing local or global objects (via the update objects section).

One or more authors can be added to all monograph types of objects. The following monograph types can be added by customers to the SFX KB:

- BOOK
- CD
- DATABASE
- DISSERTATION
- DOCUMENT
- MANUSCRIPT
- PROCEEDING
- REPORT

Author information in the SFX KnowledgeBase is similar to the fields in the MARC standard for describing author information:

- Author type – values can be PERSONAL, CORPORATE, and MEETING  
For example: Smith, Johan (personal author), Ex Libris Ltd. (corporate author), Congress of Neurological Surgeons (Meeting author)
- Author significance – values can be MAIN, ADDITIONAL, and ALTERNATIVE
  - Each book can have one MAIN author and multiple ADDITIONAL authors. If no main author exists for a book object (or if it is not clear from the load file which author is the main author), it is possible to load only additional authors. In this case, the first additional author is used as the main author for display purposes.
  - ALTERNATIVE authors (not part of the MARC standard) are used by SFX to store CJK author variations. These authors are not displayed in end-user applications (such as the SFX menu and SFX menu displays, target parsers, the A-Z list, and the CitationLinker multi-object window) and they are not included in the export formats.

## **Author Loading – Examples**

- The following is an example of author loading when updating objects:
  - Load type: Overwrite Existing Attributes
  - File format: OBJECT\_ID<tab>AUTHOR

■ Example:

```
1000000000546314<tab>Morel, J.-M.|PERSONAL|MAIN###Roth,  
Walter|PERSONAL|ADDITIONAL  
1000000000546318<tab>Sprinker Link (Online service)|CORPORATE  
1000000000546316<tab>Takens, F.|PERSONAL|MAIN###Teissier,  
B.|PERSONAL  
1000000000546319<tab>Rottiers, L.||MAIN  
1000000000546316<tab>Takens, F.
```

■ The following is an example of author loading when adding objects:

■ Load type: Add objects

■ File format:

```
OBJECT_TYPE<tab>ISBN_HARDBACK<tab>ISBN_ELECTRONIC<tab>  
LANGUAGE<tab>TITLE_TYPE<tab>TITLE_VALUE<tab>AUTHOR
```

■ Example:

```
BOOK<tab>0123456789<tab>1234567890<tab>eng<tab>MAIN<tab>Test  
Title 1<tab>Adams, John|PERSONAL|MAIN  
BOOK<tab>0123456788<tab>1234567899<tab>eng<tab>MAIN<tab>Test  
Title 2<tab>Philips, E.|PERSONAL|MAIN
```

## Add/Remove Objects – Examples

The following are examples of adding and removing objects.

### To create an input file to add local objects:

1 Select **OBJECT\_TYPE** for the primary key (first column). The following values are valid for OBJECT\_TYPE:

- JOURNAL
- BOOK
- DISSERTATION
- PROCEEDING
- CONFERENCE
- REPORT, DOCUMENT
- SERIES
- NEWSPAPER
- TRANSCRIPT
- DATABASE
- WIRE
- CD

- MANUSCRIPT
- VIDEO
- AUDIO
- SCORE

2 Select **LANGUAGE** for one of the columns and enter a value.

The other columns can contain any of the following fields:

LOCAL, TITLE\_LANGUAGE, TITLE\_TYPE, TITLE\_VALUE,  
TITLE\_NON\_FILING\_CHAR.

The DataLoader program assigns OBJECT\_IDs to the new objects.

#### **To create an input file format to remove local objects:**

Select OBJECT\_ID as the primary key (first column). No other columns are required. The DataLoader program removes the OBJECT\_IDs and all attributes, portfolios, and institute entries connected to the new objects.

## **Target CDI Discovery Activation**

You can activate and deactivate targets for CDI discovery with DataLoader.

---

#### **NOTE:**

This section is relevant only for customers using the Primo discovery system and CDI.

---

The feature can be used to activate/deactivate targets available for CDI discovery activation. Targets not available for CDI discovery activation are ignored during the load. For more information about target activation for CDI, see Target Activation for CDI in SFX – Overview.

#### **To activate or deactivate SFX targets for CDI discovery:**

- 1 Specify the input file name. The file must be a tab-delimited TXT file with a list of SFX Target IDs. For a list of target names and IDs that can be activated for CDI Discovery in Excel format, see CDI Collection Lists for SFX Customers.
- 2 Specify the load type. It is possible to either activate targets for CDI discovery or deactivate them.  
  
Additionally, it is also possible to run DataLoader in report mode. This only generates a report and does not update the SFX database.
- 3 Click **Submit**.

## DataLoader Report and Log Files

After each loading process, a report is generated.

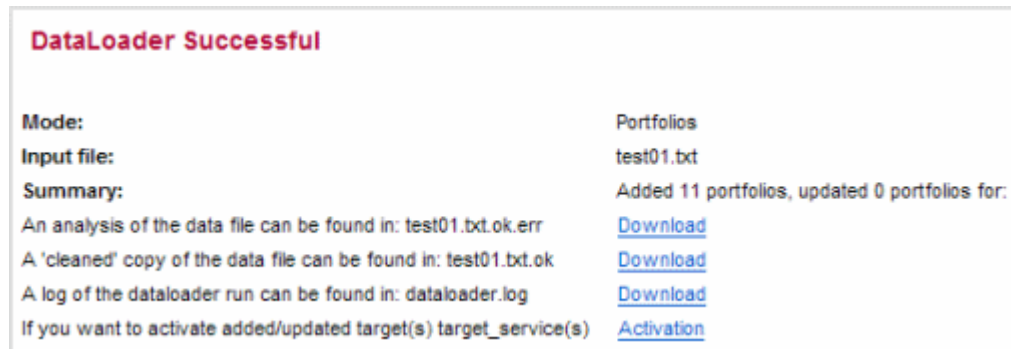


Figure 85: DataLoader Report

The report contains links to a number of files that can be used for analysis. Open these files using Excel, Word, or a text editor. You can also choose to save them to your hard disk for later use.

### Analysis of the Data File

This file contains information about the analysis of the primary keys in the data file as well as information about which object portfolios have been added or updated.

The following is an example of a report file:

```
Report Translate      076-836X      Translated 1076-836X into 1063-5157
Report Translate      1077-3118     Translated 1077-3118 into 0003-6951
Report NotExist       1471-4892     Object not in database
Report Added          0003-6951     New Portfolio added
Report Added          1063-5157     New Portfolio added
```

This report shows that:

- Two eISSN values have been replaced with the corresponding ISSN values. The ISSN values will be loaded.
- One ISSN has not been found in the SFX database; it will not be loaded. Inform Ex Libris about this and it will be added to the database in the next update.
- Two new object portfolios have been added.

The following is an example of a report file for updated object portfolios:

```
Report Updated 0936-8051 Updated portfolio with id=385000000002481
VG_SPRINGER_LINK_JOURNALS getFullTxt Archives of Orthopaedic and
Trauma Surgery Deactivated

Report Updated 0340-5761 Updated portfolio with id=385000000002484
VG_SPRINGER_LINK_JOURNALS getFullTxt Archives of Toxicology
Deactivated

Report Updated 1434-1816 Updated portfolio with id=385000000002486
VG_SPRINGER_LINK_JOURNALS getFullTxt Archives of Women's Mental Health
ACTIVE:No-change

Report 0933-7946 Updated portfolio with id=385000000002491
VG_SPRINGER_LINK_JOURNALS getFullTxt Arthroskopie ACTIVE:No-change
```

This report shows that:

- Two object portfolios have been updated and deactivated
- Two object portfolios have not been changed and remain active

The location and name of the report file are specified by DataLoader. For example

```
exlibris/sfx_ver/sfx4_1/sfxlcl4/dbs/scratch/test.txt.ok.err
```

If **Report Mode** is selected, no changes are made in the SFX database. The log file contains information about changes which would have been made.

The following is an example of a report file:

```
Report Mode ReportMode
DataLoader is in Report Mode: this file contains a report of
what would be updated with this data file.
Report Added 1063-651X Added portfolio
with id=<TBD>
Report Added 0094-9930 Added portfolio
with id=<TBD>
Report Added 0892-7219 Added portfolio
with id=<TBD>
Report Total 3 Added 3
portfolios
Report Total 0 Updated 0
portfolios
```

The following is an example of the location and name of a cleaned copy of the data file used by the DataLoader to complete the data loading:

```
exlibris/sfx_ver/sfx4_1/sfxlcl4/dbs/scratch/test.txt.ok
```

### DataLoader Log

Each time DataLoader is used, the program writes information to the log file `dataloader.log`.

In the following example, you can see the information saved to the log file:

```
Wed May 16 13:55:23 2001: user 'local' connected to database
'local_01'
Wed May 16 13:55:23 2001: infile: test.txt
0 checksum and syntax errors in file
0 translated from eISSN into ISSN
Wed May 16 13:55:31 2001: Fields in data file are ISSN PARSER
THRESHOLD PARSE_PARAM
Total of 1 objects not in database
Wed May 16 13:55:31 2001: loadObject finished
Wed May 16 13:55:37 2001: user global tries to create
portfolio for target ALLEN_PRESS service 'getAbstract'
Wed May 16 13:55:39 2001: loadPortfolio started
Report Total    0      created 5 portfolios
Report Total    0      updated 82 portfolios
Wed May 16 13:55:42 2001: loadPortfolio finished
Wed May 16 13:55:42 2001: Finished
```

### DataLoader Error Handling

The following error messages may be displayed by DataLoader:

#### General Errors When Starting DataLoader

Table 15. General Problems When Starting DataLoader

Error Message	Explanation
Missing required parameter	Loading parameter is missing
Input file is required	No input file is specified
You must select a Target Service	No target service is selected
Cannot write to file	Problem with the instance scratch directory in the location where the input file will be placed
Database Error	Problem with database connection

Table 15. General Problems When Starting DataLoader

Error Message	Explanation
Failed to upload file	Problem uploading the input file to the SFX server

### **Errors When Checking the Validity of the Input File Primary Key Value**

Table 16. Errors When Checking the Validity of the Input File Primary Key Value

Error Message	Explanation
no <PRIMARY_KEY> found on line X	Primary key is missing
<ul style="list-style-type: none"> <li>■ Not a valid &lt;PRIMARY_KEY&gt; on line X</li> <li>■ Not a valid &lt;PRIMARY_KEY&gt; (&lt;PRIMARY_KEY_VALUE&gt; is not a valid value)</li> </ul> <hr/> <p><b>NOTE:</b> Checksum errors in ISSN and ISBN are allowed.</p>	Invalid primary key (according to definition of the attribute in config/ctx_attrib.config_)

### **Error When Checking Validity of Other Input File Values**

Table 17. Error When Checking Validity of Other Input File Values

Error Message	Explanation
Column X is not a valid value for <INPUT_FILE_FIELD_NAME> ('<VALUE>' is not a valid value)	<p>Invalid non-primary key value. Can occur for ACTIVATION_STATUS, OBJECT_TYPE, and LANGUAGE fields.</p> <ul style="list-style-type: none"> <li>■ ACTIVATION_STATUS – Only ACTIVE/INACTIVE/THRESHOLD are allowed values.</li> <li>■ LANGUAGE – Only the three letter language codes defined in the standard are allowed values.</li> </ul>



### **Error When Matching Primary Key from Input File with OBJECT\_ID**

Table 18. Error When Matching Primary Key from Input File with OBJECT\_ID

<b>Error Message</b>	<b>Explanation</b>
No object with that <PRIMARY_KEY> found	No corresponding object is found in the database.

### **Error When Updating or Deleting Portfolios**

Table 19. Error When Updating or Deleting Portfolios

<b>Error Message</b>	<b>Explanation</b>
No portfolio with that <PRIMARY_KEY> found	No object portfolio is found in the database.

### **Errors When Updating or Deleting Institute Activation Entries**

Table 20. Errors When Updating or Deleting Institute Activation Entries

<b>Error Message</b>	<b>Explanation</b>
<ul style="list-style-type: none"> <li>■ No institute entry found for &lt;institute_name&gt;</li> <li>■ You can only load the 'ACTIVATION_STATUS' and 'THRESHOLD' columns when using institute/group</li> </ul>	No institute entry is found in the database.

### **Errors When Adding Objects**

Table 21. Errors When Adding Objects

<b>Error Message</b>	<b>Explanation</b>
Cannot add object with no attributes on line X	Minimum required data for a new object is not provided. DataLoader checks that there is at least one attribute besides OBJECT_TYPE in the input file.

## Errors When Updating or Deleting Objects

Table 22. Errors When Updating or Deleting Objects

Error Message	Explanation
No object with that <PRIMARY_KEY> found	No object is found in the SFX database.
Failed to remove object: Cannot remove non-local Object	The object is a global object.
Ignoring OBJECT_TYPE for non-local object	The input file contains an OBJECT_TYPE value for a global object that cannot be updated.
Report Invalid row the title type MAIN- is missing	The object is missing a TITLE.
Report Missing Key No OBJECT_TYPE found	The object is missing an OBJECT_TYPE.
Report Invalid row 0003-0007 of type ISSN-PRINT duplicate to object id 954925377920	The ISSN already exists for a different object.
Report NotLocal 0003-0007 Cannot remove non-local Object	An attempt was made to remove a global object.
Report Invalid row Object identifier_type ISBN does not match object type JOURNAL.ISBN 1509-0515 is not valid.	The object has both an ISSN and an ISBN.
Report Invalid row ISBN 1596-9827 is not valid	The ISBN of the object is in an incorrect format.
Report Invalidrow the title type WRITING_SYSTEM-Hangul is missing.	The CJK object is missing a required title of type Hangul.

Table 22. Errors When Updating or Deleting Objects

Error Message	Explanation
Report Invalidrow the title type WRITING_SYSTEM- Hanja is missing.	The CJK object is missing a required title of type Hanja.
Report Invalidrow the title type ROMANIZATION-Pinyin is missing	The CJK object is missing a required title of type ROMANIZATION-Pinyin.

## Using Excel to Create Local Thresholds

You can use formulas in Excel to create local thresholds to use in DataLoader.

### Creating the Input File

Create an Excel spreadsheet with the ISSNs in the first column (column A). You can use the journal names in column B to aid in identification (optional). The third column should contain the value `ACTIVE` (case-sensitive) if you also want to activate the portfolios for these journals during the same action (optional).

	A	B	C	D
1	0949-5932	Journal of Lie Theory	ACTIVE	
2	0733-5210	Journal of Cereal Science	ACTIVE	
3	1473-0197	Lab on a Chip	ACTIVE	
4	0971-3328	Journal of Spices of Aromatic Spices	ACTIVE	
5	0891-5946	Hay and Forage Grower	ACTIVE	
6	0733-3196	The footloose Librarian	ACTIVE	
7				
8				
9				

Use the next three columns to input the years, volumes, and issues of the journals.

	A	B	C	D	E	F
1	0949-5932	Journal of Lie Theory	ACTIVE	2001	23	1
2	0733-5210	Journal of Cereal Science	ACTIVE	1999	2	1
3	1473-0197	Lab on a Chip	ACTIVE	1995	11	1
4	0971-3328	Journal of Spices of Aromatic	ACTIVE	2000	5	2
5	0891-5946	Hay and Forage Grower	ACTIVE	1997	2	1
6	0733-3196	The footloose Librarian	ACTIVE	1997	44	1
7						

There are two methods for creating the input file.

### Method 1

- 1 Leave blank columns to the left of each of these numerical values.

	C	D	E	F	G	H	I
1	ACTIVE		2001		23		1
2	ACTIVE		1999		1		1
3	ACTIVE		1995		11		1
4	ACTIVE		2000		5		2
5	ACTIVE		1997		2		1
6	ACTIVE		1997		44		1
7							

- 2 Enter the following value in the D1 cell (the first part of the local threshold):

```
$obj->parsedDate(">=",
```

- 3 Use the **Fill** feature in Excel to populate the column (use the fill handle at the right bottom side of each selected cell or use **Edit > Fill Down**).

	C	D	E	F	G	H	I
1	ACTIVE	\$obj->parsedDate(">=",	2001		23		1
2	ACTIVE	\$obj->parsedDate(">=",	1999		1		1
3	ACTIVE	\$obj->parsedDate(">=",	1995		11		1
4	ACTIVE	\$obj->parsedDate(">=",	2000		5		2
5	ACTIVE	\$obj->parsedDate(">=",	1997		2		1
6	ACTIVE	\$obj->parsedDate(">=",	1997		44		1
7							

- 4 Do the same for cell F1, H1, and J1, inserting the values comma, comma, and end parenthesis.

	C	D	E	F	G	H	I	J
1	ACTIVE	\$obj->parsedDate(">=",	2001	,	23	,	1	)
2	ACTIVE	\$obj->parsedDate(">=",	1999	,	1	,	1	)
3	ACTIVE	\$obj->parsedDate(">=",	1995	,	11	,	1	)
4	ACTIVE	\$obj->parsedDate(">=",	2000	,	5	,	2	)
5	ACTIVE	\$obj->parsedDate(">=",	1997	,	2	,	1	)
6	ACTIVE	\$obj->parsedDate(">=",	1997	,	44	,	1	)
7								

- 5 In the column to the right of the last one, insert the following formula:

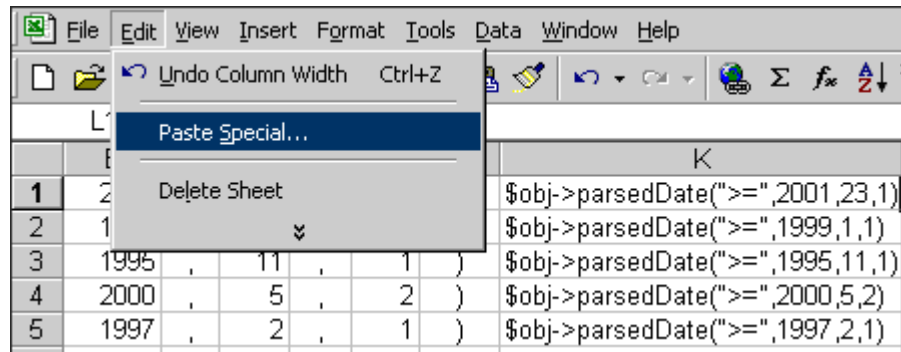
```
=D1&E1&F1&G1&H1&I1&J1
```

- 6 Use the **Fill** feature in Excel to populate the column (use the fill handle at the right bottom side of each selected cell or use **Edit > Fill Down**).

	D	E	F	G	H	I	J	K
1	\$obj->parsedDate(">=",	2001	,	23	,	1	)	\$obj->parsedDate(">=",2001,23,1
2	\$obj->parsedDate(">=",	1999	,	1	,	1	)	\$obj->parsedDate(">=",1999,1,1)
3	\$obj->parsedDate(">=",	1995	,	11	,	1	)	\$obj->parsedDate(">=",1995,11,1
4	\$obj->parsedDate(">=",	2000	,	5	,	2	)	\$obj->parsedDate(">=",2000,5,2)
5	\$obj->parsedDate(">=",	1997	,	2	,	1	)	\$obj->parsedDate(">=",1997,2,1)
6	\$obj->parsedDate(">=",	1997	,	44	,	1	)	\$obj->parsedDate(">=",1997,44,1
7								
8								
9								

You now have a syntactically correct date threshold. To complete the process, make sure the cells in this column become text values instead of formulas.

- 7 Select the column with the threshold values (click the letter at the top). Press <CTRL> +C to paste the material into the buffer.
- 8 Select the next column (click the letter at the top—in our example, column L).
- 9 From the **Edit** menu, select **Paste Special > Value**.



	G	H	I	J	K	L
1	23	,	1	)	\$obj->parsedDate(">=",2001,23,1)	\$obj->parsedDate(">=",2001,23,1)
2	1	,	1	)	\$obj->parsedDate(">=",1999,1,1)	\$obj->parsedDate(">=",1999,1,1)
3	11	,	1	)	\$obj->parsedDate(">=",1995,11,1)	\$obj->parsedDate(">=",1995,11,1)
4	5	,	2	)	\$obj->parsedDate(">=",2000,5,2)	\$obj->parsedDate(">=",2000,5,2)
5	2	,	1	)	\$obj->parsedDate(">=",1997,2,1)	\$obj->parsedDate(">=",1997,2,1)
6	44	,	1	)	\$obj->parsedDate(">=",1997,44,1)	\$obj->parsedDate(">=",1997,44,1)
7						

- 10 Delete all the workspace columns containing information you no longer need.

Moving extra data produces the following: columns A (ISSN), B (ACTIVE), and C (LOCAL THRESHOLD).

	A	B	C
1	0949-5932	ACTIVE	\$obj->parsedDate(">=",2001,23,1)
2	0733-5210	ACTIVE	\$obj->parsedDate(">=",1999,1,1)
3	1473-0197	ACTIVE	\$obj->parsedDate(">=",1995,11,1)
4	0971-3328	ACTIVE	\$obj->parsedDate(">=",2000,5,2)
5	0891-5946	ACTIVE	\$obj->parsedDate(">=",1997,2,1)
6	0733-3196	ACTIVE	\$obj->parsedDate(">=",1997,44,1)
7			
8			
9			

### Method 2

- 1 Insert a blank row at the top of the Excel file.

	A	B	C	D	E	F
1						
2	0949-5932	Journal of Lie Theory	ACTIVE	2001	23	1
3	0733-5210	Journal of Cereal Science	ACTIVE	1999	1	1
4	1473-0197	Lab on a chip	ACTIVE	1995	11	1
5	0971-3328	Journal of Spices and aromatic crops	ACTIVE	2000	5	2
6	0891-5946	Hay and Forage Grower	ACTIVE	1997	2	1
7	0733-3196	The Footloose librarian	ACTIVE	1997	44	1
8						

- 2 Insert the following value in the A1 cell:

```
$obj->parsedDate(">=",
```

	A	B	C	D	E	F
1	\$obj->parsedDate(">=",					
2	0949-5932	Journal of Lie Theory	ACTIVE	2001	23	1
3	0733-5210	Journal of Cereal Science	ACTIVE	1999	1	1
4	1473-0197	Lab on a chip	ACTIVE	1995	11	1
5	0971-3328	Journal of Spices and aromatic crops	ACTIVE	2000	5	2
6	0891-5946	Hay and Forage Grower	ACTIVE	1997	2	1
7	0733-3196	The Footloose librarian	ACTIVE	1997	44	1
8						

- 3 Insert the following formula in G2 cell:

```
=A$1&D2&"","&E2&"","&F2&"")"
```

- Use the **Fill** feature in Excel to populate the column (use the fill handle at the right bottom side of each selected cell or use **Edit > Fill Down**).

G2		= \$A\$1&D2&","&E2&","&F2&")"				
	C	D	E	F	G	
1						
2	ACTIVE	2001	23	1	\$obj->parsedDate(">=",2001,23,1)	
3	ACTIVE	1999	1	1	\$obj->parsedDate(">=",1999,1,1)	
4	ACTIVE	1995	11	1	\$obj->parsedDate(">=",1995,11,1)	
5	ACTIVE	2000	5	2	\$obj->parsedDate(">=",2000,5,2)	
6	ACTIVE	1997	2	1	\$obj->parsedDate(">=",1997,2,1)	
7	ACTIVE	1997	44	1	\$obj->parsedDate(">=",1997,44,1)	
8						

You now have a syntactically correct threshold. However, the cells in this column still consist of a formula only, not a text value.

- Select the column with the threshold values (click the letter at the top). Press <CTRL> + C to paste the material into the buffer.
- Select the next column over (click the letter at the top—in our example, column H).
- From the **Edit** menu, select **Paste Special > Values**.

H2		= \$obj->parsedDate(">=",2001,23,1)				
	D	E	F	G		H
1						
2	2001	23	1	\$obj->parsedDate(">=",2001,23,1)	\$obj->parsedDate(">=",2001,23,1)	
3	1999	1	1	\$obj->parsedDate(">=",1999,1,1)	\$obj->parsedDate(">=",1999,1,1)	
4	1995	11	1	\$obj->parsedDate(">=",1995,11,1)	\$obj->parsedDate(">=",1995,11,1)	
5	2000	5	2	\$obj->parsedDate(">=",2000,5,2)	\$obj->parsedDate(">=",2000,5,2)	
6	1997	2	1	\$obj->parsedDate(">=",1997,2,1)	\$obj->parsedDate(">=",1997,2,1)	
7	1997	44	1	\$obj->parsedDate(">=",1997,44,1)	\$obj->parsedDate(">=",1997,44,1)	
8						

- Delete all the workspace columns containing information you no longer need.
- Remove extra data to produce the following: columns A (ISSN), B (ACTIVE), and C (LOCAL THRESHOLD).



	A	B	C
1	0949-5932	ACTIVE	\$obj->parsedDate(">=" ,2001,23,1)
2	0733-5210	ACTIVE	\$obj->parsedDate(">=" ,1999,1,1)
3	1473-0197	ACTIVE	\$obj->parsedDate(">=" ,1995,11,1)
4	0971-3328	ACTIVE	\$obj->parsedDate(">=" ,2000,5,2)
5	0891-5946	ACTIVE	\$obj->parsedDate(">=" ,1997,2,1)
6	0733-3196	ACTIVE	\$obj->parsedDate(">=" ,1997,44,1)
7			
8			

## Export Tool

This section includes the following:

- [Export Tool Overview](#) on page 193
- [Basic Export Queries](#) on page 195
- [Advanced Export Queries](#) on page 202
- [Advanced Export Profiles](#) on page 238

### Export Tool Overview

The Export tool is used to export information from the SFX database. To start the Export tool, click **Export Tool** from the KBTools section of the Data Management area. The following window opens:

**Welcome to Export Tool**

**Basic Export Queries** Advanced Export Queries Advanced Export Profiles

**Submit**

**Query Selection**

Export **Active** object\_portfolios Current field selection:  Default  Custom  
from All target services

Export **Active** object\_portfolios Current field selection:  Default  Custom  
from All target services  
which contain local thresholds.

Export **Active** locally created object\_portfolios Current field selection:  Default  Custom  
from All target services

Export **Active** **Link Targets** **TARGETS**

Export **All** targets available for CDI discovery/search activation

Count the number of active object\_portfolios per target\_service  
where both the target\_service and the target are active.

Export URLs from active targets/target\_services (and active object\_portfolios they may contain).

Export objects with local attributes.

Export objects with local Titles.

Export local objects.

**Chinese Titles Export include the following (if exists):**

Simplified Chinese Title  
 Traditional Chinese Title  
 Both Simplified and Traditional Chinese Titles

**Submit**

Figure 86: Export Tool

The following formats can be exported:

- Tab-delimited TXT
- MARC XML
- PubMed LinkOut XML
- HTML
- KBART
- Aleph sequential
- Google Scholar

The Export tool can be used to provide end users with information about your electronic journal collection. It can also be used for internal purposes to gain specific information about resources configured in the SFX KnowledgeBase.

This section includes the following:

- **Basic Export Queries** on page 195
- **Advanced Export Queries** on page 202
- **Advanced Export Profiles** on page 238

## Basic Export Queries

To perform basic export queries, click the **Basic Export Queries** tab (see **Figure 86** on page 194). This section contains a number of predefined SQL scripts that can be used to retrieve information from the SFX database in a tab-delimited `.txt` format.

To perform a basic export query, select one of the following predefined export scripts:

- Export object portfolio entries from specific target services:

---

### NOTE:

It is not possible to export the complete KnowledgeBase by selecting **All** portfolios from **All** target services. You can only export **Active** portfolios from **All** target services.

---

- Export object portfolio entries from specific target services that contain local thresholds:
- Export locally created object portfolio entries from specific target services.

For each of the above export scripts, the following options are available:

- From the drop-down list, select **All**, **Active**, or **Inactive**.
- Select the target from which you want to export the data.
- For **Current field selection**, select one of the following:
  - **Default** – to have the default fields exported (all except `INTERNAL_DESCRIPTION`)
  - **Custom** – a dialog box appears.:

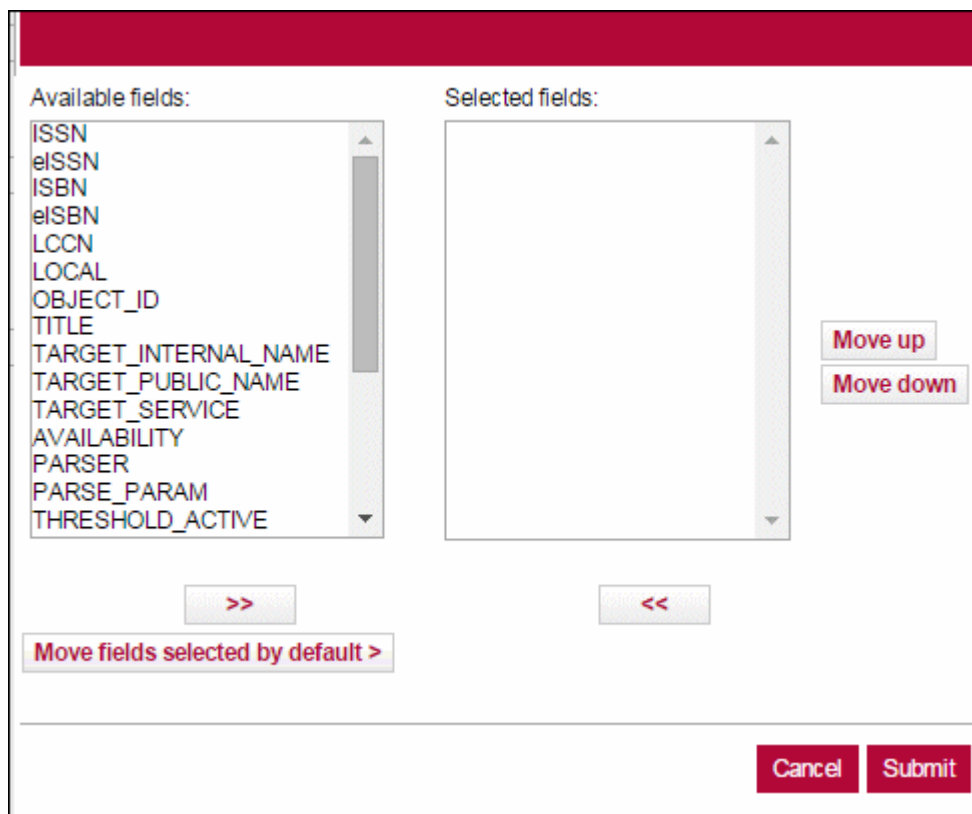


Figure 87: Custom Field Selection

Select the fields you want to export in the left pane and click the right arrow to move them to the right pane. Click the **Move Up** and **Move Down** buttons to arrange the order of the fields and click **Save**.

Click **Move fields selected by default** to move all of the fields selected by default (all except INTERNAL\_DESCRIPTION) to the right pane.

If you select **Default** for the above scripts, the following fields are exported:

- ISSN
- eISSN
- ISBN
- eISBN
- LCCN
- LOCAL
- OBJECT\_ID
- TITLE
- TARGET\_INTERNAL\_NAME

- TARGET\_PUBLIC\_NAME
- TARGET\_SERVICE
- AVAILABILITY
- PARSER
- PARSE\_PARAM
- THRESHOLD\_ACTIVE
- THRESHOLD\_GLOBAL
- CATEGORIES
- PUBLISHER
- NOTE
- AUTHENTICATION
- LANGUAGE
- TITLE\_MAIN
- INSTITUTE (contains the relevant institute name. If empty, the row is relevant for the DEFAULT instance)
- LOCAL\_THRESHOLD (if empty, the active threshold for the row is the GLOBAL threshold)
- TARGET\_INTERNAL\_DESC
- Export SOURCES/TARGETS:
  - From the drop-down list, select **All**, **Active**, or **Inactive**.
  - From the drop-down list, select **Link targets**, **Link and search targets**, or **Search targets**
  - From the drop-down list, select **SOURCES** or **TARGETS**.

For this query, the following fields are exported:

- Target Name
- Target Services
- Note
- Authentication
- Proxy (Possible values: Y/N)
- Free (Possible values: Y/N)
- Local (Possible values: Y/N)
- CDI Search Activation Status (Possible values: Active / Inactive)
- CDI Search Rights (Possible values: Free / Subscription)

- CDI Fulltext rights (Possible values: OpenAccess / Subscription (Title Level) / Subscription (Target))
- CDI Linking (Possible values: be Linkresolver / Link in record)
- Export – ALL targets available for CDI discovery/search activation
  - ACTIVE for Discovery/Search
  - ACTIVE for full text
  - ACTIVE for either full text or Discovery/Search

For this query, the following fields are exported:

- Target Name
- Target Services
- Note
- Authentication
- Proxy (Possible values: Y/N)
- Free (Possible values: Y/N)
- Local (Possible values: Y/N)
- CDI Target Type (Possible values: Abstracting & Indexing database or Full Text Collection)
- Full text Activation status (Possible values: Active / Inactive)
- CDI Search Activation Status (Possible values: Active / Inactive)
- CDI Search Rights (Possible values: Free / Subscription)
- CDI Fulltext Rights (Possible values: OpenAccess / Subscription (Title Level) / Subscription (Target))
- CDI Linking (Possible values: Linkresolver / Link in record)
- Contains Newspapers in CDI (Possible values: No / Yes / Yes, Newspapers Search only)
- CDI Number of records (The number of records currently indexed in CDI)
- CDI Resource Types (Lists up to 5 of the most frequently index resource types for the target)
- CDI Update frequency (Possible values: Weekly / Monthly / Quarterly / Yearly)
- CDI DB ID (CDI identifier)
- CDI Last Market update (Last update date for this target in CDI)

- Count the number of active portfolios per target service in which both the target service and target are active.

For this query, the following fields are exported:

- Target Name
  - Target Service
  - Count
- Export URLs from active targets/target services (and active object portfolios they may contain).

For this query, the following fields are exported:

- Target Service
- URL

The following configuration file lists the keys that determine what information is treated as a URL to be exported from the `PARSE_PARAM` fields of the target service and object portfolio tables:

- `/exlibris/sfx_ver/sfx_version_3/<local_instance>/config/parse_param_url_keys.config`
- `/exlibris/sfx_ver/sfx4_1/<local_instance>/config/parse_param_url_keys.config`

The following three types of `parse_param` keys exist:

- Parse param keys of type URL. (These are listed in the file and are exported.)
- Parse param keys that can be either URL or not (for example – `jkey`). For these, SFX checks if the value starts with `http` to determine if the value is a URL or not.
- Parse param keys of type not URL. (These are not listed in the file and are not exported.)

---

**NOTE:**

When creating local target services or portfolios that include URL information in the `parse_param` field to be exported in the export query, make sure to use a key listed in the configuration file, or add the key to the configuration file.

---

- Export objects with local attributes.

For this query, the following fields are exported:

- ISSN
- eISSN
- ISBN

- eISBN
- LCCN
- OBJECT\_ID
- LOCAL\_ATTRIBUTE
- LOCAL\_TITLE
- LANGUAGE
- TITLE\_MAIN
- Export objects with local titles.  
For this query, the following fields are exported:
  - ISSN
  - eISSN
  - ISBN
  - eISBN
  - LCCN
  - OBJECT\_ID
  - LOCAL\_TITLE
- Export local objects.  
For this query, the following fields are exported:
  - OBJECT\_ID
  - ISSN
  - eISSN
  - ISBN
  - eISBN
  - TITLE
  - CATEGORIES
  - PUBLISHER
  - LOCAL\_ATTRIBUTE
  - LANGUAGE
  - TITLE\_MAIN

---

**NOTE:**

The following hierarchy is used for including ISBN information from



hardback and paperback books in the ISBN, eISBN, and Additional ISBNs/eISBN fields:

1Sub-type PRINT\_HBK, where identifiers with the highest object\_identifier\_id come first.

2Sub-type PRINT\_PBK, where identifiers with the highest object\_identifier\_id come first.

3Sub-type ELECTRONIC, where identifiers with the highest object\_identifier\_id come first.

If institutes have been defined, it is possible to filter the export query results by institutes or groups. (For more information about institutes, refer to the **Institute Feature** section of the *SFX Advanced User's Guide*.) Select an institute from the **Restrict to the following institutes/groups (optional)** text box. If you do not select an institute from this text box, the basic export includes all objects that have at least one active portfolio (if the target and target service are also active) from DEFAULT and all institutes and groups.

If you select only one institute, institute inheritance is used. Everything either active for the institute or active for the group (and not inactive for the institute), or active for DEFAULT (and not inactive for institute or group) is included.

If you select more than one value from the institute box (for example, an institute and DEFAULT), a boolean OR is assumed between the selections. As a result, anything either active for the institute or DEFAULT is included in the export file. If an export is created for more than one institute/group, the export file contains one row for each institute/group for which a particular activation is relevant.

If Chinese titles are included in the export, select **Simplified Chinese Title**, **Traditional Chinese Title**, or **Both Simplified and Traditional Chinese Titles** to include the type of Chinese titles you want in the title field:



The image shows a dialog box titled "Chinese Titles Export include the following (if exists):". It contains three radio button options: "Simplified Chinese Title" (which is selected), "Traditional Chinese Title", and "Both Simplified and Traditional Chinese Titles".

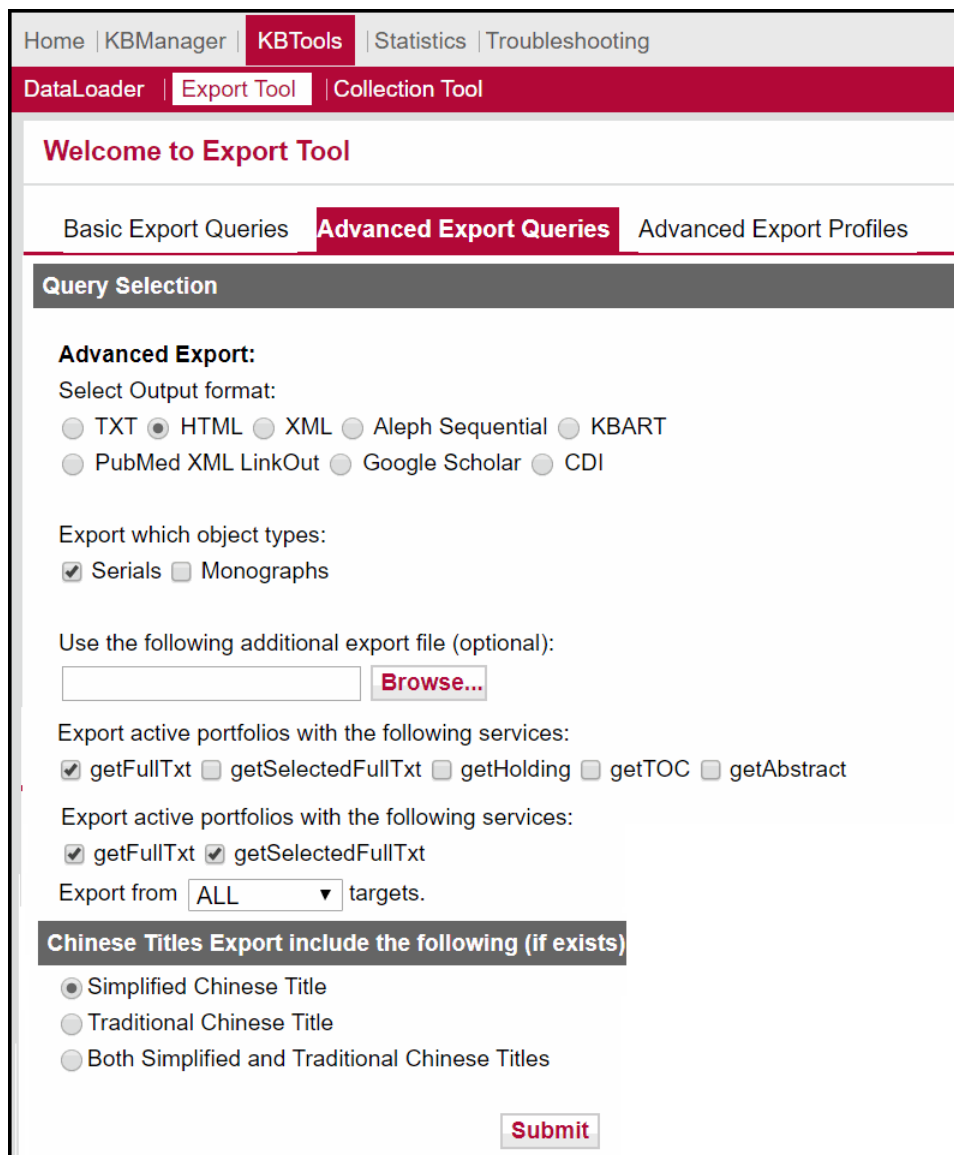
Figure 88: Chinese Titles Export

If both are exported, the format is:

```
<Simplified chinese>/#/<Traditional chinese>
```

## Advanced Export Queries

Advanced export queries can be run either manually or by using predefined export profiles. To perform an advanced export query, click the **Advanced Export Queries** tab. The following window opens:



The screenshot shows a web interface for the 'Export Tool'. At the top, there is a navigation bar with links for 'Home', 'KBManager', 'KBTools' (highlighted), 'Statistics', and 'Troubleshooting'. Below this is a secondary navigation bar with 'DataLoader', 'Export Tool' (highlighted), and 'Collection Tool'. The main content area has a heading 'Welcome to Export Tool' and three tabs: 'Basic Export Queries', 'Advanced Export Queries' (highlighted), and 'Advanced Export Profiles'. Under the 'Advanced Export Queries' tab, there is a 'Query Selection' section. This section includes: 'Advanced Export:' with 'Select Output format:' and radio buttons for 'TXT', 'HTML' (selected), 'XML', 'Aleph Sequential', 'KBART', 'PubMed XML LinkOut', 'Google Scholar', and 'CDI'; 'Export which object types:' with checkboxes for 'Serials' (checked) and 'Monographs'; 'Use the following additional export file (optional):' with a text input field and a 'Browse...' button; 'Export active portfolios with the following services:' with checkboxes for 'getFullTxt' (checked), 'getSelectedFullTxt', 'getHolding', 'getTOC', and 'getAbstract'; 'Export active portfolios with the following services:' with checkboxes for 'getFullTxt' (checked) and 'getSelectedFullTxt' (checked); 'Export from' a dropdown menu set to 'ALL' and the text 'targets.'; and a section titled 'Chinese Titles Export include the following (if exists)' with radio buttons for 'Simplified Chinese Title' (selected), 'Traditional Chinese Title', and 'Both Simplified and Traditional Chinese Titles'. At the bottom right of the form is a 'Submit' button.

Figure 89: Advanced Export Queries

For information on using predefined export profiles, see [Advanced Export Profiles](#) on page 238.

This section describes how to use SQL scripts to retrieve information about active full text journals from the SFX database. This section includes:

- **Manual Export** on page 203
- **Text Tab-Delimited File Format** on page 206
- **HTML File Format** on page 208
- **MARC XML File Format** on page 210
- **Aleph Sequential Format** on page 223
- **KBART Format** on page 226
- **PubMed XML LinkOut Format** on page 229
- **Google Scholar Format** on page 231
- **CDI Format** on page 236
- **Export File Naming Conventions** on page 237

### **Manual Export**

The following section describes how to perform a manual advanced export query.

#### **To perform a manual advanced export query:**

- 1 Select one of the following output formats:
  - Tab-delimited TXT
  - HTML
  - XML
  - ALEPH Sequential
  - KBART
  - PubMed XML LinkOut
  - Google Scholar
  - CDI
- 2 Choose to include serials (for example, journals) and/or monographs (for example, books) in the export file.

When choosing to export serials, objects with the following object types are exported:

- JOURNAL
- SERIES
- CONFERENCE

- NEWSPAPER
- TRANSCRIPT
- WIRE

When choosing to export monographs, objects with the following object types are exported:

- PROCEEDING
- BOOK
- DISSERTATION
- DOCUMENT
- MANUSCRIPT
- REPORT
- CD
- DATABASE
- VIDEO
- AUDIO
- SCORE

### 3 Specify institute information (optional).

If institutes have been defined, it is possible to filter the export query results by institutes or groups. (For more information about institutes, refer to the **Institute Feature** section of the *SFX Advanced User's Guide*.) Select an institute from the **Restrict to the following institutes/groups (optional)** text box.

Select **Default** to export only books/journals active for DEFAULT. Institute specific activations are not included.

Select one institute to export all books/journals active for that institute, active for the group to which the institute is affiliated, or active for DEFAULT. (Note that group or default activations are not included if an item is explicitly set to inactive for the institute).

Select one group to export all books/journals active for that group or active for DEFAULT (and not explicitly set to be inactive for the group). Note that when selecting a group, objects active for institutes affiliated with the group are not included in the export file.

When more than one institute (or institutes and groups) are selected, a file is generated that contains anything either active for the institutes selected, active for the group, or active for DEFAULT. Note that when the output is in CDI format, it is not possible to select multiple institutes or groups.

If you do not select an institute, the export includes all items active for at least one institute, group, or DEFAULT.

---

**NOTE:**

The export file contains coverage specific for the institute. If no institute or group date thresholds have been specified, the default local or global threshold is used for the coverage statement.

---

The following hierarchy is used:

- Institute specific date coverage
  - If there is no institute specific date coverage, group specific date coverage is used (but only if the activation is also for the group).
  - If there is no group specific date coverage, then the default date coverage is used. (The local threshold is used if it exists, if not, the global threshold is used.)
- 4 In the **Use the following additional export file (optional)** field, specify an additional `.txt` file to be used when generating the export file in a form other than `.txt`.
  - 5 In the **Export active portfolios with the following services** field, select the type of service you want to export. It is possible to select more than one service type.
  - 6 From the **Export from** drop-down list, select either **ALL** or **SPECIFIC** and select the targets you want to include in the export.

Depending on what output file format you chose in step 1, different options are now displayed.

- For `.txt`, see **Text Tab-Delimited File Format** on page 206
- For HTML, see **HTML File Format** on page 208
- For XML, see **MARC XML File Format** on page 210
- For Aleph Sequential, see **Aleph Sequential Format** on page 223
- For KBART, see **KBART Format** on page 226
- For PubMed XML LinkOut, see **PubMed XML LinkOut Format** on page 229
- For Google Scholar, see **Google Scholar Format** on page 231
- For CDI, see **CDI Format** on page 236

### **Text Tab-Delimited File Format**

To produce an export file in `.txt` format, first follow the steps in [Manual Export](#) on page 203 and then continue with the following steps:

- 1 If Chinese titles are included in the export, select **Simplified Chinese Title**, **Traditional Chinese Title**, or **Both Simplified and Traditional Chinese Titles** to include the type of Chinese titles you want in the title field.
- 2 Click **Submit**.

The `.txt` format is intended mainly to create export files that can be used to create additional export files containing data from multiple instances.

The following data is included in the `.txt` file:

- Column 1 – Sortable Title (used internally in SFX for sorting purposes)
- Column 2 – Title
- Column 3 – Title Non-Filing Character
- Column 4 – ISSN
- Column 5 – Object ID
- Column 6 – Target Public Name
- Column 7 – Threshold (not in Perl statement, but in textual format)
- Column 8 – eISSN
- Column 9 – Abbreviated Title
- Column 10 – Target Service Type
- Column 11 – LCCN
- Column 12 – Object Portfolio ID
- Column 13 – 856-u – This field will be empty
- Column 14 – 856-y – This field will be empty<sup>142</sup>
- Column 15 – 856-a – This field will be empty
- Column 16 – 245\_h – This field will be empty
- Column 17 – Local Threshold
- Column 18 – Global Threshold
- Column 19 – Target ID
- Column 20 – Target Service ID
- Column 21 – Object Portfolio\_ID
- Column 22 – Categories
- Column 23 – Local Attribute
- Column 24 – ISBN

- Column 25 – eISBN
- Column 26 – Publisher
- Column 27 – Place of Publication
- Column 28 – Date of Publication
- Column 29 – Object Type
- Column 30 – Activation status for the DEFAULT institute
- Column 31 – Institute ID (if available)
- Column 32 – Institute Name (if available)
- Column 33 – Institute Availability (if available)

---

**NOTE:**

If multiple INSTITUTE entries exist for a specific journal, there are multiple entries in the `.txt` file—one for each institute.

---

- Column 34 – Language (in three-letter code)
  - Column 35 – Main Title – important only for the sorting of CJK titles
  - Column 36 – Full Original Title – for CJK titles only
  - Column 37 – Additional ISBNs
  - Column 38 – Additional eISBNs
  - Column 39 – Author
  - Column 40 – Owner
  - Column 41 – THRESHOLD\_LOCAL (if empty, the active threshold for the row is the GLOBAL threshold)
  - Column 42 – PARSE\_PARAM used for this portfolio
  - Column 43 – IS\_FREE - values can be 1 (portfolio is freely accessible) or 0 (access to the portfolio is restricted)
- 3 To include author information in the SFX database, select the **Include author information** check box.
  - 4 To include note and authentication information in the SFX database, select the **Include note and authentication information** check box. (Only object portfolio information is included, not target or target service.)
  - 5 To include internal note information in the SFX database, select the **Include Internal note information** check box. (Only object portfolio information is included, not target or target service.)

If Chinese titles are included in the export, it is possible to select whether Simplified or Traditional Chinese (or both) are included in the title field. If both are exported, the format is:

```
<Simplified chinese>/#/<Traditional chinese>
```

### HTML File Format

To produce an export file in HTML format, first follow the steps in [Manual Export](#) on page 203 and then continue with the following steps:

- 1 If Chinese titles are included in the export, select **Simplified Chinese Title**, **Traditional Chinese Title**, or **Both Simplified and Traditional Chinese Titles** to include the type of Chinese titles you want in the title field.
- 2 Click **Submit**.

SFX generates a static HTML list, identifies active full-text object portfolios with active targets and target services, and reformats this data into HTML pages that list items by journal name—one page for each letter of the alphabet. The HTML pages include the following information:

- Journal title
- ISSN
- Public target name
- Appropriate thresholds (dates that the journal is available)

For each journal, two links are provided:

- A direct link to the Web page of the electronic journal when clicking the journal title
- A link to the SFX menu by clicking the SFX button of a particular journal

The redirection option is configured with the Menu Configuration tool located under the Configuration section of Setup & Administration. For more information on redirection, see [DirectLink](#) on page 452.

After selecting HTML for the output format, a script called `E-journals` runs at the UNIX level on the SFX server. After this script runs, the following opens:

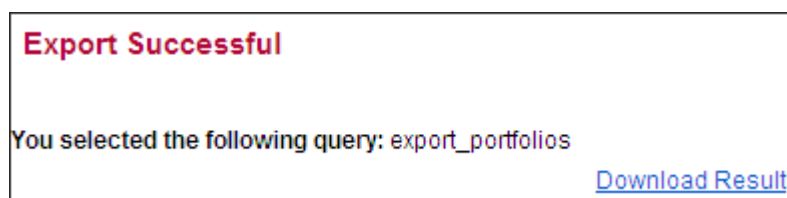


Figure 90: Export Successful



To display a window with the first HTML file generated by the e-journal script, click **Download Result**.



Figure 91: HTML Output

The generated HTML lists are located in the following directory:

```
exlibris/sfx_ver/sfx4_1/<instance name>/templates/e-  
collection-html/results
```

The following is an example of an HTML list:

```
e-journals-A.html e-journals-G.html e-journals-M.html e-journals-  
S.html  
e-journals-B.html e-journals-H.html e-journals-N.html e-journals-  
T.html  
e-journals-C.html e-journals-I.html e-journals-O.html e-journals-  
U.html  
e-journals-D.html e-journals-J.html e-journals-P.html e-journals-  
V.html  
e-journals-E.html e-journals-K.html e-journals-Q.html e-journals-  
W.html  
e-journals-F.html e-journals-L.html e-journals-R.html
```

Each time the script is run, SFX replaces the HTML files with the new files that are created. There is no need to empty this directory each time the script is run.

The following is the URL of these HTML pages:

```
http://<sfx_server:port>/<sfx_instance>/e_collection/e-  
journals-A.html
```

If you want to have the e-journal lists hosted on a different Web server, replace the base URL of each link with a hard-coded base URL.

The HTML template that is used to generate these HTML lists can be found in the following location:

```
exlibris/sfx_ver/sfx4_1/<instance_name>/templates/e-  
collection-html/listing.tmpl
```

This HTML template can be customized according to an institution's preferences.

Some features, such as CJK support and the exporting of institute-specific threshold information, are not supported in the HTML export format. Instead, it is recommended that you use the A-Z list, which can be searched and browsed. For more information, see **Configuration** on page 317 and the **A-Z List** section of the *SFX Advanced User's Guide*.

### **MARC XML File Format**

To produce an export file in XML format, first follow the steps in **Manual Export** on page 203 and then continue with the following steps:

- 1 Select **Fresh export** or **Compare export from previous file**. If you select **Compare export**, select a previous export file to compare against.
  - **Fresh export** – This option exports all active getFullTxt, getHolding, getAbstract, and getTOC portfolios for all active targets or a selection of active targets.
  - **Compare with previous export** – This option exports and compares the export file with a previously created export file. In the header of each record, information is available to indicate whether the record has changed, has not changed, has been deleted, or has been added between the time the previous export was created and the new export was completed.

If you select **Compare with previous export** you have the option to select **Exclude objects that were not changed**. This excludes records that were not changed from the export file, but includes records that are new, deleted, or changed.

The top part of the export file contains information about the type of export and the name of the SFX instance from which information was exported.

The following is an example of a fresh export:

```
<!-- FIRST INCREMENTAL -->  
<!-- INSTANCE:sfx_local -->
```

The following is an example of a compare export:

```
<!-- INCREMENTAL -->
<!-- INSTANCE:sfx_local -->
```

The first time you create an export file, the drop-down list that lists the previous files is empty, and all items in the XML file are marked as new. The second time you export, the previous file is listed in the drop-down list. If you choose **Compare with previous export** and select the previous file, the new export file contains information about changed, not changed, added, and deleted items. The leader of each record contains status information.

Status information can be found in the sixth character after the leader. For example:

- For new records (or if this is the first export created in this format):

```
<leader>-----nas-a22-----z--4500</leader>
```

- For records deactivated or deleted in the SFX database between the previous export and the current export:

```
<leader>-----das-a22-----z--4500</leader>
```

---

**NOTE:**

This is an important difference between the Fresh and the Compare exports. With Compare exports, the items deleted between the current and previous export are included in the export file.

- If a change was made between the previous export and the current export (for example, a change to coverage information):

```
<leader>-----cas-a22-----z--4500</leader>
```

- If no change was made between the previous export and the current export:

```
<leader>-----as-a22-----z--4500</leader>
```

The previous export files used during the comparison are stored in the following directory:

```
exlibris/sfx_ver/sfx4_1/<sfx_instance>/dbs/scratch/
e_collection_update
```

- (Optional) In the **Specify export file prefix** field, specify a prefix to be added to the export file. This is an optional feature that makes it easier to find the export file later.  
  
A prefix can also be used to distinguish partial exports (for example, using only selective targets) from a complete export.
- In the **Specify base URL (856 \$u)** field, specify the base URL of your instance.
- In the **link text (856\$y)** field, specify the link text information to be included for each record in the XML file. Each record of the resulting export file contains an OpenURL and a link text in the 856 field.

For example:

```
<datafield tag="856" ind1="" ind2="">
  <subfield code="u">http://demo.exlibrisgroup.com:3210/
demo?url_ver=Z39.88-2004&ctx_ver=Z39.88-
2004&ctx_enc=info:ofi/enc:UTF-8&rft_id=info:sid/
sfxit.com:opac_856&url_ctx_fmt=info:ofi/
fmt:kev:mtx:ctx&sfx.ignore_date_threshold=1&rft.object_id=954
925218001&svc_val_fmt=info:ofi/
fmt:kev:mtx:sch_svc&svc.fulltext=yes</subfield>
  <subfield code="y">SFX linking</subfield>
</datafield>
```

- In the **Specify institution info (852 \$a)** field, specify institution information to be included in the 852 MARC tag for each of the records in the export (for example, to make it easier to merge different XML).

For example:

```
<datafield tag="852" ind1="" ind2="">
  <subfield code="a">Science Campus</subfield>
</datafield>
```

- In the **Title note information (245 \$h)** field, specify text to be included in the 245 MARC field (subfield h) of each record in the export file. The text is identical for all records.

For example:

```
<datafield tag="245" ind1="" ind2="">
  <subfield code="a">Conformal geometry and dynamics </
subfield>
  <subfield code="h">[electronic content available] </
subfield>
</datafield>
```

- 7 To add categories in the <650> MARC field (optional), select the **Add categories to the export file** check box.

Category information is exported according to the Active mode in the Category Setup tool. Depending on the setup, SFX exports Ex Libris categories, translated categories, or local categories and corresponding assignments.

For example:

```
<datafield tag="650" ind1="" ind2="4">
  <subfield code="a">Arts and Humanities</subfield>
  <subfield code="x">Education & Careers</subfield>
</datafield>
<datafield tag="650" ind1="" ind2="4">
  <subfield code="a">Arts and Humanities</subfield>
  <subfield code="x">Performing Arts, Travel and Leisure</subfield>
</datafield>
```

- 8 To add LOCAL attributes in the <901> MARC field (subfield \$1), select the **Add local attributes to the export file** check box.
- 9 To include a serviceType restriction in the OpenURL, select the **Include service type restriction in 856 URL** check box. By default, a service type restriction is included that limits the SFX services in the resulting SFX menu to only those with service types included. To remove this element from the OpenURL, clear the check box.

For example:

```
<datafield tag="856" ind1="" ind2="">
  <subfield code="u">http://demo.exlibrisgroup.com:3210/
demo?url_ver=Z39.88-2004&ctx_ver=Z39.88-
2004&ctx_enc=info:ofi/enc:UTF-8&rft_id=info:sid/
sfxit.com:opac_856&url_ctx_fmt=info:ofi/
fmt:kev:mtx:ctx&sfx.ignore_date_threshold=1&rft.object_id=954
925218001</subfield>
  <subfield code="y">SFX linking</subfield>
</datafield>
```

For more information on serviceType restrictions in the OpenURL, see **ServiceType Feature** on page 418.

- 10 To include information about all relevant institute settings in the SFX database, select the **Include institute information** check box.  
To create a Verde localization file, select this check box.
- 11 To include author information in the SFX database, select the **Include author information** check box.

- 12 To include note and authentication information in the SFX database, select the **Include note and authentication information** check box. (Only object portfolio information is included, not target or target service.)
- 13 To include internal note information in the SFX database, select the **Include Internal note information** check box. (Only object portfolio information is included, not target or target service.)
- 14 To include additional title information in the XML file, select **Include alternative titles**.
- 15 If Chinese titles are included in the export, select **Simplified Chinese Title**, **Traditional Chinese Title**, or **Both Simplified and Traditional Chinese Titles** to include the type of Chinese titles you want in the title field.
- 16 Click **Submit**.

The Export tool identifies active `getFullTxt`, `getSelectedFullTxt`, `getAbstract`, `getHolding`, and `getTOC` object portfolios with active targets and target services and reformats the data into XML.

The XML file includes the following information:

- Journal title
- Abbreviated titles
- ISSN
- LCCN
- Public target name
- Thresholds

The following are optional:

- Title note
- 856 MARC fields with OpenURL information and an institution indication (can be used when merging different XML files)
- Categories
- Local

Also, it is possible to include more information about which institutes have access to each of the journals in the export file.

The XML tags used by the export program refer to standard MARC tags.

The following tags are used:

- 010 subfield a: LCCN number
- 008: date in YYMMDD format and language code in ISO 639-2 standard format

The format of the field is: YYMMDDuuuuuuuuuxx-uu- | -----u | ---- | LNG-d

- 020: ISBNs and eISBNs. This is a repeatable field for when the object has more than one print or electronic ISBN/eISBN.
- 022 subfield a: ISSN
- 030 subfield a: CODEN
- 090 subfield a: OBJECT number of the journal in the SFX database
- 100 subfield a: Main Author (personal name)
- 110 subfield a: Main Author (corporate name)
- 111 subfield a: Main Author (meeting name)
- 210 subfield a: abbreviated title information
- 245 subfield a: journal title
- 245 subfield h: journal title
- 246 subfield a – Alternative title

---

**NOTE:**

This is the same for all records. It can be added in the Export tool interface.

---

- 260 Imprint
  - subfield a - Place of publication
  - subfield b - Name of publisher
  - subfield c - Date of publication
- 650 Category information (This field is included only if the option to include categories is selected.)
  - subfield a - category
  - subfield x - subcategory
- 700 subfield a: Additional Author (personal name)
- 710 subfield a: Additional Author (corporate name)
- 711 subfield a: Additional Author (meeting name)
- 776 subfield x: eISSN
- 852 subfield a: institution indication. It is the same for all records. It can be added in the Export tool interface.
- 856 subfield u and y: OpenURL and link text
- 866 subfield a: activation status information
- 866 subfield b: threshold information in perl statement format

This subfield is included only in case of:

  - local thresholds

- global thresholds for local OPs
- 866 subfield c: describes type of threshold included in 866 b. Possible values are:
  - I – institute
  - G – global
  - L – Local
- 866 subfield i: INSTITUTE for which this 866 record applies
- 866 subfield j: List of INSTITUTE exceptions if subfield i is the DEFAULT INSTITUTE
- 866 subfield s: target service Internal ID
- 866 subfield t: target Internal ID
- 866 subfield x: target name and service
- 866 subfield z: object portfolio Internal ID

---

**NOTE:**

866 subfields b, s, t, and z are not intended for end users but may facilitate the integration of SFX data with external systems—for example, ejournal databases.)

---

- 901 subfield a: information stored in the LOCAL field of the objects
- 945 field: this field is exported only for CJK language objects
  - Subfield c: original language title (is included only for Chinese objects) contains Simplified Chinese title
  - Subfield m: main title
  - Subfield s: normalized title used for sorting purposes. The normalized title differs according to the country setting. The country value is set in the searchable A-Z version 3 configuration for the default profile.
    - **Chinese titles** – In China, this subfield contains the title in Pinyin. In Taiwan, this subfield contains the title's stroke sequence number.
    - **Korean titles** – This subfield contains the title in Hangul.
    - **Japanese titles** – This subfield contains the title in Katakana or Hiragana.
  - Subfield t: original language title (relevant for Chinese objects) that contains Traditional Chinese titles.



The following is an example of a MARC XML output:

```
<record>
  <leader>-----nas-a22-----z--4500</leader>
  <controlfield tag="008">080911uuuuuuuuuuxx-uu-|-----u|----
|eng-d</controlfield>
  <datafield tag="010" ind1="" ind2="">
    <subfield code="a">11007619</subfield>
  </datafield>
  <datafield tag="245" ind1="" ind2="4">
    <subfield code="a">The American economic review</subfield>
  </datafield>
  <datafield tag="210" ind1="" ind2="">
    <subfield code="a">AM ECON REV</subfield>
  </datafield>
  <datafield tag="210" ind1="" ind2="">
    <subfield code="a">AMERICAN ECONOMIC REVIEW</subfield>
  </datafield>
  <datafield tag="260" ind1="" ind2="">
    <subfield code="a">Nashville, Tenn. [etc.]</subfield>
    <subfield code="b">American Economic Association.</subfield>
  </datafield>
  <datafield tag="022" ind1="" ind2="">
    <subfield code="a">0002-8282</subfield>
  </datafield>
  <datafield tag="090" ind1="" ind2="">
    <subfield code="a">954921334029</subfield>
  </datafield>
  <datafield tag="856" ind1="" ind2="">
    <subfield code="u">http://demo.exlibrisgroup.com:3210/
demo?url_ver=Z39.88-2004&ctx_ver=Z39.88-
2004&ctx_enc=info:ofi/enc:UTF-8&rfr_id=info:sid/
```

```
sfxit.com:opac_856&url_ctx_fmt=info:ofi/  
fmt:kev:mtx:ctx&sfx.ignore_date_threshold=1&rft.object_id=954  
921334029&svc_val_fmt=info:ofi/  
fmt:kev:mtx:sch_svc&svc.fulltext=yes&</subfield>  
</datafield>  
<datafield tag="866" ind1="" ind2="">  
  <subfield code="a">Available from 1911 volume: 12 issue:  
3.</subfield>  
  <subfield code="b">$obj->parsedDate(">=",1911,12,3)</  
subfield>  
  <subfield code="s">110994096325001</subfield>  
  <subfield code="t">110994096325000</subfield>  
  <subfield code="x">JSTOR Arts and Sciences 1:Full Text</  
subfield>  
  <subfield code="z">110994097836161</subfield>  
</datafield>  
<datafield tag="650" ind1="" ind2="4">  
  <subfield code="a">Business, Economy and Management</  
subfield>  
  <subfield code="x">Economics</subfield>  
</datafield>  
<datafield tag="650" ind1="" ind2="4">  
  <subfield code="a">Business, Economy and Management</  
subfield>  
  <subfield code="x">Finance</subfield>  
</datafield>  
<datafield tag="650" ind1="" ind2="4">  
  <subfield code="a">Business, Economy and Management</  
subfield>  
  <subfield code="x">General and Others</subfield>  
</datafield>  
<datafield tag="901" ind1="" ind2="">  
<subfield code="a">ZDB00123778</subfield>  
</datafield>  
</record>
```

The name and location of the XML output file is:

```
exlibris/sfx_ver/sfx4_1/<sfx instance>/dbs/scratch/e-  
collection.MMDDYYYYHHMMSS.xml-marc
```

For example:

```
exlibris/sfx_ver/sfx4_1sfx_local/dbs/scratch/  
e-collection.10312003092008.xml-marc
```

The following two fields are added to the 866 field of each record in the MARC XML export:

Table 23. 866 Subfields

866 Subfield	Description
866 subfield i	INSTITUTE information
866 subfield j	List of INSTITUTE exceptions if subfield i is the DEFAULT INSTITUTE

(For more information about institutes, refer to the **Institute Feature** section of the *SFX Advanced User's Guide*.)

For each institute and each serviceType, a new 866 is included.

For example:

```
<record>
<leader>    nas a22      z  4500</leader>
<controlfield tag="008">eng</controlfield>
<datafield tag="022" ind1="" ind2="">
  <subfield code="a">0002 8282</subfield>
</datafield>
<datafield tag="245" ind1="" ind2="4">
  <subfield code="a">The American economic review</subfield>
</datafield>
<datafield tag="210" ind1="" ind2="">
  <subfield code="a">AM ECON REV</subfield>
</datafield>
<datafield tag="210" ind1="" ind2="">
  <subfield code="a">AMERICAN ECONOMIC REVIEW</subfield>
</datafield>
<datafield tag="260" ind1="" ind2="">
  <subfield code="a">Atlanta,</subfield>
  <subfield code="b">AHC Media LLC</subfield>
</datafield>
<datafield tag="090" ind1="" ind2="">
  <subfield code="a">954921334029</subfield>
</datafield>
<datafield tag="866" ind1="" ind2="">
  <subfield code="a">Available from 1911 until 2002.</subfield>
  <subfield code="b">${obj-
>parsedDate('>=', '1911', 'undef', 'undef') && $obj-
>parsedDate('<=', '2002', 'undef', 'undef')</subfield>
```

```
subfield>
  <subfield code="i">InstA</subfield>
  <subfield code="s">110994096325001</subfield>
  <subfield code="t">110994096325000</subfield>
  <subfield code="x">JSTOR Arts and Sciences 1:Full Text</
subfield>
  <subfield code="z">110994097836161</subfield>
</datafield>
<datafield tag="866" ind1="" ind2="">
  <subfield code="a">Available from 1950 until 2002.</
subfield>
  <subfield code="b">$obj-
>parsedDate('>=', '1950', 'undef', 'undef') && $obj-
>parsedDate('<=', '2002', 'undef', 'undef')</subfield>
  <subfield code="i">DEFAULT</subfield>
  <subfield code="j">InstB</subfield>
  <subfield code="s">110994096325001</subfield>
  <subfield code="t">110994096325000</subfield>
  <subfield code="x">JSTOR Arts and Sciences 1:Full Text</
subfield>
  <subfield code="z">110994097836161</subfield>
</datafield>
</record>
```

The following items are included in the XML file:

- Items active for DEFAULT if the activation status of the target, target service, and object portfolio is active and no target institute, target service institute, and object portfolio institute entries exists.

This means that all institutes have access to the journal. The 866 tag includes the DEFAULT institute information in subfield i.

For example:

```
<datafield tag="866" ind1="" ind2="">
  <subfield code="a">Available from 1950 until 2002.</
subfield>
  <subfield code="i">DEFAULT</subfield>
  <subfield code="s">110994096325001</subfield>
  <subfield code="t">110994096325000</subfield>
  <subfield code="x">JSTOR Arts and Sciences 1:Full Text</
subfield>
  <subfield code="z">110994097836161</subfield>
</datafield>
```

- Items active for DEFAULT with institute exceptions if the activation status of the target, target service, and object portfolio is active and inactive target institute, target service institute, or object portfolio institute entries exist.

This means all institutes except the ones listed have access to this journal. The 866 tag includes the DEFAULT institute information in subfield i and lists the inactive institutes in subfield j

```
<datafield tag="866" ind1="" ind2="">
  <subfield code="a">Available from 1911 until 2002.</subfield>
  <subfield code="b">$obj-
>parsedDate('>=', '1911', 'undef', 'undef') && $obj-
>parsedDate('<=', '2002', 'undef', 'undef')</subfield>
  <subfield code="i">DEFAULT</subfield>
  <subfield code="j">InstA, InstB</subfield>
  <subfield code="s">110994096325001</subfield>
  <subfield code="t">110994096325000</subfield>
  <subfield code="x">JSTOR Arts and Sciences 1:Full Text</subfield>
  <subfield code="z">110994097836161</subfield>
</datafield>
```

- Items active for INSTITUTE

If a specific item is available for an institute, the 866 tag includes the institute name in subfield i.

For example:

```
<datafield tag="866" ind1="" ind2="">
  <subfield code="a">Available from 1911 until 2002.</subfield>
  <subfield code="b">$obj-
>parsedDate('>=', '1911', 'undef', 'undef') && $obj-
>parsedDate('<=', '2002', 'undef', 'undef')</subfield>
  <subfield code="i">InstA</subfield>
  <subfield code="s">110994096325001</subfield>
  <subfield code="t">110994096325000</subfield>
  <subfield code="x">JSTOR Arts and Sciences 1:Full Text</subfield>
  <subfield code="z">110994097836161</subfield>
</datafield>
```

When you create an export with more than one institute selected, the same target service is active for more than one institute, and none of the institute-specific activations has an institute-specific threshold statement, only one 866 tag is included per object portfolio (see example 1 below)

If at least one of the institute-specific activations has an institute specific-threshold statement, multiple 866 tags—one for each institute—are included (see example 2 below).

### Example 1:

```
<record>
  <leader>-----nas-a22-----z--4500</leader>
  <controlfield tag="008">090924uuuuuuuuuuxx-uu-|-----u|----|eng-
d</controlfield>
  <datafield tag="245" ind1="" ind2="">
    <subfield code="a">Abacus</subfield>
  </datafield>
  <datafield tag="260" ind1="" ind2="">
    <subfield code="b">Blackwell Publishing Limited</subfield>
  </datafield>
  <datafield tag="022" ind1="" ind2="">
    <subfield code="a">0001-3072</subfield>
  </datafield>
  <datafield tag="090" ind1="" ind2="">
    <subfield code="a">954921333005</subfield>
  </datafield>
  <datafield tag="856" ind1="" ind2="">
    <subfield code="u">http://il-sfx06:3210/mit?url_ver=Z39.88-
2004&amp;ctx_ver=Z39.88-2004&amp;ctx_enc=info:ofi/enc:UTF-
8&amp;rfr_id=info:sid/sfxit.com:opac_856&amp;url_ctx_fmt=info:ofi/
fmt:kev:mtx:ctx&amp;sfx.ignore_date_threshold=1&amp;rft.object_id=9
54921333005&amp;svc_val_fmt=info:ofi/
fmt:kev:mtx:sch_svc&amp;svc.fulltext=yes&amp;</subfield>
    <subfield code="y">SFX</subfield>
  </datafield>
  <datafield tag="866" ind1="" ind2="">
    <subfield code="a">Available from 2000. </subfield>
    <subfield code="i">InstA, InstB</subfield>
    <subfield code="j">InstC</subfield>
    <subfield code="s">110975593244097</subfield>
  <subfield code="t">110975593244095</subfield>
  <subfield code="x">EBSCOhost Business Source Premier:Full Text</
subfield>
    <subfield code="z">110976733153888</subfield>
  </datafield>
</record>
```

Example 2:

```
<record>
  <leader>-----nas-a22-----z--4500</leader>
  <controlfield tag="008">090924uuuuuuuuuuxx-uu-|-----u|----|eng-
d</controlfield>
  <datafield tag="245" ind1="" ind2="">
    <subfield code="a">Abacus</subfield>
  </datafield>
  <datafield tag="260" ind1="" ind2="">
    <subfield code="b">Blackwell Publishing Limited</subfield>
  </datafield>
  <datafield tag="022" ind1="" ind2="">
    <subfield code="a">0001-3072</subfield>
  </datafield>
  <datafield tag="090" ind1="" ind2="">
    <subfield code="a">954921333005</subfield>
  </datafield>
  <datafield tag="856" ind1="" ind2="">
    <subfield code="u">http://il-sfx06:3210/mit?url_ver=Z39.88-
2004&amp;ctx_ver=Z39.88-2004&amp;ctx_enc=info:ofi/enc:UTF-
8&amp;rfr_id=info:sid/sfxit.com:opac_856&amp;url_ctx_fmt=info:ofi/
fmt:kev:mtx:ctx&amp;sfx.ignore_date_threshold=1&amp;rft.object_id=9
54921333005&amp;svc_val_fmt=info:ofi/
fmt:kev:mtx:sch_svc&amp;svc.fulltext=yes&amp;</subfield>
  </datafield>
  <datafield tag="866" ind1="" ind2="">
```

**Aleph Sequential Format**

The Aleph sequential export option allows the exporting of active data from the SFX database in the Aleph sequential MARC format. The export can then be used as a holdings file to be loaded into the Aleph catalog.

The following tags are used in the Aleph sequential format:

- LDR 8th character: SFX objectType (either 's' for serial or 'm' for monograph)  
For example:

```
00000nam-a22-----z--4500
```

- 008: date in YYMMDD format (in 1-4th position) and language code in ISO 639-2 standard format (in 35-38th position). For example:

```
101124s-----000---chi-d
```

- 010 subfield a: LCCN number
- 020: ISBNs and eISBNs. This is a repeatable field for when the object has more than one print or electronic ISBN/eISBN.
- 022 subfield a: ISSN
- 030 subfield a: CODEN

- 090 subfield a: OBJECT number of the journal in the SFX database
- 210 subfield a: abbreviated title information
- 245 subfield a: journal title
- 260 Imprint
  - subfield a: Place of publication
  - subfield b: Name of publisher
  - subfield c: Date of publication
- 100 subfield a: Main Author (personal name)
- 110 subfield a: Main Author (corporate name)
- 111 subfield a: Main Author (meeting name)
- 650 Category information (This field is included only if the option to include categories is selected.)
  - subfield a: category
  - subfield x: subcategory
- 700 subfield a: Additional Author (personal name)
- 710 subfield a: Additional Author (corporate name)
- 711 subfield a: Additional Author (meeting name)
- 776 subfield x: eISSN
- 856 subfield u and y: OpenURL and link text (optional)
- 866 subfield a: activation status information
- 866 subfield b: Raw local threshold information (shown only for local thresholds)
- 866 subfield s: target service Internal ID
- 866 subfield t: target Internal ID
- 866 subfield x: target name and service
- 866 subfield z: object portfolio Internal ID
- 945 field: this field is exported only for CJK language objects
  - Subfield c: original language title (is included only for Chinese objects) contains Simplified Chinese titles
  - Subfield m: main title
  - Subfield s: normalized title used for sorting purposes. The normalized title differs according to the country setting. The country value is set in the searchable A-Z version 3 configuration for the default profile.



- Chinese titles: In China, this subfield contains the title in Pinyin. In Taiwan, this subfield contains the title's stroke sequence number.
- Korean titles: This subfield contains the title in Hangul.
- Japanese titles: This subfield contains the title in Katakana or Hiragana.
- Subfield t: original language title

To produce an export file in Aleph sequential format, first follow the steps in **Manual Export** on page 203 and then continue with the following steps:

- 1 (Optional) In the **Specify export file prefix** field, specify a prefix to be added to the export file. This is an optional feature that makes it easier to find the export file later.  

A prefix can also be used to distinguish partial exports (for example, using only selective targets) from a complete export.
- 2 In the **Specify base URL (856 \$u)** field, specify the base URL of your instance.
- 3 In the **link text (856\$y)** field, specify the link text information to be included for each record in the XML file. Each record of the resulting export file contains an OpenURL and a link text in the 856 field.
- 4 To add categories in the <650> MARC field (optional), select the **Add categories to the export file** check box.  

Category information is exported according to the Active mode in the Category Setup tool. Depending on the setup, SFX exports Ex Libris categories, translated categories, or local categories and corresponding assignments.
- 5 To include a serviceType restriction in the OpenURL, select the **Include service type restriction in 856 URL** check box. By default, a serviceType restriction is included that limits the SFX services in the resulting SFX menu to only those with serviceTypes included. Clearing the check box removes this element from the OpenURL.  

For more information on serviceType restrictions in the OpenURL, see **ServiceType Feature** on page 418.
- 6 To include author information in the SFX database, select the **Include author information** check box.
- 7 If Chinese titles are included in the export, select **Simplified Chinese Title**, **Traditional Chinese Title** or **Both Simplified and Traditional Chinese Titles** to include the type of Chinese titles you want in the title field.
- 8 Click **Submit**.

---

**NOTE:**

If more than one institute is selected in the Institute selection box and institute thresholds are different between institutes, multiple 866 MARC tags — one per threshold — are included.

---

The following is an example of a record in the Aleph sequential format:

```
000000002 LDR L 00000nas-a22-----z--4500
000000002 008 L 101124s-----000---eng-d
000000002 090 L $$a954925377920
000000002 210 L $$aBULL AMER METEOROL SOC
000000002 210 L $$aB AM METEOROL SOC
000000002 210 L $$aB AM METEOR
000000002 210 L $$aAMERICAN METEOROLOGICAL SOCIETY BULLETIN
000000002 210 L $$aBULL AM METEOROL SOC
000000002 210 L $$aBULL. AM. METEOR. SOC
000000002 245 L $$aBulletin of the American Meteorological Society
000000002 260 L $$aEaston, Pa.$$bAmerican Meteorological Society
000000002 022 L $$a0003-0007
000000002 776 L $$x1520-0477
000000002 856 L $$uhttp://demo.exlibrisgroup.com:3210/
demo?url_ver=Z39.88-2004&ctx_ver=Z39.88-2004&ctx_enc=info:ofi/
enc=UTF-8&rfr_id=info:sid/
sfxit.com:opac_856&url_ctx_fmt=info:ofi/
fmt:kev:mtx:ctx&sfx.ignore_date_threshold=1&rft.object_id=9549253
77920&svc_val_fmt=info:ofi/
fmt:kev:mtx:sch_svc&svc.fulltext=yes&$$ySFX linking
000000002 866 L $$aAvailable from 2000. $$b$obj-
>parsedDate('>=', '2000', undef, undef)$$s177700000000000002$$t177700
00000000002$$xTest 1:Full Text$$z177700000000000002
000000002 650 L $$aEarth Sciences$$xGeophysics
000000002 650 L $$aEarth Sciences$$xMeteorology
000000002 650 L $$aEnvironmental Sciences$$xAtmospheric Science
000000002 650 L $$aPhysics$$xAtmospheric Physics
```

### **KBART Format**

To produce an export file in KBART format, first follow the steps in [Manual Export](#) on page 203 and then continue with the following steps:

- 1 If Chinese titles are included in the export, select **Simplified Chinese Title**, **Traditional Chinese Title**, or **Both Simplified and Traditional Chinese Titles** to include the type of Chinese titles you want in the title field.
- 2 Click **Submit**.

The export tool creates one or more tab-delimited TXT files, one per target. Then, the set of files is zipped to create one archive file.

TXT file name format:

```
<Target public name>[_<institute>]_<Subtarget public name>_<YYYY-
MM-DD>.txt
```

ZIP file name format:

```
export_kbart_[<institute>]_YYYYMMDDHHMMSS.zip
```

**NOTES:**

To avoid problems with UNIX not handling file names with specific characters, the following characters will be removed from the target and subtarget names:

```
\ / , : * ? # " < > | . ! @ # $ % ^ & ( ) + { } [ ] ~ ` ' +  
= ;
```

The first row of each tab-delimited TXT file is a header row with KBART standardized field labels for each column that indicate the content of the field. (See **Table 24** for a list of the fields).

Each publication is given a separate line of the file, with a column for each field. A publication is listed more than once in the file when there are coverage gaps. For example, if a portfolio has a threshold statement such as the following, the KBART file contains two lines, each with different coverage information:

```
From 2000 until 2003
```

```
From 2005 onwards
```

Table 24. KBART Format

Column	Description
publication_title	Publication title
print_identifier	Print-format identifier (for example, ISSN, ISBN, etc.)
online_identifier	Online-format identifier (for example, eISSN, eISBN, etc.)
date_first_issue_online	Date of first issue available online
num_first_vol_online	Number of first volume available online
num_first_issue_online	Number of first issue available online
date_last_issue_online	Date of last issue available online (or blank, if coverage is to present)
num_last_vol_online	Number of last volume available online (or blank, if coverage is to present)
num_last_issue_online	Number of last issue available online (or blank, if coverage is to present)
title_url	Title-level URL
first_author	First author (for monographs)
title_id	Title level JKEY

Table 24. KBART Format

Column	Description
embargo_info	<p>Embargo information. Consists of 3 parts:</p> <ul style="list-style-type: none"> <li>■ type – can be:               <ul style="list-style-type: none"> <li>■ R – available</li> <li>■ P – not available</li> </ul> </li> <li>■ length (digits)</li> <li>■ units – can be:               <ul style="list-style-type: none"> <li>■ D – days</li> <li>■ M – months</li> <li>■ Y – years</li> </ul> </li> </ul> <hr/> <p><b>NOTE:</b>            The units field also indicates the granularity of the embargo, that is, how frequently the moving wall moves.</p>
coverage_depth	<p>Coverage depth (SFX service type in parenthesis):</p> <ul style="list-style-type: none"> <li>■ fulltext (getFullTxt, getHolding)</li> <li>■ abstracts (getAbstract, getTOC)</li> <li>■ selected articles (getSelectedFullTxt)</li> </ul>
coverage_notes	Coverage notes
publisher_name	Publisher name (if not given in the file's title)

**NOTE:**

If the same object has both an active getFullTxt and a getSelectedFullTxt portfolio and both service types have been selected for inclusion in the export, two rows are included in the KBART export, one for each service type.

The following export limitations apply to the KBART format:

- If more than one institute is selected in the Export tool Institute drop-down list, there is no indication which institution subscribes to which entry in the KBART file.
- Related object information is not included in the KBART file.
- The following optional KBART II fields are currently not supported:
  - date\_monograph\_published\_print

- `date_monograph_published_online`
- `monograph_volume`
- `monograph_edition`
- `first_editor`
- `parent_publication_id`

---

**NOTE:**

In the KBART file name, as defined in the KBART standard, an underscore (\_) is used to separate SFX targets, subtargets, and institutes. If an SFX target, subtarget, or institute name includes a hyphen (-), it is difficult to differentiate between the different elements in the KBART file name.

---

### **PubMed XML LinkOut Format**

The PubMed XML LinkOut export option allows the exporting of active data from the SFX database in the LinkOut XML format, as described by PubMed.

The export can then be used as a holdings file to be submitted using the LinkOut Library Submission Utility. More information about LinkOut can be found at:

<http://www.ncbi.nlm.nih.gov/projects/linkout/doc/liblinkout.html>

The XML format is described at:

<http://www.ncbi.nlm.nih.gov/books/NBK3807/>

To produce an export file in PubMed XML format, first follow the steps in **Manual Export** on page 203 and then continue with the following steps:

- 1 Enter the location of the SFX `.gif` (URL).
- 2 Enter the SFX base URL.
- 3 Enter the provider ID.
- 4 Enter the URL link text. This should consist of a short phrase that describes the link, such as **Link to OpenURL service** or **Link to SFX**.
- 5 If Chinese titles are included in the export, select **Simplified Chinese Title**, **Traditional Chinese Title** or **Both Simplified and Traditional Chinese Titles** to include the type of Chinese titles you want in the title field.
- 6 Click **Submit**.

The following is an example output:

```
<?xml version="1.0" encoding="UTF-8" ?>
<!DOCTYPE LinkSet (View Source for full doctype...)>
<LinkSet>
  <Link>
    <LinkId><instance></LinkId>
    <ProviderId>12</ProviderId>
    <IconUrl
      LNG="EN">http://demo.exlibrisgroup.com:3210/demo/sfx.gif</
IconUrl>
    <ObjectSelector>
      <Database>PubMed</Database>
      <ObjectList>
        <Query>"0001-8791" [is] AND "last 24 months" [dp]</Query>
        <Query>"0003-987X" [is] AND 1998:2010 [dp]</Query>
        <Query>"1072-4710" [is] AND 1998:2010 [dp]</Query>
          <Query>"0001-6314" [is] AND 1998:2010 [dp] NOT "last 1 year"
[dp]
          NOT future [sb] </Query>
        <Query>"0001-4575" [is] AND "last 24 months" [dp]</Query>
        <Query>"0012-6667" [is] AND 1998:2010 [dp]</Query>
        <Query>"0003-3928" [is] AND "last 24 months" [dp]</Query>
        <Query>"0001-1843" [is] AND 2000:2010 [dp]</Query>
        <Query>"1521-2491" [is] AND 1999:2010 [dp]</Query>
      </ObjectList>
    </ObjectSelector>
    <ObjectUrl LNG="EN">
      <Base> http://demo.exlibrisgroup.com:3210/demo</Base>
      <Rule>?sid=Entrez:PubMed&id=pmid:lo.id</Rule>
      <UrlName>Link To SFX</UrlName>
    </ObjectUrl>
  </Link>
</LinkSet>
<Query> "J Cell Biol" [ta] AND 1997/06/15:2010/12/31 [dp]</Query>
<Query>"0960-9822" [is] AND 1991/01/01:2030 [dp] NOT "last 12
months" [dp]NOT future[sb]</Query>
```

After exporting, SFX matches the journals included in the export file against the latest PubMed journal list and removes journals not in PubMed (as per PubMed LinkOut requirements).

The journal list, which is updated daily, is taken from:

[ftp://ftp.ncbi.nih.gov/pubmed/J\\_Medline.txt](ftp://ftp.ncbi.nih.gov/pubmed/J_Medline.txt)

If the same journal is available from multiple providers, the threshold statements are merged into one coverage statement. For example, for an object with ISSN 0033-3174 :

```
Portfolio 1 ($obj->parsedDate('>=', '1995', '57', '1'))
Portfolio 2 ($obj->parsedDate('>=', '1939', '1', '1')) &&
($obj->timediff('>', '2y'))
```

The coverage statement in the Pubmed export is the following:

```
<Query>"0033-3174" [is] AND 1939:2030 [dp]</Query>
```

The embargo statement is dropped, since there is a portfolio without an embargo.

### **Google Scholar Format**

The Google Scholar export option allows the exporting of active full text data from the SFX database in the export format required for the Google Scholar source. This holdings information, in addition to registration for Google Scholar, are the two requisites for using the Google Scholar source. For more information on the Google Scholar source, refer to the **Google Scholar** section of the *SFX Source Configuration Guide*.

Once registration is complete and a set of export files are created, the files are harvested by Google once every week and are used by Google to indicate in the Google Scholar search results when electronic full text is available from the end user's institutional library.

Additionally, the Google Scholar export format can be used by Ex Libris Primo Central and OCLC to retrieve holdings information from SFX. When creating or scheduling the creation of an export file for Primo Central or OCLC, do not compress the export file.

To produce an export file in Google Scholar format, first follow the steps in **Manual Export** on page 203. Make sure you select both **Serials** and **Monographs** types of objects (by default, only **Serials** is selected).

- 1 It is recommended to produce the output files in a compressed format. Select the **Compress output files** check box.

---

#### **NOTE:**

In order for Google to crawl the compressed files, make sure the extension of the Google Scholar holdings files in the registration form ends with `.gzip` instead of `.xml`. Access the registration form from the SFX Admin Center via **Services> Google Scholar Registration** and edit the **URL to Electronic Holdings** field.'

For example, change:

```
http://demo.exlibrisgroup.com:3410/demo/cgi/public/  
get_file.cgi?file=institutional_holding.xml
```

to

```
http://demo.exlibrisgroup.com:3410/demo/cgi/public/  
get_file.cgi?file=institutional_holding.gzip
```

---

- 2 To include author information in the SFX database, select the **Include author information** check box.
- 3 If Chinese titles are included in the export, select **Simplified Chinese Title**, **Traditional Chinese Title** or **Both Simplified and Traditional Chinese Titles** to include the type of Chinese titles you want in the title field.
- 4 Click **Submit**.

---

**NOTE:**

If data from a shared instance is used by a local instance (SFX Consortium Model 2), an export must first be run to create a `.txt` file from the shared instance (restricted to institutes, if appropriate). This must be included in the **Use the following additional export file** field when exporting in Google Scholar format from the local instance.

---

SFX creates export files in the export directory of the SFX instance according to the Google Scholar DTD that can be found at: [http://scholar.google.com/scholar/institutional\\_holdings.dtd](http://scholar.google.com/scholar/institutional_holdings.dtd).

SFX creates a full export named `institutional_holding.xml` and a set of 10 split files:

```
institutional_holding-.prt01.xml
institutional_holding-.prt02.xml
(...)
institutional_holding-.prt10.xml
```

The complete file is split as per Google's recommendations to ensure fast data transfer. Note that Google only downloads the 10 split files if they are available and does not download the complete file. However, since other systems (such as Ex Libris Primo or OCLC) rely on the complete file, SFX generates this file as well.

Additionally, if the option to compress files is selected (recommended for faster data transfer), the export directory contains the same files in compressed format (with the `.gzip` extension):

```
institutional_holding.gzip
institutional_holding-.prt01.gzip
institutional_holding-.prt02.gzip
(...)
institutional_holding-.prt10.gzip
```

It is possible to create Google Scholar holdings files with activation information for a specific institute, by selecting an institute from the institute drop-down list (see **Manual Export** on page 203). In this case, a separate set of export files is created, each with the institute name in the export file name.



For example, if an institute is called `arts`, the file names are the following:

```
institutional_holding-arts.xml
institutional_holding-arts.prt01.xml
institutional_holding-arts.prt02.xml
(...)
institutional_holding-arts.prt10.xml
```

If an older version of the Google export files exist in the instance, SFX removes these files before creating a new set of export files.

---

**IMPORTANT:**

SFX removes only the files that it will later recreate. If a new set of export files is created with the compression option set to `off`, SFX removes only the files with the extension `.xml`. Files with extension `.gzip` are not automatically removed.

---

An example with comments can be found at: [http://scholar.google.com/scholar/institutional\\_holdings.xml](http://scholar.google.com/scholar/institutional_holdings.xml).

The file does not include the name of any of your active target and target services (for example, the provider). It does include coverage information for each of the active portfolios in your instance, but the coverage information is merged, meaning that if the same book or journal is available from two different providers, SFX merges the coverage statements into one summary coverage statement.

Note that blank values for threshold coverage information are ignored when merging coverage information. These blank coverage statements are treated as coverage unknown (not provided by the vendor), not as unlimited or always available.

Note that the Google Scholar file created by SFX also contains the following additional information not documented in the Google Scholar DTD:

- Additional tags:
  - `<eissn>` – includes the ISSN of type ELECTRONIC
  - `<isbn>` – can occur multiple times. Includes ISBNs of type ELECTRONIC, PRINT\_HBK, and PRINT\_PBK.
  - `<sfx_id>` – includes OBJECT\_ID
  - `<object_type>` – values can be JOURNAL, BOOK, DISSERTATION, PROCEEDING, CONFERENCE, REPORT, DOCUMENT, SERIES, NEWSPAPER, TRANSCRIPT, DATABASE, WIRE, CD, MANUSCRIPT, VIDEO, AUDIO, and SCORE.
  - `<title>` – can occur multiple times. Includes titles of type MAIN and ABBREV. Up to four titles are included – first MAIN and then the longest ABBREV. The display title is included – not the normalized title.

- `<AuthorList>` – includes author information.
- `<eisbn>` – Additional ISBNs and eISBNs. This is a repeatable field for when the object has more than one print or electronic ISBN/eISBN.
- Different item type tags according to the service types exported

It is possible to export the following types of services for the Google Scholar format: `getFullTxt`, `getSelectedFullTxt`, `getHolding`, `getAbstract`, and `getTOC`.

Depending on the type of service that exists for a particular exported object, a different `<item type>` tag value is used:

- `<item type="electronic">` – for `getFullTxt` and `getSelectedFullTxt`
- `<item type="other">` – for `getHolding`, `getTOC`, and `getAbstract`

If both a service of type `electronic` and of type `other` exist for one object, two items are created, one with `<item type="electronic">` and one with `<item type="other">`.

In the following example of an output file the object `The Economist` has one active `getFullTxt` portfolio and one active `getHolding` portfolio:

```
<institutional_holdings>
  <item type="electronic">
    <title>The Economist</title>
    <issn>0013-0613</issn>
    <coverage>
      <from>
        <year>1992</year>
      </from>
      <to></to>
    </coverage>
  </item>
  <item type="other">
    <title>The Economist</title>
    <issn>0013-0613</issn>
    <coverage>
      <from>
        <year>1908</year>
        <volume>66</volume>
        <issue>3358</issue>
      </from>
      <to>
        <year>1959</year>
        <volume>193</volume>
        <issue>6069</issue>
      </to>
    </coverage>
  </item>
</institutional_holdings>
<item type="other">
  <title>The Economist</title>
  <issn>0013-0613</issn>
  <coverage>
    <from>
      <year>1908</year>
      <month>3</month>
      <day>15</day>
      <volume>66</volume>
      <issue>3358</issue>
    </from>
    <to>
      <year>1959</year>
      <month>12</month>
      <day>31</day>
      <volume>193</volume>
      <issue>6069</issue>
    </to>
  </coverage>
</item>
```

Note that it is recommended to schedule a regular generation of the holdings files via the Server Admin Utility in the UNIX file system and to select the **Use**

**Compression** option. In this way, the library ensures that compressed and up-to-date files of its holdings are available for the Google Scholar crawlers.

For more information on scheduling the Google Scholar export via the Server Admin Utility, refer to the **Server Admin Utility** section of the *SFX System Administration Guide*.

## CDI Format

To produce an export file in CDI format, first follow the steps in **Manual Export** on page 203 and then continue with the following steps.

The following options are specific for this export:

- Use this file as additional holdings file in another instance

This option is important in SFX consortia set-ups where activations from another instance (the shared or central instance) are included in a local holdings file (for SFX consortia where consortia API has been set up). Select this option if the export is created in a shared or central instance for use in a local instance where the **Use the following additional export file** option is selected.

- Use production full text holdings when publishing to CDI + Production PC key.

This option is used when publishing to CDI when running or scheduling the CDI export in your SFX test instance. Select this option in the sfxst41 instance if you want to use the SFX full text activations from the sfxlcl41 instance instead of the full text activations of the sfxst41 instance. You need to specify the Primo production PC Key.

Full text activations are ignored in the SFX test instance and instead only the search activations and link target activations are published to CDI. For the full text holding file, the SFX production instance activations are used.

---

### IMPORTANT:

It is necessary to open a support case to have this option turned on for the Sandbox PC Key. Make sure to provide the sandbox PC key, the production PC key, and the production holdings URL in the support case to ensure this option can be enabled in the CDI server configuration.

---

The export consists of a tar.gz file in the following format:

```
<INST_code>_cdi_institutional_holding.tar.gz
```

The file is located in a directory such as:

```
<INST_code>_ INST_cdi_institutional_holding
```

The tar.gz contains the following three files:

Table 25. CDI Format

File Name	Description
<INST_code>_INST_holding.xml	Contains CDI Title level full text availability
<INST_code>_db_ids.xml	Contains CDI Database level full text availability
<INST_code>_searchable_dbids.xml	Contains CDI Search activations

The CDI Export file created is accessible from the following URL:

`http://<SFX_base_URL>/cgi/public/get_file.cgi?file=cdi_institutional_holding.tar.gz`

### Export File Naming Conventions

Export files have the following file name convention: for TXT, MARC XML and Aleph Sequential files. (File names for HTML, KBART, PubMed XML LinkOut, and Google Scholar have a different format and are documented in their respective sections):

- If no institutes have been defined in the instance:

```
e-collection-ALL.<timestamp>.<format>
```

- In an instance with at least one institute defined in the instance, institute name information is included in the export file name:

```
e-collection-<institute_name>-<institute_name>.<timestamp>.txt
```

- If all institutes + default activations are included in the export (either no restrictions are selected from the drop-down list or all institutes + default is selected from the drop-down list), ALL is used as the institute name
- If not all institutes are selected or the default is selected, all selected institute names (and/or the default, if applicable) are included in the file name

---

#### NOTE:

If the portion of the file name with the institutes is more than 255 characters, the text multiple-institutes is used for the institute name.

---

See the following tables for some examples:

Table 26. Export File Naming Conventions

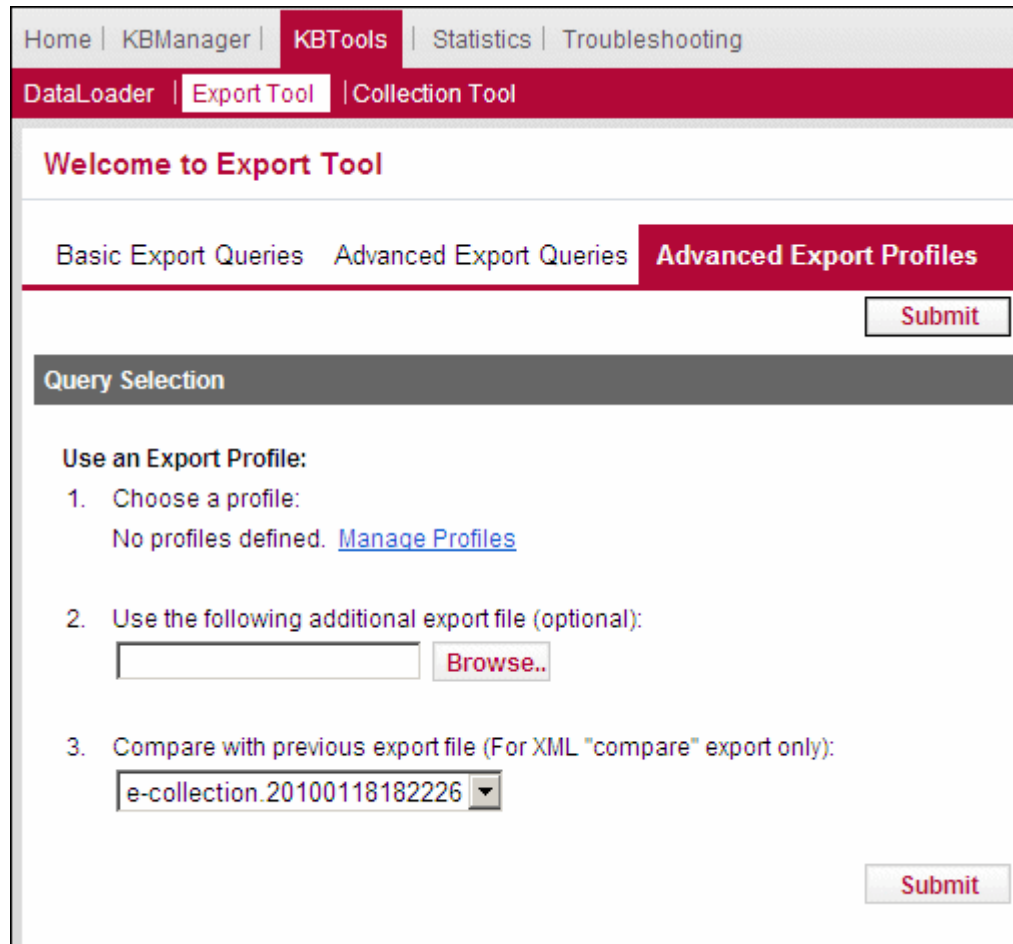
Selected Institutes	File Name
No institute specified in the instance	e-collection-ALL.20150610102044.xml-marc
ALL institutes (InstA+InstB+DEFAULT)	e-collection-ALL.20150610103157.xml-marc
DEFAULT institute	e-collection-default.20150610102556.xml-marc
one institute (InstA)	e-collection-InstA.20150610102807.xml-marc
more than one institute (InstA+InstB)	e-collection-InstA-InstB.20150610102942.xml-marc
more than one institute (InstA+DEFAULT)	e-collection-InstA-default.20150610111507.xml-marc

## Advanced Export Profiles

Instead of setting an export query manually, you can create a predefined export profile.

### To create an export profile:

- 1 From the **Export Tool** window, select the **Advanced Export Profiles** tab. The following window opens:



The screenshot shows the 'Advanced Export Profiles' tab selected in the 'Export Tool' window. The breadcrumb navigation at the top reads: Home | KBManager | **KBTools** | Statistics | Troubleshooting. Below this, the 'Export Tool' sub-navigation shows 'DataLoader', 'Export Tool', and 'Collection Tool'. The main content area has three tabs: 'Basic Export Queries', 'Advanced Export Queries', and 'Advanced Export Profiles' (which is active). A 'Submit' button is located to the right of these tabs. Below the tabs is a 'Query Selection' header. The main instructions are: 'Use an Export Profile:' followed by three numbered steps: 1. 'Choose a profile:' with the text 'No profiles defined. [Manage Profiles](#)'; 2. 'Use the following additional export file (optional):' with an empty text input field and a 'Browse..' button; 3. 'Compare with previous export file (For XML "compare" export only):' with a dropdown menu showing 'e-collection.20100118182226'. A second 'Submit' button is located at the bottom right of the form area.

Figure 92: Advanced Export Profiles

- 2 Click **Manage Profiles**.
- 3 Click **Add Profile**.
- 4 Fill in the fields as described in **Manual Export** on page 203.
- 5 Click **Save Profile**.

### To use an export profile:

- 1 From the **Export Tool** window, select the **Advanced Export Profiles** tab.
- 2 Select an export profile.

- 3 (Optional) In the **Use the following additional export file (optional)** field, specify an additional `.txt` file to be used when generating the export file in a form other than `.txt`.
- 4 (Optional) Select a file with which to compare the export file from the **Compare with previous export** field. This option exports and compares the export file with a previously created export file.
- 5 Click **Submit**.

## Collection Tool

This section includes the following:

- **Collection Tool Overview** on page 240
- **Main** on page 241
- **Last Results** on page 250
- **Reports** on page 250
- **Scheduled Queries** on page 256

### Collection Tool Overview

The Collection tool allows you to compare the titles available in different packages or sets of packages. This allows you to determine the level of overlap in the packages to which you subscribe, or check whether your holdings are incomplete. With this information, you can fine-tune your subscriptions to meet your institution's needs. To start the Collection tool, from the KBTools section of the Data Management area, click **Collection Tool**. The following window opens:



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

DataLoader | Export Tool | **Collection Tool**

### Welcome to Collection Tool

**Main** | Last Results | Reports | Scheduled Queries

The Collection Tool is designed to provide information assisting purchasing and cancellation decisions. This includes information about which titles with what coverage are gained with the purchase of a new package and which titles with what coverage are lost with the cancellation of a package.

It allows the comparison of the following sets of data. (Click on the selected option to start the wizard)

- [Compare packages/sets of packages](#)
- [Check for duplicate titles within your holdings](#)  
This option creates a report on unique coverage versus overlap using the active FT holdings list.
- [Check where titles are available from and what your coverage is in each package](#)  
This option creates a report based on a list of titles that you submit. The report includes information on unique coverage versus overlap for these titles.

**Note:** The tool includes only titles that are available in electronic fulltext (getFullTxt service); it does not include abstract or table of content services (getAbstracts, getFullTxt).

The tool creates different output reports depending on what conditions are chosen.

Example: A comparison between one package and a set of packages, including date coverage, creates reports for:

- Unique titles - Titles that exist in only one of the two sets
- Title overlaps - Titles that exist in both sets
- Complete overlaps - Titles that exist in both sets and have identical date coverage
- Partial overlaps - Titles that exist in both sets and have overlapping but not identical date coverage

Other tabs:

- Last results - Contains the last run query with links to the reports
- History - Lists previously run queries including links to the reports
- Scheduled queries - Lists all the queries that are scheduled to run at a later time

For more details, refer to the SFX documentation.

Figure 93: Collection Tool

## Main

In the **Main** tab, select one of the following options:

## Compare Packages/Sets of Packages

This option allows the comparison of either individual packages or sets of packages and produces various reports, such as reports on unique titles, partial overlaps, and full overlaps.

- 1 From the Main tab, click **Compare packages/sets of packages**. The following dialog box opens.

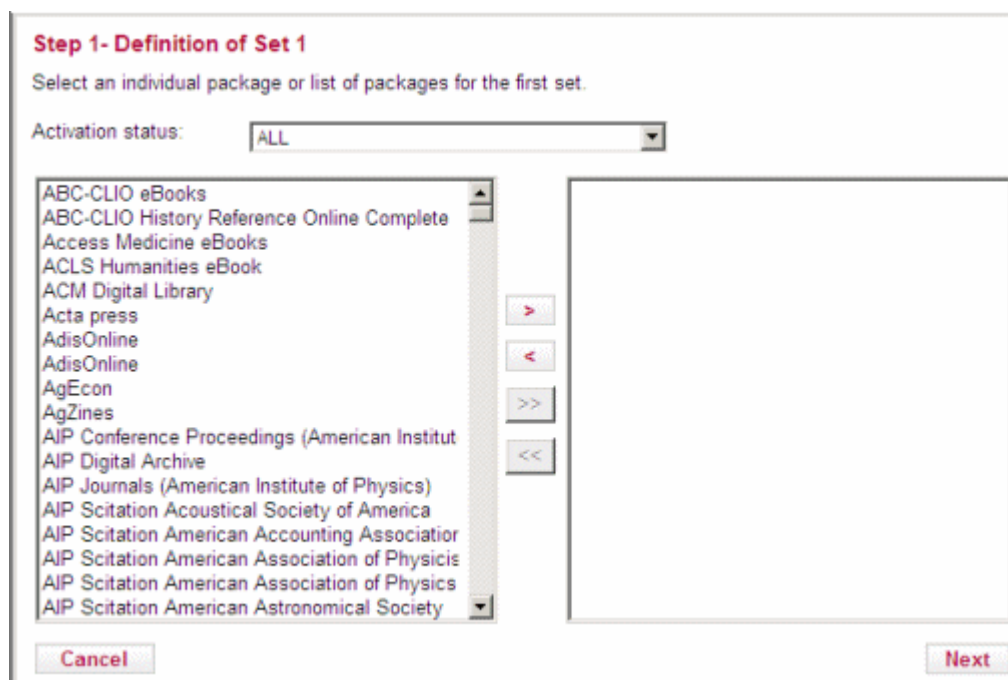


Figure 94: Step 1 - Definition of Set 1

- 2 Select an activation status:
  - **ALL** – Displays all packages
  - **ACTIVE** – Displays active packages
  - **INACTIVE** – Displays inactive packages
- 3 Select an institute. To view packages available to all institutes, select **DEFAULT**.

---

### NOTE:

If no institutes are defined in SFX, the Institutes field is not displayed.

---

- 4 Select a package from the selection box on the left. Use the CTRL key to select multiple packages.
- 5 Select one of the following options:

- To move the selected packages to the selection box on the right, click the red right arrow button.
- To move all packages to the selection box on the right, click the right double arrows.

**NOTE:**

To remove selected packages from the selection box on the right, click the red left arrow and to remove all packages from the selection box on the right, click the left double arrows.

- 6 Click **Next**. The following dialog box opens:

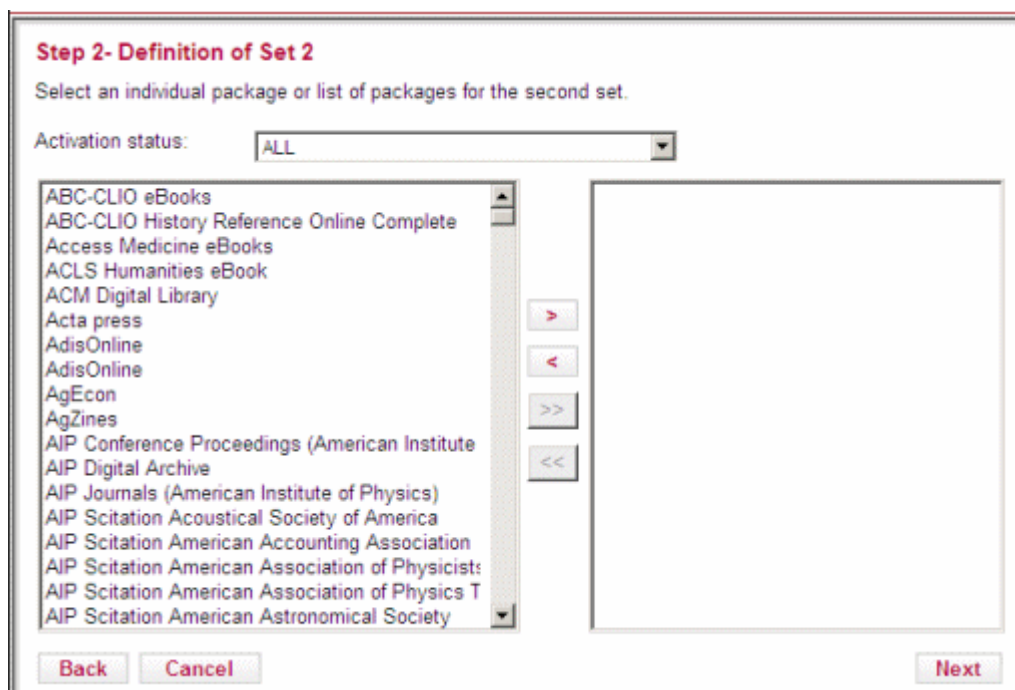


Figure 95: Step 2 - Definition of Set 2

- 7 Select an individual package or several packages for the second set as described in steps 2-6.
- 8 Click **Next**. The following dialog box opens:

**Step 3 - Report Settings**

Report name:

Report description:

Schedule report run [?](#) [click here](#)

**Note:** If you choose more than one package with a large number of titles, the report may take some time to generate.

Use date coverage information in the comparison [?](#)

Date coverage to use:  Active [?](#)  Global [?](#)

Reference year for calculating "embargo" and current subscriptions: [?](#)

E-mail: [?](#)

Figure 96: Step 3 - Report Settings

- 9 Enter a name and description for the report.
- 10 To have the system generate the report at a later time, select **Schedule report run** and enter a date and time.
- 11 To have the system take the coverage date into account when comparing packages, select **Use date coverage information in the comparison**. If this option is not selected, only the title is used in the comparison.

---

**NOTE:**

During threshold comparison, the month and day information is ignored as part of the parsedDate threshold date information. Only year information is taken into account.

---

- 12 Select the date coverage to use:
  - **Active** – Compares titles using local date coverage if it is defined. If local coverage is not defined, the global date coverage is used.
  - **Global** – Compares titles using the global date coverage. Locally defined date coverages are ignored.
- 13 Select the reference year for calculating embargo and current subscriptions. The reference year chosen affects how moving wall and embargo coverages are translated into date coverage (in format YYYY), which influences overlap reports.

14 Select a group/institute activation calculation algorithm:

- **Inheritance** – Includes packages available to the consortium with which the institute is affiliated.
- **Explicit** – Includes only packages to which the institute itself subscribes in the comparison.

---

**NOTE:**

If no institutes are defined in SFX, the **Inheritance** and **Explicit** fields are not displayed.

---

15 To enter an e-mail address to which to send the report, select **E-Mail**. Separate addresses with a semicolon.

16 Click **Submit**. Reports are available in the Reports tab after they are generated.

The report files created by the Collection tool are stored in the SFX instance in the following location:

```
exlibris/sfx_ver/sfx4_1/<instance>/export/collection_tool/
```

Each set of reports is stored in a separate directory.

### ***Check for Duplicate Titles Within Your Holdings***

This option creates a report on duplicates and overlaps within the currently active full-text holdings in the KnowledgeBase.

- 1 In the Main tab, click **Check For Duplicate Titles Within Your Holdings**. The following dialog box opens:

**Report Settings**

Report name:

Report description:

Institutes:

Schedule report run  **Note:** If you choose more than one package with a large number of titles, the report may take some time to generate.

Use date coverage information in the comparison

Date coverage to use:  Active   Global

Reference year for calculating "embargo" and current subscriptions:

E-mail:

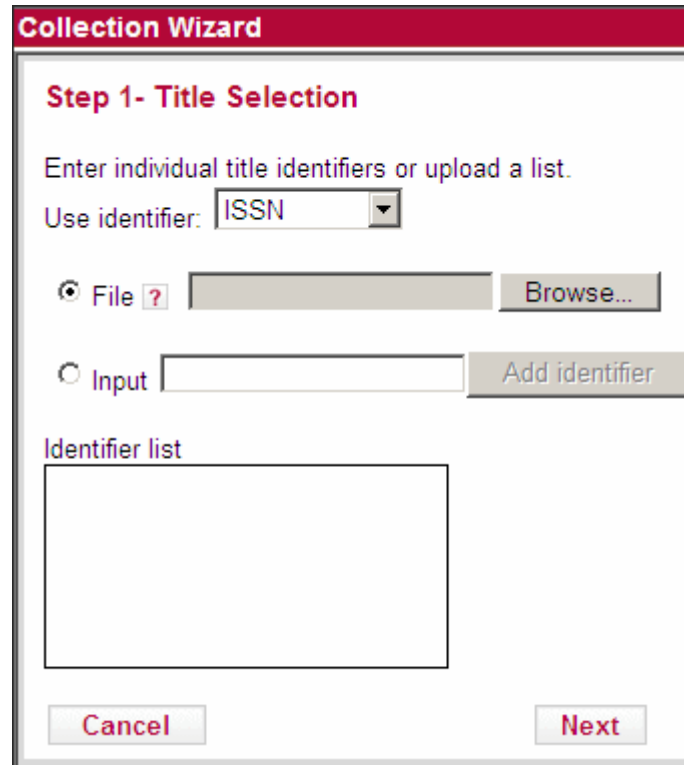
Figure 97: Report Settings

- 2 Fill in the fields as described in steps 9-16 in the previous procedure.
- 3 Click **Submit**. Reports are available in the Reports tab after they are generated.

### ***Check Where Titles Are Available From and What Your Coverage Is in Each Package***

This option creates a report based on a list of titles that the library uploads. It creates a report similar to the one created by the second option, but based on the title list rather than on the library's complete holdings.

- 1 In the Main tab, click **Check where titles are available from and what your coverage is in each package**. The following dialog box opens.



**Collection Wizard**

**Step 1- Title Selection**

Enter individual title identifiers or upload a list.

Use identifier:

File

Input

Identifier list

Figure 98: Step 1- Title Selection

- 2 Select an identifier with which to filter the objects in the package you selected. Only the objects that meet this criterion are used in the comparison.
- 3 Do one of the following:
  - Select **File** to import a list of identifiers from a file.
  - Select **Input** to manually enter an identifier. The identifiers are displayed in the **Identifier List** box. To remove the identifier, click **Remove**.

---

**NOTE:**

If you choose to import an input file, it must be a text tab-delimited file using Microsoft Excel. Prepare the file containing ISSN, ISBN, LCCN, or OBJECT\_ID information in the first column. In the **Use Identifier** field, select the format that matches the primary key (column one) of the input file (either ISSN, ISBN, LCCN, or OBJECT\_ID). The input file should not contain a header line.

---

- 4 Click **Next**. The following dialog box opens:

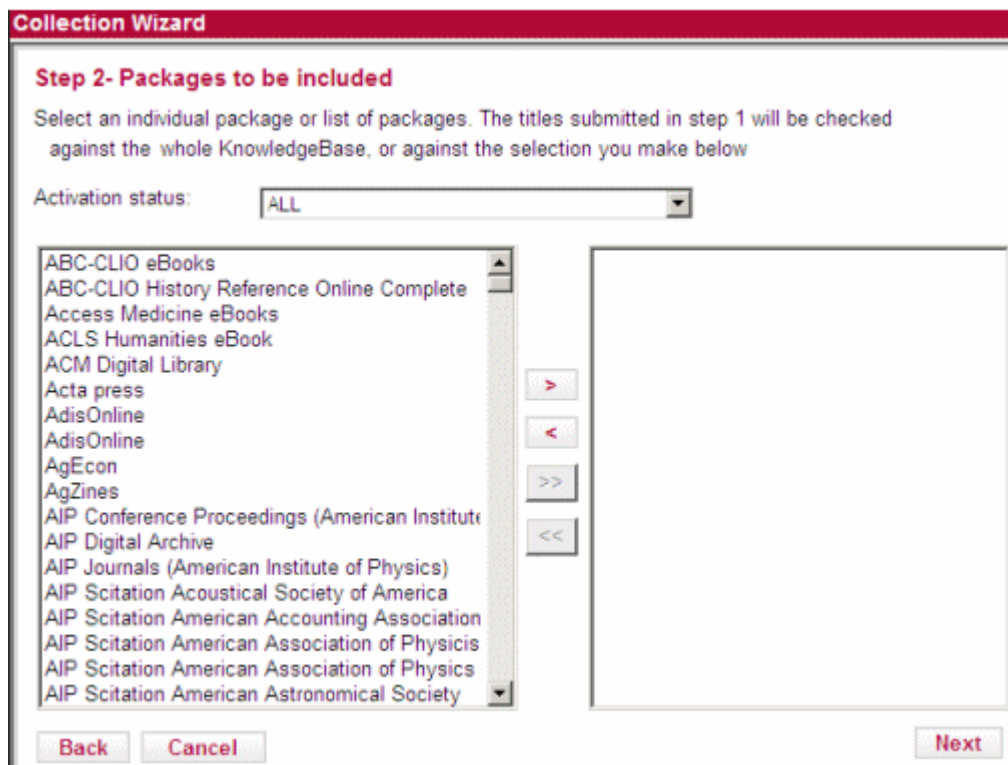


Figure 99: Step 2 - Packages to Be Included



- 5 Fill in the information as described in steps 2-6 in the first procedure. The following dialog box opens:

**Report Settings**

Report name:

Report description:

Institutes:

Schedule report run  **Note:** If you choose more than one package with a large number of titles, the report may take some time to generate.

Use date coverage information in the comparison

Date coverage to use:  Active   Global

Reference year for calculating "embargo" and current subscriptions:

E-mail:

Figure 100: Step 3 - Report Settings

- 6 Fill in the information as described in steps 9-16 in the first procedure.
- 7 Click **Submit**. Reports are available in the Reports tab after they are generated.

## Last Results

To view the previously generated report, click the **Last Results** tab. The following window opens, showing a summary report:

Home | KBManager | **KBTools** | Statistics | Troubleshooting  
 DataLoader | Export Tool | **Collection Tool**

Welcome to Collection Tool

Main | **Last Results** | Reports | Scheduled Queries

### Report:Database

Description:  
 Running Date: 2010-01-25

	Num. of Titles	unique	complete overlap (holdings)	partial overlap	Title overlap	% unique titles	% complete overlap	% partial overlap	% Title overlap
Set 1	11739	10298	0	0	1441	87.7	0.0	0.0	12.3
Cambridge University Press Journals Complete	277	249	0	0	28	89.9	0.0	0.0	10.1
EBSCOhost Academic Search Alumni Edition	1	0	0	0	1	0.0	0.0	0.0	100.0
EBSCOhost Academic Search Complete	1	0	0	0	1	0.0	0.0	0.0	100.0
EBSCOhost Academic Search Elite	1	0	0	0	1	0.0	0.0	0.0	100.0
EBSCOhost Academic Search Premier	4814	3427	0	0	1387	71.2	0.0	0.0	28.8
EBSCOhost Academic Source Complete	1	0	0	0	1	0.0	0.0	0.0	100.0
EBSCOhost Academic Source Premier	1	0	0	0	1	0.0	0.0	0.0	100.0
EBSCOhost Advanced Placement Source	1	0	0	0	1	0.0	0.0	0.0	100.0
Highwire Press American Society of Hematology	1	1	0	0	0	100.0	0.0	0.0	0.0
netLibrary	2	2	0	0	0	100.0	0.0	0.0	0.0

**Files:**

- [Summary HTML Report](#)
- [Summary Report](#)
- [Unique titles report](#)
- [Overlap titles report](#)
- [Report Parameters](#)

Figure 101: Last Results

See **Reports** for detailed information concerning the different report options.

## Reports

To view a list of all the reports, click the **Reports** tab. The following window opens:

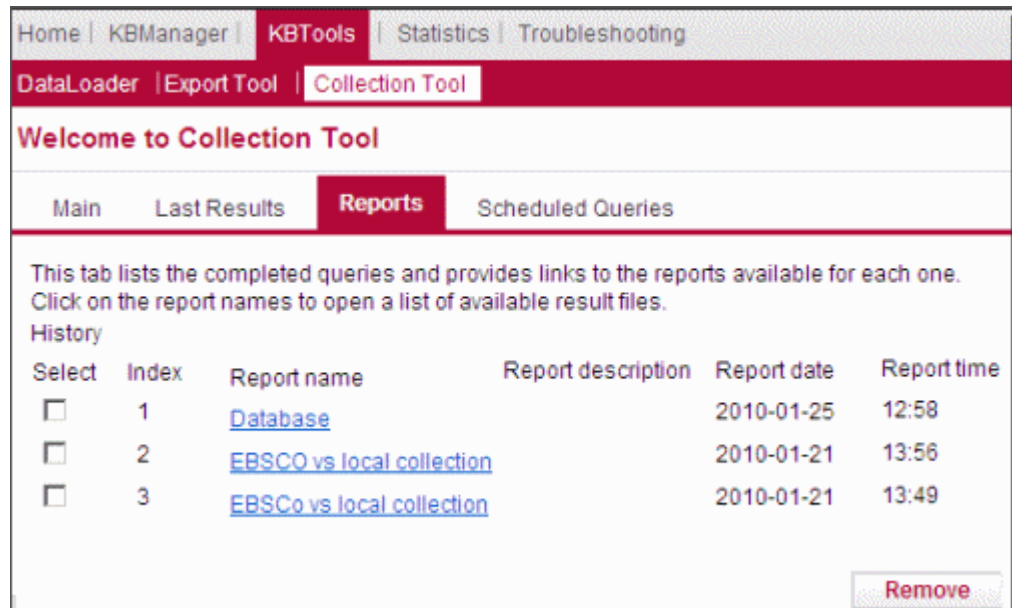


Figure 102: Reports

To display the list of report options available for a report, click the name of a report. To remove a report from the list, select the check box next to a report and click **Remove**.

**NOTE:**

Depending on the specific report that was generated, not all report options listed in the next section are available. A report option that results in an empty file is not displayed.

**Use Date Coverage Information in the Comparison Reports**

If you selected **Use date coverage information in the comparison** in the Report Settings page, the following report options are available:

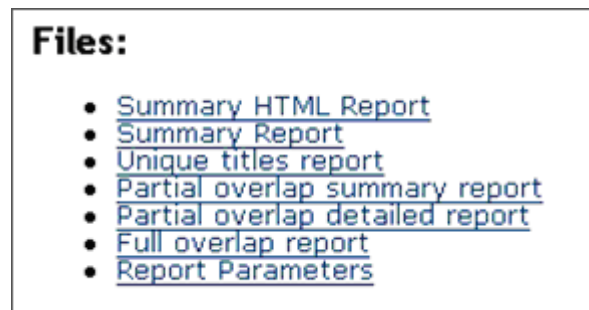


Figure 103: Report Options

The Summary Report table displays the packages and sets of packages in the left column and the statistics concerning overlap in the other columns.

- **Num. of Titles** – The number of titles in the package or group of packages
- **Unique** – The number of titles that exist only in one of the two sets
- **Complete Overlap** – The number of titles existing in both sets that have identical date coverage
- **Partial Overlap** – The number of titles that exist in both sets but do not have identical date coverage
- **Title Overlap** – The number of titles that exist in both sets. This column is used when date coverage is not used in the calculation, when no date coverage exists in the SFX KB or when the date coverage does not overlap at all.

Additionally, the summary report contains percentage information that is calculated by dividing the unique or overlap count by the total number of titles.

---

**NOTE:**

If the dates of one title begin before and/or extend after the dates of the other, the titles are considered to partially overlap.

---

### **Compare Packages/Sets of Packages Reports**

The following reports are available when selecting **Compare packages/sets of packages**:



Figure 104: Report Options - Expanded

- **Summary HTML Report** – A summary report in HTML format
- **Summary Report** – A summary report in text format

■ **Unique Titles Report** – A report of the unique titles:

	A	B	C	D	E	F
1	Set	ID	TITLE	OBJECT_ID	Coverage	Status
2	Set 1	0001-4001	Chirurgia	954926271367	1998-1999	INACTIVE
3	Set 1	0001-6160	Acta metallurgica	954926335678	1953-1999	INACTIVE
4	Set 1	0001-8716	Advances in molecular relaxation	954928467031	1967-1977	INACTIVE
5	Set 1	0002-1571	Agricultural meteorology	954928468040	1964-1994	INACTIVE
6	Set 1	0002-9416	American journal of orthodontics	954927516535	1948-1996	INACTIVE
7	Set 1	0003-4043	Annals of mathematical logic	954920471000	1970-1992	INACTIVE
8	Set 1	0004-6961	Atmospheric environment	954927523691	1967-1999	INACTIVE
9	Set 1	0005-2744	Biochimica et Biophysica Acta	110978976774621	1967-1991	INACTIVE
10	Set 1	0005-2787	Biochimica et Biophysica Acta	110978976774625	1963-1991	INACTIVE

Figure 105: Unique Titles Report

■ **Partial Overlap Summary Report** – A summary report of partial overlaps:

A	B	C	D	E	F	G	H	I	J
Set	ID	TITLE	OBJECT_ID	Coverage Set 1	Coverage Set 2	Overlap	Unique coverage Set 1	Unique coverage Set 2	
Set 1	0001-1541	AICHE journal	954925372782	1974-1983	1995-	1974-1983		1995-1973, 1984-	
Set 1	0001-2092	AORN journal	954927510400	1970-	1995-	1995-	1970-1994		
Set 1	0001-4575	Accident analysis and prevention	954925373791	1969-	1995-	1995-	1969-1994		
Set 1	0001-6918	Acta Psychologica	954925374822	1936-	1995-	1995-	1936-1994		
Set 1	0001-706X	Acta Tropica	954925374825	1989-	1995-	1995-	1989-1994		
Set 1	0001-8686	Advances in colloid and interface science	954925374834	1967-	1995-	1995-	1967-1994		
Set 1	0001-8708	Advances in mathematics	954922644001	1965-	1993-	1993-	1965-1992		
Set 1	0001-8791	Journal of Vocational Behavior	954922644002	1971-	1993-	1993-	1971-1992		
Set 1	0002-8223	Journal of the American Dietetic Association	954925376872	1993-	1989-	1993-		1989-1992	

Figure 106: Partial Overlap Summary Report

■ **Partial Overlap Detailed Report** – A detailed report of partial overlaps:

A	B	C	D	E	F	G	H	I	J
Set	ID	TITLE	OBJECT_ID	OBJECT_PORTFOLIO_ID	Target	TargetService	Coverage	Unique coverage (compared to other set)	
Set 1	0001-1541	AICHE journal	954925372782	1000000000769559	Elsevier ScienceDirect	getFullTxt	1974-1983		INAC
Set 1	0001-2092	AORN journal	954927510400	1000000000752685	Elsevier ScienceDirect	getFullTxt	1970-	1970-1994	INAC
Set 1	0001-4575	Accident analysis and prevention	954925373791	1000000000751804	Elsevier ScienceDirect	getFullTxt	1969-	1969-1994	INAC
Set 1	0001-6918	Acta Psychologica	954925374822	1000000000751227	Elsevier ScienceDirect	getFullTxt	1936-	1936-1994	INAC
Set 1	0001-706X	Acta Tropica	954925374825	1000000000752639	Elsevier ScienceDirect	getFullTxt	1989-	1989-1994	INAC
Set 1	0001-8686	Advances in colloid and interface science	954925374834	1000000000752642	Elsevier ScienceDirect	getFullTxt	1967-	1967-1994	INAC
Set 1	0001-8708	Advances in mathematics	954922644001	1000000000753553	Elsevier ScienceDirect	getFullTxt	1965-	1965-1992	INAC

Figure 107: Partial Overlap Detailed Report

■ **Full Overlap Report** – A report of full overlaps:

A	B	C	D	E	F	G	H	I	J
Set	ID	TITLE	OBJECT_ID	OBJECT_PORTFOLIO_ID	Target	TargetService	Coverage	Status	
Set 1	0002-6417	Alpha Omega	954927515511	1000000000752650	Elsevier ScienceDirect	getFullTxt	2006-	INAC	
Set 1	0003-066X	American psychologist	954925378935	1000000000752097	Elsevier ScienceDirect	getFullTxt	1946-	INAC	
Set 1	0003-3928	Annales de cardiologie et d'angiologie	954926937685	1000000000751053	Elsevier ScienceDirect	getFullTxt	2001-	INAC	
Set 1	0003-3944	Annales de chirurgie	954925379963	1000000000751049	Elsevier ScienceDirect	getFullTxt	2000-2006	INAC	
Set 1	0003-4487	Annales médico psychologiques	954925379975	1000000000751058	Elsevier ScienceDirect	getFullTxt	2001-	INAC	
Set 1	0003-4975	The Annals of thoracic surgery	954925380985	1000000000752663	Elsevier ScienceDirect	getFullTxt	1995-	INAC	
Set 1	0009-2819	Chemie der Erde	954925389248	1000000000753747	Elsevier ScienceDirect	getFullTxt	2002-	INAC	
Set 1	0010-9452	Cortex	954925393344	1000000000769606	Elsevier ScienceDirect	getFullTxt	1997-	INAC	
Set 1	0011-8486	Dental abstracts	954927531887	1000000000751802	Elsevier ScienceDirect	getFullTxt	2005-	INAC	

Figure 108: Full Overlap Report

- **Title Overlap Report** – A report of title overlaps that do not have coverage overlaps:

	A	B	C	D	E	F	G	H	I
1	Set	ID	TITLE	OBJECT_ID	OBJECT_PORTFOLIO_ID	Target	TargetService	Coverage	Status
2	Set 1	0001-2998	Seminars in Nuclear Medicine	954925373788	1000000000751850	Elsevier ScienceDirect	getFullTtxt	1971-	INACTIVE
3	Set 1	0001-7272	Acta zoologica	954925374828	1000000000769548	Elsevier ScienceDirect	getFullTtxt		INACTIVE
4	Set 1	0003-9993	Archives of physical medicine a	954925382031	1000000000751791	Elsevier ScienceDirect	getFullTtxt	1995-	INACTIVE
5	Set 1	0009-5893	Chromatographia	954925390267	1000000000769592	Elsevier ScienceDirect	getFullTtxt		INACTIVE
6	Set 1	0010-440X	Comprehensive Psychiatry	954925392323	1000000000751801	Elsevier ScienceDirect	getFullTtxt	1960-	INACTIVE
7	Set 1	0022-1112	Journal of fish biology	954922645036	1000000000769652	Elsevier ScienceDirect	getFullTtxt		INACTIVE
8	Set 1	0022-3468	Journal of Pediatric Surgery	954925416974	1000000000751824	Elsevier ScienceDirect	getFullTtxt	1966-	INACTIVE
9	Set 1	0022-460X	Journal of Sound and Vibration	954922648046	1000000000753662	Elsevier ScienceDirect	getFullTtxt	1964-	INACTIVE
10	Set 1	0024-2829	The Lichenologist	954922648051	1000000000769669	Elsevier ScienceDirect	getFullTtxt		INACTIVE

Figure 109: Title Overlap Report

- **Report Parameters** – A report of the parameters used to run the report:

	A	B	C	D
1	Report name:	test-option1		
2	Report description:			
3	Report type:	two_set		
4	Set1 Activation status:	ALL		
5	Set1 list of institutes:	0		
6	Set1 TARGET IDs:	1.1098E+14		
7	Set2 Activation status:	ALL		
8	Set2 list of institutes:	0		
9	Set2 TARGET IDs:	110993827423000,110974887622783		
10	Use date coverage:	on		
11	Date coverage to use:	active		
12	Embargo reference year:	0		
13	Institute availability calculation:	inheritance		
14	E-mail:	<a href="mailto:john.doe@exlibris.co.il">john.doe@exlibris.co.il</a>		

Figure 110: Report Parameters

### Check for Duplicate Titles Within Your Holdings Reports

The following reports are available when selecting **Check for duplicate titles within your holdings**:

Files:	<a href="#">Summary HTML Report</a>
	<a href="#">Summary Report</a>
	<a href="#">Unique titles report</a>
	<a href="#">Overlap titles report</a>
	<a href="#">Report Parameters</a>

Figure 111: Report Options

The following report is unique to this option:

- **Overlap Titles Report** – A report of title overlaps, whether coverage overlaps or not:

A	B	C	D	E	F	G	H	I
Identifier	Title	OBJECT_ID	OBJECT_PORTFOLIO ID	Target	TargetService	Coverage	Unique coverage (compared to other set)	Status
3-19-924937-7	Oxford Handbook of Criminal Justice	10000000000289909	1E+15	EBSCOhost Academic	getFullTxt	2002-2002		ACTI
3-19-924937-7	Oxford Handbook of Criminal Justice	10000000000289909	1E+15	EBSCOhost Academic	getFullTxt	2002-2002		ACTI
3-292-74347-5	Latin America in the 21st Century	10000000000289895	1E+15	EBSCOhost Academic	getFullTxt	2001-2001		ACTI
3-292-74347-5	Latin America in the 21st Century	10000000000289895	1E+15	EBSCOhost Academic	getFullTxt	2001-2001		ACTI
3-471-36099-9	Virtual Reality Technology	10000000000289922	1E+15	EBSCOhost Academic	getFullTxt	2003-2003		ACTI
3-471-36099-9	Virtual Reality Technology	10000000000289922	1E+15	EBSCOhost Academic	getFullTxt	2003-2003		ACTI
3-7355-2400-9	Modern Family Law: Cases & Materials	10000000000289906	1E+15	EBSCOhost Academic	getFullTxt	2003-2003		ACTI
3-7355-2400-9	Modern Family Law: Cases & Materials	10000000000289906	1E+15	EBSCOhost Academic	getFullTxt	2003-2003		ACTI

Figure 112: Overlap Titles Report

### Check Where Titles are Available From and What Your Coverage is in Each Package

The following reports are available when selecting **Check where titles are available from and what your coverage is in each package**:



Figure 113: Report Options

The following reports are unique to this option:

- **Titles Not in DB** – A report of titles not in the database:

	A	B
1	ISSN	
2	0038-3765	
3	0307-1235&030	
4		

Figure 114: Titles Not in DB

- **Titles Without Portfolios** – A report of titles that are not include in any selected portfolio:

	A
1	ISSN
2	0898-5634
3	0892-3132
4	0887-7858
5	0023-1649
6	1092-5503
7	1041-5130
8	0742-4647
9	1073-7561
10	0004-6566
11	0275-2832

Figure 115: Titles Without Portfolios

## Scheduled Queries

To view a list of the scheduled reports, click the **Scheduled Queries** tab. The following window opens:

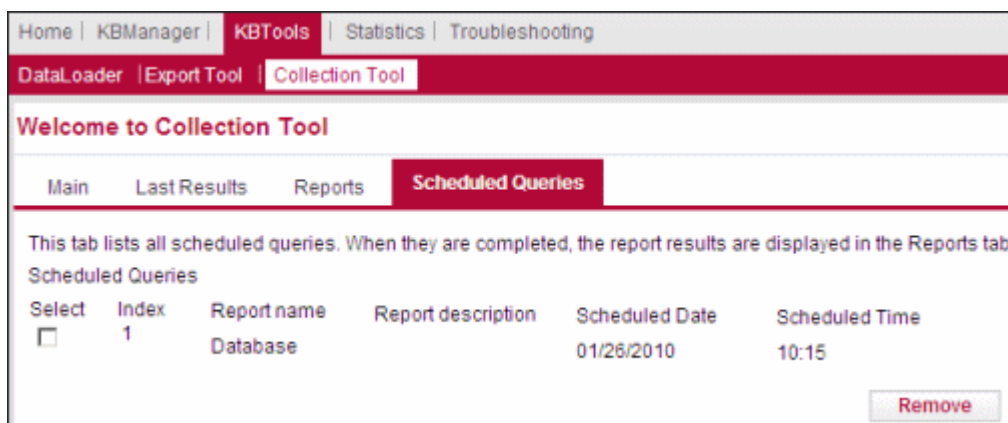


Figure 116: Scheduled Queries

Scheduled queries are automatically removed from the list when the report is generated. To remove a scheduled query from the list, select the check box next to it and click **Remove**. If a scheduled report is removed from this list, the report is not generated.



---

**NOTES:**

To schedule collection tool tasks, you must have permissions to use the UNIX `at` command on the server.

The super user may use the `at` command in all cases. For other users, permission to use `at` is determined by the files `/etc/at.allow` and `/etc/at.deny`, according to the following rules:

- If the file `/etc/at.allow` exists, only user names mentioned in it are allowed to use `at`.
  - If `/etc/at.allow` does not exist, `/etc/at.deny` is checked. Any user name not mentioned in it is allowed to use `at`.
  - If `/etc/at.deny` is empty, all users are allowed use these commands. This is the default configuration.
  - If neither file exists, only the super user is allowed to use `at`.
-



# 5

---

## Statistics

This section includes:

- **Statistics Overview** on page 259
- **Queries** on page 260
- **UStat** on page 269

---

**NOTE:**

For important information and guidelines regarding statistics data maintenance, refer to the *SFX Advanced User's Guide*.

---

## Statistics Overview

The Statistics module is used to produce statistical reports on SFX usage. Reports include the following information for each SFX transaction:

- IP address of user
- Date of the SFX request
- SFX targets displayed in the SFX menu
- SFX targets clicked in the SFX menu
- SFX sources used to send the SFX request to the SFX server (sid)
- Type of SFX service requested
- Whether or not the getFullTxt service was offered in the SFX menu
- Object type
- Institute, user group, and faculty

SFX statistical reports also include attributes of the context object, such as:

- ISSN

- ISBN
- ArticleTitle
- JournalTitle
- BookTitle
- ConferenceTitle

## Queries

This section includes the following:

- **Scheduling Queries** on page 268
- **Scheduled Queries List** on page 269

To create a statistical query, click **Queries** from the Statistics section of the Data Management area.

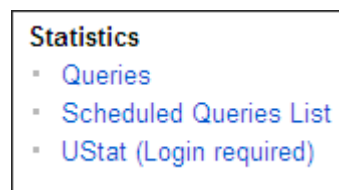


Figure 117: Statistics

The Statistics Queries window opens:

Statistics Queries	
Query	Description
1	<a href="#">Number of requests and clickthroughs per day</a>
2	<a href="#">Number of requests and clickthroughs per source</a>
3	<a href="#">Number of requests and clickthroughs per object type</a>
4	<a href="#">Number of requests and clickthroughs per service type</a>
5	<a href="#">Number of SFX requests with/without full-text services</a>
6	<a href="#">Top target services shown in the SFX menu</a>
7	<a href="#">Number of clickthroughs per target</a>
8	<a href="#">Number of clickthroughs per target service</a>
9	<a href="#">Number of clickthroughs for one particular serial</a>
10	<a href="#">Most popular serials selected by target</a>
11	<a href="#">Most popular journals selected by source</a>
12	<a href="#">Journals requested but have no full-text</a>
13	<a href="#">Selected document delivery targets by source</a>
14	<a href="#">Books accessed via SFX ranked by use</a>
15	<a href="#">Services preferred over full-text</a>
16	<a href="#">Unused full-text journals</a>
17	<a href="#">Number of requests which resulted in SFX menu screen without services</a>
18	<a href="#">Number of requests and clickthroughs by IP address</a>
19	<a href="#">Most popular journals</a>
20	<a href="#">OpenURLs that resulted in no fulltext services, selected by source</a>
21	<a href="#">Unused full-text journals per target</a>

Figure 118: Statistic Queries

The following queries are available:

- 1 Number of SFX requests and clickthroughs per date** – The number of times users clicked the SFX button in all sources over a specified period of time and the number of clickthroughs.
- 2 Number of SFX requests and clickthroughs per source** – The number of times users clicked the SFX button in any particular source (`rec$sourceId`) and the number of clickthroughs; output is sorted by source name.
- 3 Number of SFX requests and clickthroughs sorted by object type** – The number of times SFX services were requested and the number of clickthroughs, based on the type of object. Output is sorted by object type. If

there is no match between the object in the OpenURL and the SFX database, the Object Type used is `genre`.

- 4 **Number of SFX requests and clickthroughs per service type** – The number of SFX requests and clickthroughs for each service type.
- 5 **Number of SFX requests with/without full-text services** – The number of SFX requests that resulted and did not result in full-text services in the SFX menu.
- 6 **Top target services shown in the SFX menu** – The number of times the most popular targets services appeared in the SFX menu.
- 7 **Number of clickthroughs per target** – The number of times specific targets were selected in the SFX menu.
- 8 **Number of clickthroughs per target service** – The number of times specific target services were selected in the SFX menu.
- 9 **Number of clickthroughs for one particular serial** – The number of times one particular full-text journal was selected in the SFX menu for different targets.
- 10 **Most popular serials selected by target** – The number of times the most frequently requested full-text journals were shown and selected in the SFX menu from one particular target.
- 11 **Most popular journals selected by source** – The number of times the most frequently requested full-text journals were shown and selected in the SFX menu from a particular source.
- 12 **Journals requested but have no full-text** – The top journals for which SFX requests resulted in no full-text services in the SFX menu.
- 13 **Selected document delivery targets by source** – The number of times users clicked `getDocumentDelivery` targets in any particular source (`rec$sourceId`).
- 14 **Books accessed via SFX ranked by use** – Books (ISBNs) sorted by usage within a specified time period. Output includes ISBN book title, book OBJECT ID, and the number of times accessed. If multiple ISBNs exist for the object, they are all included in the report. If no title or object ID exists, the statistics result include a line with the text `No title or No object id`.
- 15 **Services preferred over full-text** – The services users are choosing when full-text is available as a service in the SFX menu and users choose another service.
- 16 **Unused full-text journals** – The journals for which there are active full-text portfolios that did not appear in the statistics tables. Note that the RSI index must be built in order for this query to be used. For more information on building this index, refer to the **Rapid Service Indicator** section of the *SFX System Administration Guide*.

- 17 Number of SFX requests which resulted in SFX menu screen without services** – The number of times SFX services were requested and no results were displayed in the SFX menu.
- 18 Number of SFX requests and clickthroughs by IP address** – The number of times SFX services were requested and the number of clickthroughs, sorted by IP address.
- 19 Most popular journals** – The number of times the most frequently requested full-text journals were shown and selected in the SFX menu.
- 20 OpenURLs that resulted in no full-text services, selected by source** – The OpenURLs for a particular source where SFX requests resulted in no full-text.
- 21 Unused full-text journals per target** – Per target, list the journals for which there are active full-text portfolios that did not appear in the statistics tables. Note that the RSI index must be built in order for this query to be used. For more information on building this index, refer to the **Rapid Service Indicator** section of the *SFX System Administration Guide*.

Click a query. The following window opens:

ExLibris SFX OpenURL Generator | Log Off

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

**Queries** | Scheduled Queries List

**Query 1 : Number of requests and clickthroughs per date.**

**Query parameters**

Total by: Day

**Dates to query**

Relative date range  Specific date range

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

**Filters**

Institute	Formats	Usergroup	Faculty	IP Address
DEFAULT AutQA	html			
<input type="checkbox"/> Exclude	<input type="checkbox"/> Exclude	<input type="checkbox"/> Exclude	<input type="checkbox"/> Exclude	<input type="checkbox"/> Exclude

**Output**

Format: HTML  
Delivery: Screen

**Submit Query** **Schedule**

Figure 119: Query Input



Fill in the fields according to the following table. Note that the options vary depending on the query selected:

Table: Statistic Queries

Table 27. Statistic Queries

Field	Description
<b>Total by:</b>	<ul style="list-style-type: none"> <li>■ For a total by time period: select a time period by which to total the results.</li> <li>■ For a total by Source: the result is displayed with a count per Source (this option is available for Query 5).</li> </ul>
<b>Show</b>	<p>Select one of the following:</p> <ul style="list-style-type: none"> <li>■ All</li> <li>■ Top 10</li> <li>■ Top 50</li> <li>■ Top 100</li> </ul>
<b>Group by Netmask:</b>	<p>This option is applicable only for query 18:</p> <ul style="list-style-type: none"> <li>■ 255.255.255.255 – Each IP address is listed separately in the query results.</li> <li>■ 255.255.255.0 – IP addresses that start with the same three values are grouped together in the query results. For example, 10.1.2.31 and 10.1.2.233 are grouped together as 10.1.2.0.</li> <li>■ 255.255.0.0 – IP addresses that start with the same two values are grouped together in the query results. For example, 10.1.2.31 and 10.1.3.233 are grouped together as 10.1.0.0.</li> </ul>
<b>Dates to Query</b>	<ul style="list-style-type: none"> <li>■ Relative Date Range – Select a time period relative to the date the report is run. Sunday is considered the first day of the week.</li> <li>■ Specific Date Range – Set a specific date range.</li> </ul>

Table 27. Statistic Queries

Field	Description
<p><b>Filters</b></p>	<p>Enter information to include the filter information in the results. Select <b>Exclude</b> to exclude the filter information from the results.</p> <ul style="list-style-type: none"> <li>■ Institute – If institutes have been specified in your instance, they are displayed in the institute filter drop-down list. <code>DEFAULT</code> is also listed, so that it is possible to include a filter on the <code>DEFAULT</code> institute as well. More information about institutes can be found in the <b>Institute Feature</b> section of the <i>SFX Advanced User's Guide</i>.</li> <li>■ Format – Select a format. HTML is the default. The list of formats corresponds to the <code>sfx.responsetype</code> information sent in the OpenURL. When no <code>sfx.responsetype</code> is sent in the OpenURL, the default (HTML) is used. The list of formats is taken from the data currently in the offline STAT tables, so if XML requests are not set in the instance, these formats are not displayed.</li> </ul> <p>Requests with the following <code>sfx.responsetype</code> are not stored in the SFX statistics tables (since they are not requests initiated by an end-user or performed on behalf of a specific end-user):</p> <ul style="list-style-type: none"> <li>■ <code>image-small</code></li> <li>■ <code>image-large</code></li> <li>■ <code>service_exist</code></li> </ul> <ul style="list-style-type: none"> <li>■ Usergroup – Enter a user group name. This information is set as part of the authentication process of MetaLib. Use a space to separate multiple user group names.</li> <li>■ Faculty – Enter a faculty name. This information is set as part of the authentication process of MetaLib. Use a space to separate multiple faculty names.</li> </ul>
<p><b>IP Address</b></p>	<p>Specify multiple IP addresses or ranges. Use an asterisk (*) as a wildcard.</p> <p>Use a space to separate multiple IP addresses or ranges.</p>

Table 27. Statistic Queries

Field	Description
Output	<ul style="list-style-type: none"> <li>■ Format – Select an output format: <ul style="list-style-type: none"> <li>■ HTML</li> <li>■ Plain text</li> </ul> </li> <li>■ Delivery – Select a delivery method <ul style="list-style-type: none"> <li>■ Screen</li> <li>■ E-mail</li> </ul> </li> </ul>

If you select e-mail for the output delivery method there is a 500 KB file size limit by default. If the file size exceeds this limit, the following message is displayed:

```
A query result was generated by SFX. However, the file was
too big to include as an attachment.
It can be retrieved on the server at:
/exlibris/sfx_ver/sfx4_1/<sfx_instance>/dbs/scratch/
stats_<instance>_<query>_<timestamp>.html
```

You can increase the file size limit by entering a new file size limit (in bytes) in the `file_size_limit` parameter of the following section of the `config/sfxctrl.config` file:

```
Section "stat"
    file_size_limit      ""
EndSection
```

#### NOTES:

- In query 11, it is possible to use truncation by using an asterisk (\*) when selecting or specifying sources.
  - Example 1 – To get information about the most popular journals in all EBSCO Host databases, select one of the EBSCO Host databases from the **Source** drop-down list. In the adjacent text box, the source `sid` value is displayed—for example, `EBSCO:aph`. Change this value to `EBSCO*` to make sure the query results in statistics data for all EBSCO Host databases.
  - Example 2 – To get information about the most popular journals in all sources that send a `sid` value, from the **Sources** drop-down list, select **ALL SOURCES**.

- Example 3 – To get information about the most popular journals in all sources that do not send a `sid` from the **Sources** drop-down list, select **NO SOURCE** or leave the text box empty.
  - Use query 19 to get information about the most popular journals, regardless of source information.
- 

## Scheduling Queries

To schedule a query to be run, click **Schedule**. The Scheduling Parameters dialog box opens:



Figure 120: Scheduling Parameters

Select a day, date, and time to run the query and enter an e-mail address to which to send the results. Click **Submit**. The query is run against the offline STAT tables. If you selected **Screen** as the output format, the results are displayed. If you selected **E-mail** as the output format, the results are e-mailed to you. By default there is a 500 KB file size limit for the e-mail output format. For information on changing the default, see the end of **Queries** on page 267.

---

### NOTE:

For query 20, the output format is slightly different. For each request in the result output, the OpenURL info is included in the `.txt` version of the statistics report.

In the HTML version, you can view the OpenURL by moving the mouse over, or clicking the small SFX button next to, each request. Clicking the SFX button submits the OpenURL and displays the SFX menu.

Note that for this query, a change was made in the SFX database STATISTICS tables to store OpenURL information. SFX statistical usage

information gathered before the database changes (for example, SFX version 3 statistics data) does not include OpenURL information. If this is the case, a red cross indicates that no OpenURL information is available for the request.

## Scheduled Queries List

To see a list of the scheduled queries, click **Scheduled Queries List**. The following window opens:

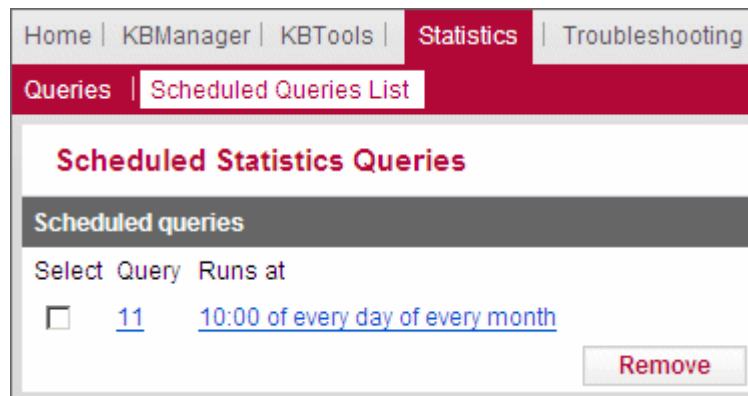


Figure 121: Scheduled Queries List

To view the details of the scheduled query, click the query.

## UStat

UStat, a hosted service provided by Ex Libris, analyzes usage data according to COUNTER (Counting Online Usage of Networked Electronic Resources) standards—the set of widely accepted standards and protocols for reporting usage statistics to libraries and information providers.

UStat supports the following:

- The upload of COUNTER statistics obtained by the library from information providers
- Cross-vendor platform reports
- Journal Report 1 (Number of Successful Full-Text Article Requests by Month and Journal) and Database Report 1 (Total Searches and Sessions by Month and Database), as defined in the COUNTER Code of Practice.
- NISO Standardized Usage Statistics Harvesting Initiative (SUSHI)

For more information on UStat, refer to the *UStat User's Guide*, available in the Documentation Center.



# 6

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## Troubleshooting

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### NOTES:

- For information on turning on Debugging and using the OpenURL Generator, refer to the *SFX Advanced User's Guide*.
  - To set up automated sign-in for the Contact Support option, see the **Configuring Contact Support** section of the *SFX Advanced User's Guide*.
- 

If you are having problems determining why you are not getting the results you expect from SFX, send the OpenURL of the search you performed to Ex Libris support Salesforce CRM via the Contact Support option in the SFXAdmin Center.

To ensure this option signs you in automatically to the Salesforce CRM, follow the instructions described in the **Configuring Contact Support** section of the *SFX Advanced User's Guide*.

The OpenURL can be found in the following places:

- If you use the OpenURL Generator form to create OpenURLs:
  - a Fill in the metadata of the search you are performing.
  - b Select **View OpenURL**.
  - c Click **Submit**.
  - d Copy the OpenURL from the next page and send it to your local Ex Libris support center along with a description of the problem.
- If you use a source database:
  - a From the SFX menu, view the HTML source by right-clicking and selecting **View Source**.
  - b Scroll down and copy the lines starting with '`sfx.openurl`' => and send them to your local Ex Libris support center along with a description of the problem.
  - c From the SFX menu, view the URL by right-clicking and selecting **View Page Info** (Firefox) or **Properties** (in Internet Explorer).

- d Copy and paste the information in the **Address** (URL) field, and send it to your local Ex Libris support center along with a description of the problem.

---

**NOTE:**

In some source databases, you can also find the OpenURL by right-clicking the SFX button.

---

- e Select **copy link location** in Netscape or **Copy Shortcut** in Internet Explorer and paste the link into an e-mail and send it to your local Ex Libris support center along with a description of the problem.



# Part III

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## Setup and Administration

This part contains the following sections:

- **Section 7:** **Additional KBTools** on page 275
- **Section 8:** **Configuration** on page 317
- **Section 9:** **Update Reports** on page 487



# 7

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## Additional KBTools

The Additional KB Tools section of the SFX Admin Center provides several additional tools that aid in the configuration of the SFX database.

This section includes:

- **Look-Up Tool** on page 275
- **TargetMatcher** on page 277
- **Localization Manager** on page 282
- **Category Tool** on page 292

## Look-Up Tool

The Look-Up tool allows you to search for information in the SFX database. It is most commonly used to look up an object's corresponding ISSN, LCCN, or ISBN, since SFX uses these values to activate and deactivate object portfolios in the database.

The following are the elements that can be used in the Look-Up tool:

- ISSN
- eISSN
- ISBN
- LCCN
- TITLE
- OBJECT number
- LOCAL
- OCLC number

To start the Look-Up tool, from the Additional KB Tools section of the Setup and Administration area, click **Look-Up Tool**. The following window opens:

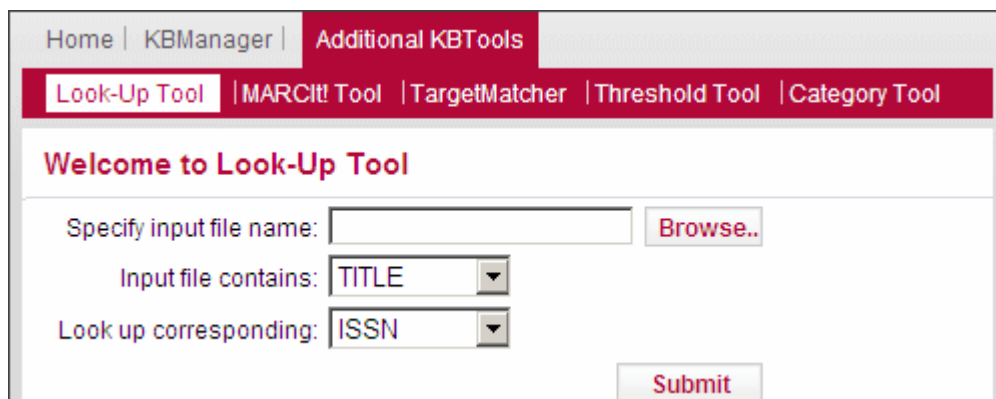


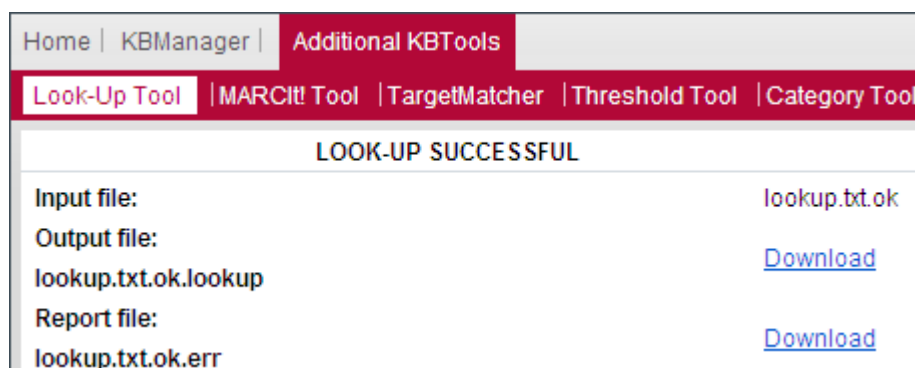
Figure 122: Look-Up Tool

### To look up data using the Look-Up tool:

- 1 Prepare the input file as a tab-delimited `.txt` file in Microsoft Excel. Place the values to be looked up in the first column.
- 2 Specify the input file by clicking the **Browse** button and selecting the input file. You can also manually place the file in the SFX scratch directory.
- 3 From the **Input File Contains** drop-down list, select the type of information in the input file.
- 4 From the **Look Up Corresponding** drop-down list, select the type of information you want to look up.
- 5 Click **Submit** to start the look-up process. If you selected a file in the **Specify Input File** field, the file is copied to the SFX scratch directory at the following location:

```
exlibris/sfx_ver/sfx4_1/<sfx_instance>/dbs/scratch
```

The following window opens after the look-up is completed.



LOOK-UP SUCCESSFUL	
Input file:	lookup.txt.ok
Output file:	<a href="#">Download</a>
lookup.txt.ok.lookup	
Report file:	<a href="#">Download</a>
lookup.txt.ok.err	

Figure 123: Look-Up Tool Report

An output file and a report file are generated. You can open them using Excel, Word, or a text editor. You can also choose to save them to your hard disk for later use. When saving the files, make sure the extension of the filename is `.txt`, to make it easier to open the file later.

The following is an example of an output file:

```
Transition                0041-1191
Victorian Studies         0042-5222
Theatre Topics
Theatre Journal           0192-2882,0003-0007
The Catholic Historical
Review
```

The output file contains the first column that was included in the original input file and a second column with the information found in the SFX database. In this example, the input file contained title information, and SFX looked up the corresponding ISSNs.

If no ISSN is found in the database, the second column remains blank. If more than one ISSN is found, the different ISSNs are listed, separated by a comma.

The following is an example of a report file:

```
The Catholic Historical    no ISSN found
Review
Theatre Topics            no ISSN found
Theatre Journal           multiple hits on ISSN
```

The report file contains information about items in the input file for which no corresponding value could be found in the SFX database (or for which multiple hits were found).

## TargetMatcher

This section includes the following:

- [TargetMatcher Overview](#) on page 278
- [Reading Files Generated in Report Mode](#) on page 280
- [Reading Files Generated in Activation Mode](#) on page 281

## TargetMatcher Overview

TargetMatcher is a tool that allows you to do the following:

- Create a report of active target services in the database
- Activate target services in the database

TargetMatcher can also be used to determine an object's target, which is necessary for batch activations using DataLoader.

TargetMatcher is useful for libraries that have a list of objects to which they subscribe and need to obtain a list of matching targets in order to use the DataLoader tool.

To start TargetMatcher, from the Additional KB Tools section of the Setup and Administration area, click **TargetMatcher**. The following window opens:

The screenshot shows the TargetMatcher web interface. At the top, there is a navigation bar with 'Home | KBManager | Additional KBTools' and a sub-bar with 'Look-Up Tool | MARCII! Tool | TargetMatcher | Threshold Tool | Category Tool'. The main content area is titled 'Welcome to TargetMatcher' and 'TargetMatcher'. It includes a 'Specify input file name:' field with a 'Browse..' button, a 'Check the input file against:' dropdown menu set to 'ACTIVE' with 'target services' to its right, a list of target services in a scrollable box (including AAA\_HIGH (ALL), AAA\_HIGH\_LCL-getAbstract, AAA\_HIGH\_LCL-getAlikeRecord, AAA\_HIGHER\_LCL-getAuthor, AA\_TEST (ALL), AA\_TEST\_LCL-getFullTxt, AA\_TEST\_LCL-getAbstract, ABC\_CLIO (ALL), ABC\_CLIO\_EBOOKS-getFullTxt, ABC\_CLIO\_HISTORY\_REFERENCE), two arrow buttons (>> and <<), a 'Select mode:' section with radio buttons for 'Report' (selected) and 'Activation', and a 'Select key:' section with radio buttons for 'ISSN' (selected), 'ISBN', 'LCCN', and 'OBJECT\_ID'. A 'Submit' button is at the bottom right.

Figure 124: TargetMatcher

### To create a report or activate targets:

- 1 Using Microsoft Excel, prepare a tab-delimited input file. In the first column of the file, list the primary key, which can be ISSN, ISBN, LCCN, or Object

ID numbers. In the second column you can list any information you want— for example, thresholds.

- 2 Click the **Browse** button and select the file or place it manually in the scratch directory of the SFX instance.
- 3 From the **Check the input file against** drop-down list, select the type of target against which to check the input file. The following options are available:
  - ACTIVE
  - INACTIVE
  - SPECIFIC
  - ALL
  - ACTIVE\_FULLLTX
  - INACTIVE\_FULLLTX
  - ALL\_FULLLTX

If you select **Specific**, select the targets against which you want to check the input file from the list and click **Add**.

- 4 From **Select Mode**, select **Report** to produce a report of items in the KnowledgeBase or **Activation** to activate the targets in the input file.
- 5 From **Select Key**, select the type of primary key in the input file.
- 6 Click **Submit** to start the TargetMatcher process.

## Reading Files Generated in Report Mode

If you select **Report**, a window opens that contains links to files that are generated by TargetMatcher.



Figure 125: Report Mode

To download the full report, click **Report** after **An analysis of the data file can be found in**. This report is also available in the scratch directory and is named `<name_of_your_original_file>.txt.ok.err`. The report file lists the items that are not found in the database. The following is an example of a report:

```
Report   NotFound   0269-3879   no target service found for 0269-3879
Report   NotFound   0424-7760   no target service found for 0424-7760
Report   NotFound   0890-2070   no target service found for 0890-2070
```

To download reports for each target and its target services, click **Download** next to the target for which you want to download the report. The report is a tab-delimited file that contains a list of objects of the portfolios that are found. The following is an example of a report:

```
0886-9383   Journal of Chemometrics
```



## Reading Files Generated in Activation Mode

If you select **Activation**, a window is displayed that contains links to files that are generated by TargetMatcher.

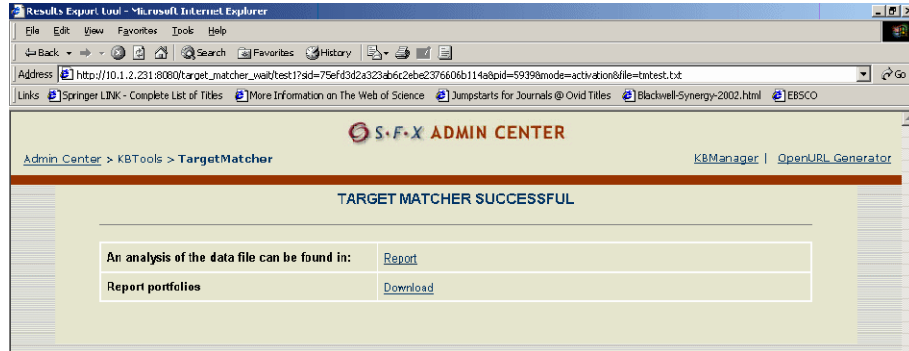


Figure 126: Activation Mode

To download a report of items that are not found in the database, click **Report** after **An analysis of the data file can be found in:**. This report is also available in the scratch directory and is named <name\_of\_your\_original\_file>.txt.ok.err. The following is an example of the report:

```
Report    NotFound    0269-3879    no target service found for
                                0269-3879

Report    NotFound    0424-7760    no target service found for
                                0424-7760

Report    NotFound    0890-2070    no target service found for
                                0890-2070
```

To download a report of the activated items in the database, as well as the targets and target services activated during the TargetMatcher process, click **Download** next to **Report portfolios**. This report is also available in the scratch directory and is named <name\_of\_your\_original\_file>.txt.ok.portfolios.out. The following is an example of the report:

```
Activated ELSEVIER getFullTxt 0894-3370
Activated ELSEVIER getFullTxt 0894-3370
Activated BIOONE getFullTxt 0886-9383
Activated CAMBRIDGE_UNIVERSITY_PRESS getFullTxt 0952-3499
Activated NEW getFullTxt 0002-8231

Activated 4 portfolios

Activated ELSEVIER getFullTxt
```

```
Activated BIOONE getFullTxt

Activated CAMBRIDGE_UNIVERSITY_PRESS getFullTxt

Activated NEW getFullTxt
```

## Localization Manager

This section includes the following:

- [Localization Manager Overview](#) on page 282
- [Target Services](#) on page 283
- [Object Portfolios](#) on page 285
- [Objects](#) on page 288
- [Reports](#) on page 289
- [Scheduled Tasks](#) on page 291
- [Localization Manager Report Examples](#) on page 291

### Localization Manager Overview

The purpose of this tool is to manage local information used in the SFX database. With this tool, it is possible to do the following:

- Compare and report local and global information
- Remove localizations
- Check the syntax of local object portfolio thresholds

This tool provides options to either report or report and remove the following localizations, for either global portfolios, global target services, or global objects:

- For target services and portfolios:
  - local threshold – compare with global threshold
  - local parser – compare with global parser
  - local parse\_param – compare with global parse\_param
  - local displayer (target service only) – compare with global parse\_param
  - proxy configuration
- For objects:

- local title – compare with global title
- local authors – compare with global authors
- local field

To start the Localization Manager tool, from the Additional KB Tools section of the Setup and Administration area, click **Localization Manager**.

The Localization Manager consists of the following tabs:

- **Target Services** on page 283
- **Object Portfolios** on page 285
- **Objects** on page 288
- **Reports** on page 289
- **Scheduled Tasks** on page 291

## Target Services

The Target Services tab allows you to locate localizations for target services.

ExLibris SFX

Home | KBManager | **Additional KBTools**

Look-Up Tool | TargetMatcher | Localization Manager | Category Tool

**Welcome to Localization Manager**

**Target Services** | Object Portfolios | Objects | Reports | Scheduled Tasks

Check localizations for **ACTIVE** target services **Submit**

aaaaalio\_LCL-getFullTxt  
ACADEMIC\_JOURNALS\_FREE-getFullTxt  
ACLS\_HUMANITIES\_EBOOK-getFullTxt  
ACTA\_PRESS-getFullTxt  
ADISONLINE-getAbstract  
ADISONLINE-getFullTxt  
AGECON\_FREE-getFullTxt  
AGZINES\_FREE-getFullTxt  
DAWSONERA-getFullTxt  
EBRARY\_ACADEMIC\_COMPLETE-getFullTxt

Select institute/s: **DEFAULT**

E-mail (Required):  ?

Select mode:

Report **ALL** localized fields

Remove **ALL** localized fields if content is identical to corresponding global field

Remove **ALL** localized fields

Schedule Localization Manager  0 0 ?

**Submit**

Figure 127: Target Services

### To locate localizations for target services:

- 1 Select one of the following from the drop-down list:
  - **All** – to locate localizations for all target services
  - **Active** – to locate localizations for active target services. A list of active target services is displayed.
  - **Specific** – to locate localizations for specific target services. A list of all target services is displayed.
- 2 If you select **Active** or **Specific**, a list of target services is displayed. From this list, select one or more target services that you want checked for localizations and click the right arrow. Click the double right arrow to move all of the target services displayed to the selection box.
- 3 If you have institutes defined, from the **Select Institute/s** drop-down list, select the institute that you want checked for localizations.

---

**NOTE:**

Only THRESHOLD and PROXY fields can be localized per institute. If other fields are selected for comparison, they are ignored.

---

- 4 In the **E-mail (Required)** field, enter an email address to which the report should be sent.
- 5 From the **Mode** field, select one of the following options:
  - Report localized fields
  - Remove localized fields if content is identical to corresponding global field
  - Remove localized fields
- 6 Select **All** to perform the action on all fields or select **Specific** and then select one or more of the following localized fields on which you want to perform the action:
  - THRESHOLD
  - PARSER
  - PARSE\_PARAM
  - DISPLAYER
  - PROXY
- 7 Select **Schedule Localization Manager** and select a date and time to schedule the Localization Manager to run.
- 8 Click **Submit**.

## Object Portfolios

The Object Portfolios tab allows you to locate localizations for object portfolios.

The screenshot displays the ExLibris SFX Localization Manager interface. At the top, the logo 'ExLibris SFX' is visible, followed by navigation links: 'Home | KBManager | Additional KBTools'. Below this is a red navigation bar with links: 'Look-Up Tool | TargetMatcher | Localization Manager | Category Tool'. The main heading is 'Welcome to Localization Manager'. A secondary navigation bar contains 'Target Services | Object Portfolios | Objects | Reports | Scheduled Tasks'. The 'Object Portfolios' section is active, showing a form with the following elements:

- A radio button selected for 'Check localized portfolios for' with a dropdown menu set to 'ACTIVE' and a 'Submit' button.
- A list of object portfolios in a scrollable area: 'aaaaalio\_LCL-getFullTxt', 'ACADEMIC\_JOURNALS\_FREE-getFullTxt', 'ACLS\_HUMANITIES\_EBOOK-getFullTxt', 'ACTA\_PRESS-getFullTxt', 'ADISONLINE-getAbstract', 'ADISONLINE-getFullTxt', 'AGECON\_FREE-getFullTxt', 'AGZINES\_FREE-getFullTxt', 'DAWSONERA-getFullTxt', and 'EBRARY\_ACADEMIC\_COMPLETE-getFullTxt'. Navigation arrows (>, <, >>, <<) are to the right.
- A 'Select institute/s:' dropdown menu set to 'DEFAULT'.
- 'Use input file' with a 'Choose File' button, 'No file chosen', a 'Clear' button, and 'which contains' dropdown set to 'ISSN'.
- 'E-mail (Required):' text input field with a '?' icon.
- 'Select mode:' section with three radio buttons:
  - Selected: 'Report' with a dropdown set to 'ALL' and the text 'localized fields'.
  - Unselected: 'Remove' with a dropdown set to 'ALL' and the text 'localized fields if content is identical to corresponding global field'.
  - Unselected: 'Remove' with a dropdown set to 'ALL' and the text 'localized fields'.
- 'Schedule Localization Manager' checkbox, a date picker, and two dropdown menus set to '0' with '?' icons.
- A radio button selected for 'Check syntax of local thresholds of ALL portfolios of the following Target service(s):'.
- A list of object portfolios in a scrollable area: 'aaaaalio\_LCL-getFullTxt', 'ABC\_CLIO\_EBOOKS-getFullTxt', 'ABC\_CLIO\_HISTORY\_REFERENCE\_ONLINE\_COMPLETE-getFullTxt', 'ACADEMIC\_JOURNALS\_FREE-getFullTxt', and 'ACLS\_HUMANITIES\_EBOOK-getFullTxt'.
- 'E-mail (Required):' text input field with a '?' icon.
- 'Schedule Localization Manager' checkbox, a date picker, and two dropdown menus set to '0' with '?' icons.
- A 'Submit' button at the bottom right.

Figure 128: Object Portfolios

### To locate localizations for object portfolios:

- 1 Select one of the following from the drop-down list:
  - **All** – to locate localizations for the object portfolios of all target services
  - **Active** – to locate localizations for the object portfolios of all active target services. A list of active object portfolios is displayed.
  - **Specific** – to locate localizations for the object portfolios of specific target services. A list of all object portfolios is displayed.

- 2 If you select **Active** or **Specific**, a list of object portfolios is displayed. From this list, select one or more target services for which you want to check the portfolio localizations and click the right arrow. Click the double right arrow to move all of the target services displayed to the selection box.
- 3 If you have institutes defined, from the **Select Institute/s** drop-down list, select the institute that you want checked for localizations.

---

**NOTE:**

Only the THRESHOLD field can be localized per institute. If other fields are selected for comparison, they are ignored.

---

- 4 You can limit the portfolios to be checked for localization by using an input file with objects:
  - a Click **Input file** and select the file.
  - b From the **which contains** drop-down list, select a primary key:
    - ISSN
    - ISBN
    - Object ID

---

**NOTE:**

Both ISBN10 and ISBN13 are allowed in the input file.

---

- 5 In the **E-mail (Required)** field, enter an email address to which the report should be sent.
- 6 From the **Mode** field, select one of the following options:
  - Report localized fields
  - Remove localized fields if content is identical to corresponding global field
  - Remove localized fields
- 7 Select **All** to perform the action on all fields or select **Specific** and then select one or more of the following localized fields on which you want to perform the action:
  - THRESHOLD
  - PARSER
  - PARSE\_PARAM
  - PROXY
- 8 Select **Schedule Localization Manager** and select a date and time to schedule the Localization Manager to run.

- 9 To check the threshold syntax of all object portfolios of a particular target service:
  - a Select **Check syntax of local thresholds of ALL portfolios of the following Target service(s)**.
  - b From the selection box, select target services.
  - c In the **E-mail (Required)** field, enter an email address to which the report should be sent.
  - d Select **Schedule Localization Manager** and select a date and time to schedule the Localization Manager to run.
- 10 Click **Submit**.

## Objects

The Objects tab allows you to locate localizations for objects.

ExLibris SFX

Home | KBManager | **Additional KBTools**

Look-Up Tool | TargetMatcher | Localization Manager | Category Tool

### Welcome to Localization Manager

Target Services | Object Portfolios | **Objects** | Reports | Scheduled Tasks

Check localizations for **SPECIFIC** objects

Use input file  No file chosen  which contains **ISSN**

E-mail (Required):  ?

Select mode:

Report **ALL** localized fields

Remove **ALL** localized fields if content is identical to corresponding global field

Remove **ALL** localized fields

Schedule Localization Manager    ?

Figure 129: Objects



### To locate localizations for objects:

- 1 Select one of the following from the drop-down list:
  - **All** – to locate localizations for all objects
  - **Specific** – to locate localizations for specific objects from an input file
- 2 To search a list of objects listed in an input file:
  - a Click **Input file** and select the file.
  - b From the **which contains** drop-down list, select a primary key:
    - ISSN
    - ISBN
    - Object ID
- 3 In the **E-mail (Required)** field, enter an email address to which the report should be sent.
- 4 From the **Mode** field, select one of the following options:
  - Report localized fields
  - Remove localized fields if content is identical to corresponding global field
  - Remove localized fields
- 5 Select **All** to perform the action on all fields or select **Specific** and then select one or more of the following localized fields on which you want to perform the action:
  - TITLE
  - AUTHOR
  - LOCAL
- 6 Select **Schedule Localization Manager** and select a date and time to schedule the Localization Manager to run.
- 7 Click **Submit**.

## Reports

The Reports tab allows you to view a list of previously run tasks and to download reports:

Date/Time	Report Type	Report Mode	Report Name	Log File
<input type="checkbox"/> 01/06/2015 at 20:00	Target Services	Report	<a href="#">report_localizations_ts_2015-06-01T20:00:04.txt</a>	<a href="#">localization.pl-2015-06-01T20:00:04.log</a>
<input type="checkbox"/> 22/05/2015 at 20:30	Check thresholds syntax		<a href="#">report_thresholds_op_2015-05-22T20:30:10.txt</a>	<a href="#">localization.pl-2015-05-22T20:30:10.log</a>
<input type="checkbox"/> 14/05/2015 at 17:21	Objects	Remove after compare	<a href="#">report_localizations_obj_2015-05-14T17:21:33.txt</a>	<a href="#">localization.pl-2015-05-14T17:21:33.log</a>
<input type="checkbox"/> 14/05/2015 at 17:20	Objects	Report	<a href="#">report_localizations_obj_2015-05-14T17:20:24.txt</a>	<a href="#">localization.pl-2015-05-14T17:20:24.log</a>
<input type="checkbox"/> 14/05/2015 at 16:44	Objects	Report	<a href="#">report_localizations_obj_2015-05-14T16:44:24.txt</a>	<a href="#">localization.pl-2015-05-14T16:44:24.log</a>
<input type="checkbox"/> 14/05/2015 at 11:28	Check thresholds syntax		<a href="#">report_thresholds_op_2015-05-14T11:28:05.txt</a>	<a href="#">localization.pl-2015-05-14T11:28:05.log</a>
<input type="checkbox"/> 14/05/2015 at 05:40	Object Portfolios	Remove after compare	<a href="#">report_localizations_op_2015-05-14T05:40:15.txt</a>	<a href="#">localization.pl-2015-05-14T05:40:15.log</a>
<input type="checkbox"/> 14/05/2015 at 05:38	Object Portfolios	Report	<a href="#">report_localizations_op_2015-05-14T05:38:38.txt</a>	<a href="#">localization.pl-2015-05-14T05:38:38.log</a>
<input type="checkbox"/> 14/05/2015 at 05:34	Object Portfolios	Remove - no compare	<a href="#">report_localizations_op_2015-05-14T05:34:01.txt</a>	<a href="#">localization.pl-2015-05-14T05:34:01.log</a>
<input type="checkbox"/> 14/05/2015 at 05:32	Object Portfolios	Remove after compare	<a href="#">report_localizations_op_2015-05-14T05:32:06.txt</a>	<a href="#">localization.pl-2015-05-14T05:32:06.log</a>
<input type="checkbox"/> 14/05/2015 at 05:26	Check thresholds syntax		<a href="#">report_thresholds_op_2015-05-14T05:26:24.txt</a>	<a href="#">localization.pl-2015-05-14T05:26:24.log</a>
<input type="checkbox"/> 14/05/2015 at 05:23	Check thresholds syntax		<a href="#">report_thresholds_op_2015-05-14T05:23:35.txt</a>	<a href="#">localization.pl-2015-05-14T05:23:35.log</a>
<input type="checkbox"/> 14/05/2015 at 05:13	Check thresholds syntax		<a href="#">report_thresholds_op_2015-05-14T05:13:18.txt</a>	<a href="#">localization.pl-2015-05-14T05:13:18.log</a>
<input type="checkbox"/> 14/05/2015 at 05:10	Object Portfolios	Remove after compare	<a href="#">report_localizations_op_2015-05-14T05:10:36.txt</a>	<a href="#">localization.pl-2015-05-14T05:10:36.log</a>
<input type="checkbox"/> 14/05/2015 at 05:02	Object Portfolios	Report	<a href="#">report_localizations_op_2015-05-14T05:02:27.txt</a>	<a href="#">localization.pl-2015-05-14T05:02:27.log</a>
<input type="checkbox"/> 14/05/2015 at 04:57	Target Services	Remove - no compare	<a href="#">report_localizations_ts_2015-05-14T04:57:25.txt</a>	<a href="#">localization.pl-2015-05-14T04:57:25.log</a>
<input type="checkbox"/> 11/05/2015 at 12:30	Object Portfolios	Report	<a href="#">report_localizations_op_2015-05-11T12:30:12.txt</a>	<a href="#">localization.pl-2015-05-11T12:30:12.log</a>
<input type="checkbox"/> 09/05/2015 at 22:42	Object Portfolios	Report	<a href="#">report_localizations_op_2015-05-09T22:42:34.txt</a>	<a href="#">localization.pl-2015-05-09T22:42:34.log</a>
<input type="checkbox"/> 08/05/2015 at 16:38	Object Portfolios	Report	<a href="#">report_localizations_op_2015-05-08T16:38:31.txt</a>	<a href="#">localization.pl-2015-05-08T16:38:31.log</a>
<input type="checkbox"/> 08/05/2015 at 16:13	Target Services	Report	<a href="#">report_localizations_ts_2015-05-08T16:13:16.txt</a>	<a href="#">localization.pl-2015-05-08T16:13:16.log</a>

Figure 130: Reports

The following information is displayed:

- **Date/Time** – the date and time that the report ran
- **Report Type** – the type of the report:
  - Target Services
  - Object Portfolios
  - Objects
- **Report Mode** – the mode of the report:
  - Report
  - Report after compare
  - Remove – no compare
- **Report Name** – the name of the report. Click the report name to view the report.
- **Log File** – the log file of the task. Click the log file to view the log file.

## Scheduled Tasks

The Scheduled Tasks tab allows you to view a list of all scheduled tasks. When a scheduled task is completed, it is removed from the list and the report results are displayed in the Reports tab.



Figure 131: Scheduled Tasks

To remove a scheduled task, click **Remove** for the task.

## Localization Manager Report Examples

The following are some examples of Localization Manager reports:

**TARGET\_SERVICE report – example where only parser and parse\_param fields are compared:**

RStatus	Compare Field	Target	Target Service	Global	Local
NOT IDENTICAL	PARSER	CAMBRIDGE_UP	getFullTxt	CLIP-OSO	Bulk-BULK
IDENTICAL	PARSE_PARAM	CAMBRIDGE_UP	getFullTxt	url=http://cco.cambridge.org&url2=http://dx.doi.org&url=http://cco.cambridge.org&url2=http://dx.doi.org	
NOT IDENTICAL	PARSER	CAMBRIDGE_UP	getAbstract	CLIP-OSO	CLIP-CLIP
NOT IDENTICAL	PARSE_PARAM	CAMBRIDGE_UP	getAbstract	url=http://cco.cambridge.org	url=http://cco.cambridge.org & url2=http://dx.doi.org

**PORTFOLIO report – example where only thresholds are compared:**

RStatus	Compare Field	Target	Target Services	Object	Title	Global	Local
NOT IDENTICAL	THRESHOLD	CAMBRIDGE_UP	getFullTxt	0003-0554	Cell Biology	\$obj->parsedDate[">="2 001,95,2]	\$obj->parsedDate[">="2 001,95,1]
IDENTICAL	THRESHOLD	CAMBRIDGE_UP	getFullTxt	0003-4800	Blood	\$obj->parsedDate[">="19 97,61,1]	\$obj->parsedDate[">="1 997,61,1]

**PORTFOLIO report – example where only thresholds are compared, and identical values are removed:**

RStatus	Compare Field	Target	Target Service	Object	Title	Global	Local
NOT IDENTICAL	THRESHOLD	CAMBRIDGE_UP	getFullTxt	0003-0554	Cell Biology	\$obj->parsedDate[">="2001,95,2]	\$obj->parsedDate[">="2001,95,1]
REMOVED-IDENTICAL	THRESHOLD	CAMBRIDGE_UP	getFullTxt	0003-4800	Blood	\$obj->parsedDate[">="1997,61,1]	\$obj->parsedDate[">="1997,61,1]
TOTAL: Removed 2 local threshold(s)							

**OBJECT report – example where only titles and authors are compared, and identical values are removed:**

RStatus	Compare Field	OBJECT_ID	Title	Global	Local
NOT IDENTICAL	TITLE	9856678221	Cell Biology	Cell Biology	Trends in cell biology
REMOVED-IDENTICAL	TITLE	9800678551	Nurture	Nurture	Nurture
REMOVED-IDENTICAL	AUTHOR	98006785211	Black book	Hopkins, A	Hopkins, A
REMOVED-IDENTICAL	AUTHOR	98006785211	Black book	Adams, John	Adams, John
TOTAL: Removed 1 local title(s), Removed 2 local author(s)					

**OBJECT report – example where local titles and authors are removed – no comparison:**

RStatus	Compare Field	OBJECT_ID	Title	Global	Local
REMOVED	TITLE	9800678551	Nurture	Nurture	Nurture
REMOVED	AUTHOR	98006785211	Black book	Hopkins, Anthony	Hopkins, A
REMOVED	AUTHOR	98006785211	Black book	Hopkins, Anthony	Adams, John
TOTAL: Removed 1 local title(s), Removed 2 local author(s)					

Figure 132: Localization Manager Report Examples

## Category Tool

You can use the Category tool to manage and configure categories in SFX. For a list of global categories, see [Global Categories](#) on page 307.

This section includes the following:

- [Setup](#) on page 292
- [Browse](#) on page 294
- [Export](#) on page 303
- [Loader](#) on page 304
- [Global Categories](#) on page 307

### Setup

To start the Category tool, from the Additional KB Tools section of the Setup and Administration area, click **Category Tool**. Click the **Setup** tab to configure the Category tool. The following window opens:

Home | KBManager | Additional KBTools

Look-Up Tool | MARCIt! Tool | TargetMatcher | Threshold Tool | Category Tool

## Category Tool

Setup | Browse | Export | Loader

**Set category mode**

Mode: (3) Translated global categories and global assignments

Submit

**Manipulate category data**

- Make a local copy of global categories
- Make a local copy of translated global categories
- Make a local copy of global category assignments
- Remove all translated categories
- Remove all local copy of categories
- Remove all local copy of category assignments

Submit

Figure 133: Setup

### Set Category Mode

You have the option of using the categories provided by Ex Libris in English, using the Ex Libris categories translated into a different language, or creating your own categories. Additionally, you can use the assignments of objects to specific categories provided by Ex Libris or create your own local assignments.

#### To set the category mode:

- 1 Select one of the following modes from the **Mode** drop-down list:
  - **(1) Global Categories and Assignments** – Ex Libris categories in original language (US ENG) and use Ex Libris assignments (default setting).
  - **(2) Global Categories and Local Assignments** – Ex Libris categories but make local category assignments. (Customers do not benefit from Ex Libris updates to the assignment table).

- **(3) Translated Global Categories and Global Assignments** – Ex Libris categories in a translated version (loaded by customer) and use Ex Libris assignments.
- **(4) Translated Global Categories and Local Assignments** – Translated Ex Libris categories but make local category assignments. (Customers do not benefit from Ex Libris updates to the assignment table).
- **(5) Local Categories and Local Assignments** – Local categories and local category assignments (both kept up-to-date by the customer).

2 Click **Submit**.

### **Manipulate Category Data**

You can make a copy of global categories and assignments as well as remove them.

#### **To manipulate category data:**

1 Select an option:

- Make a local copy of global categories
- Make a local copy of translated global categories
- Make a local copy of global category assignments
- Remove all translated categories
- Remove all local copy of categories
- Remove all local copy of category assignments

2 Click **Submit**.

### **Browse**

In this section, it is possible to view, add, edit, and delete categories, subcategories, and category assignments. Click the **Browse** tab. The following window opens:

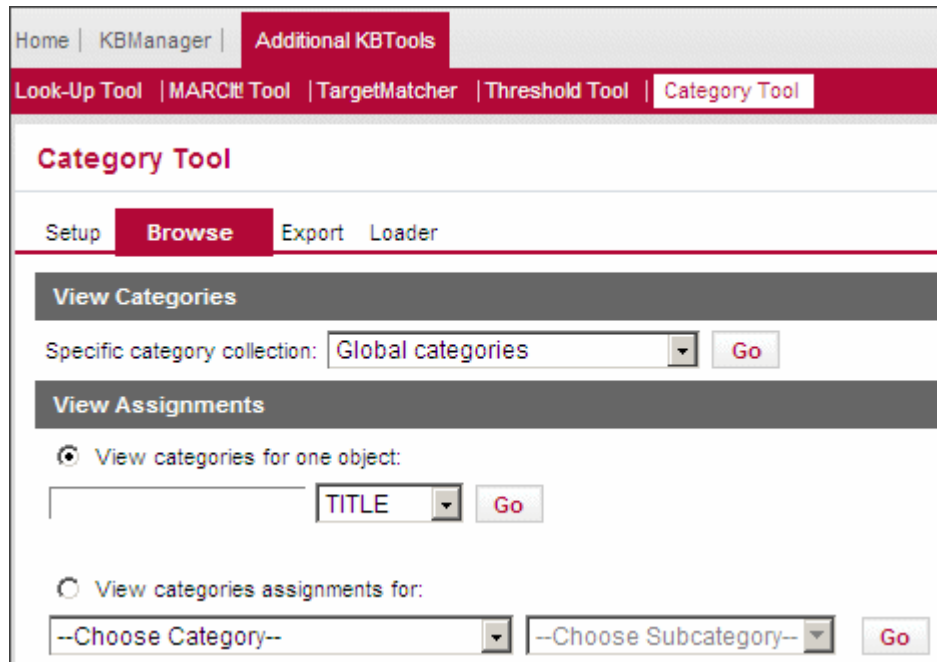


Figure 134: Browse

The following activities are available:

- [Viewing Global Categories](#) on page 295
- [Adding Categories](#) on page 299
- [Viewing Local Categories](#) on page 300
- [Editing Local Categories and Subcategories](#) on page 300
- [Adding Local Categories](#) on page 301
- [Viewing Categories for One Object](#) on page 301
- [Viewing Category Assignments](#) on page 303

### **Viewing Global Categories**

You can view a list of all of the categories in SFX.

#### **To view categories:**

- 1 Select one of the following types of categories from the **Specify Category Collection** drop-down list.
  - **Global categories**
  - **Global categories (translated)**
  - **Local categories**

- 2 Click **Go**. If you selected **Global categories**, the following dialog box opens:

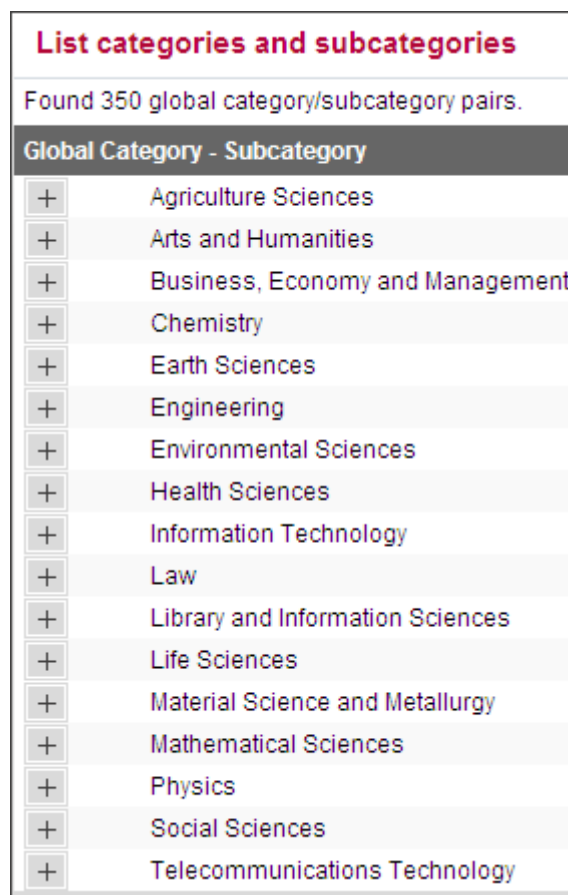


Figure 135: List of Global Categories and Sub-Categories

- 3 Click **+** to display a list of the subcategories of a category.



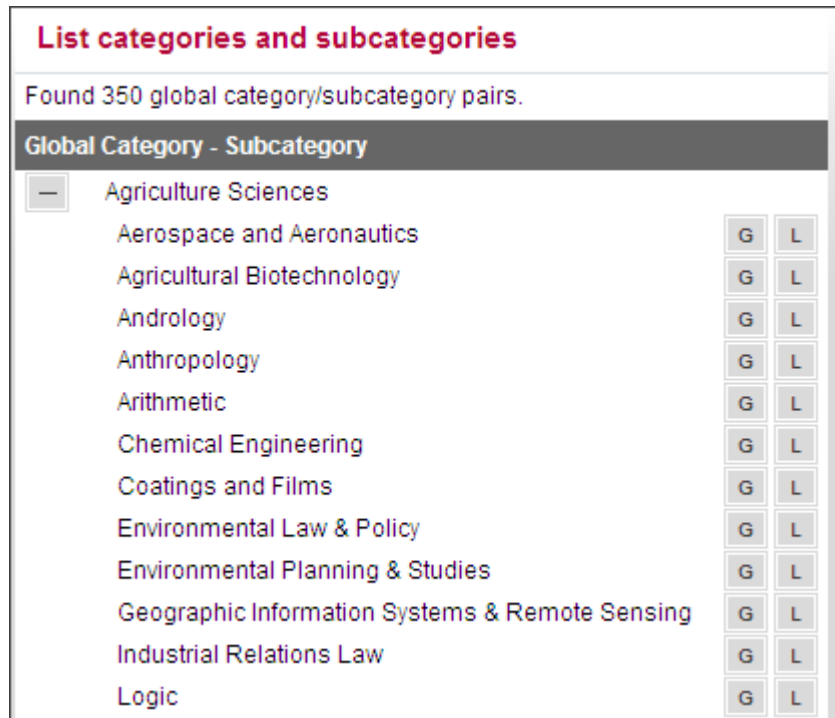


Figure 136: Subcategories

- 4 Click **G** to display the globally assigned objects of the subcategory. The following window appears:

<b>List Objects</b>	
Found 119 record(s) for the following query : Global category and global assignments : -	
<a href="#">&lt; Previous</a> <a href="#">Next &gt;</a>	
<b>1</b>	<b>111021052378050</b> <a href="#">Add</a> <a href="#">Remove</a>
<b>Title: Farm collector</b> <b>ISSN: 1522-3523</b>	
Global category: Agriculture Sciences - Agro Business, Economics and Policies	
Global category: Agriculture Sciences - Animal Husbandry, Livestock Management & Poultry Sciences	
Global category: Agriculture Sciences - Crops, Crop Production and Protection	
Global category: Agriculture Sciences - General and Others	
<b>2</b>	<b>111027544556000</b> <a href="#">Add</a> <a href="#">Remove</a>
<b>Title: Farmers Guardian</b> <b>ISSN: 0014-8423</b>	
Global category: Agriculture Sciences - Agro Business, Economics and Policies	
Global category: Agriculture Sciences - Animal Husbandry, Livestock Management & Poultry Sciences	
Global category: Agriculture Sciences - Crops, Crop Production and Protection	
Global category: Agriculture Sciences - General and Others	
<b>3</b>	<b>110978978736323</b> <a href="#">Add</a> <a href="#">Remove</a>
<b>Title: Farming news</b> <b>ISSN: 0265-1645</b>	
Global category: Agriculture Sciences - Agro Business, Economics and Policies	
Global category: Agriculture Sciences - Animal Husbandry, Livestock Management & Poultry Sciences	
Global category: Agriculture Sciences - Crops, Crop Production and Protection	
Global category: Agriculture Sciences - General and Others	
Global category: Agriculture Sciences - Horticulture and Plant Culture (including Arboriculture)	

Figure 137: Global Objects

- 5 Click **L** to display the locally assigned objects of the subcategory.

List Objects		
Found 119 record(s) for the following query : Global category and global assignments : -		
<a href="#">&lt; Previous</a> <a href="#">Next &gt;</a>		
1	111021052378050	<a href="#">Add</a> <a href="#">Remove</a>
Title: Farm collector <span style="float: right;">ISSN: 1522-3523</span>		
Global category: Agriculture Sciences - Agro Business, Economics and Policies		
Global category: Agriculture Sciences - Animal Husbandry, Livestock Management & Poultry Sciences		
Global category: Agriculture Sciences - Crops, Crop Production and Protection		
Global category: Agriculture Sciences - General and Others		
<input type="checkbox"/> Locally assigned to: Agriculture Sciences - Agro Business, Economics and Policies		
<input type="checkbox"/> Locally assigned to: Agriculture Sciences - Animal Husbandry, Livestock Management & Poultry Sciences		
<input type="checkbox"/> Locally assigned to: Agriculture Sciences - Crops, Crop Production and Protection		
<input type="checkbox"/> Locally assigned to: Agriculture Sciences - General and Others		
2	111027544556000	<a href="#">Add</a> <a href="#">Remove</a>
Title: Farmers Guardian <span style="float: right;">ISSN: 0014-8423</span>		
Global category: Agriculture Sciences - Agro Business, Economics and Policies		
Global category: Agriculture Sciences - Animal Husbandry, Livestock Management & Poultry Sciences		
Global category: Agriculture Sciences - Crops, Crop Production and Protection		
Global category: Agriculture Sciences - General and Others		
<input type="checkbox"/> Locally assigned to: Agriculture Sciences - Agro Business, Economics and Policies		
<input type="checkbox"/> Locally assigned to: Agriculture Sciences - Animal Husbandry, Livestock Management & Poultry Sciences		
<input type="checkbox"/> Locally assigned to: Agriculture Sciences - Crops, Crop Production and Protection		

Figure 138: Locally Assigned Objects

### Adding Categories

You can add a local category to the list.

#### To add a category:

- 1 Click **Add**. The following dialog box opens:

Select Category/Subcategory

Category: --Choose Category--

Subcategory: --Choose Subcategory--

Categories shown are specified by the current category mode.

Figure 139: Add Category

- 2 Select a category and subcategory.
- 3 Click **Submit**.

### Viewing Local Categories

If you select local categories from the **Specify Category Collection** drop-down list, the following dialog box opens:

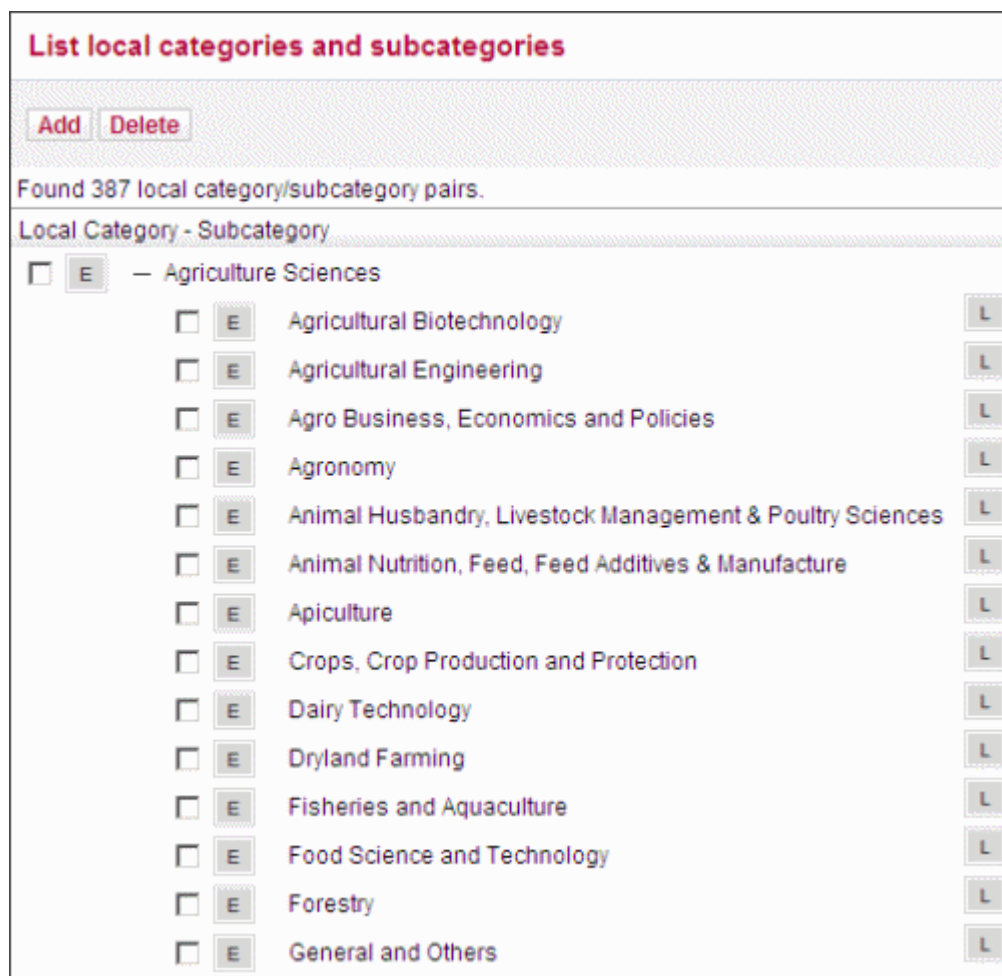


Figure 140: Local Categories

### Editing Local Categories and Subcategories

You can edit local categories and subcategories.

### To edit a category or subcategory:

- 1 Click **E**. The following dialog box opens:

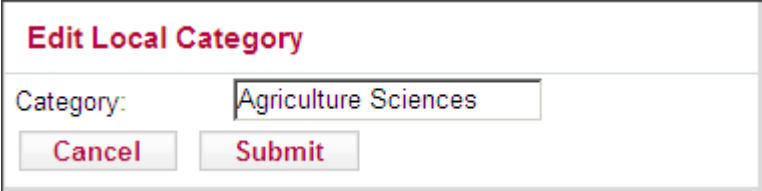


Figure 141: Edit Local Category

- 2 Edit the category or subcategory.
- 3 Click **Submit**.

### Adding Local Categories

You can add a local category or subcategory.

### To add a local category or subcategory:

- 1 Click **Add**. The following dialog box opens:

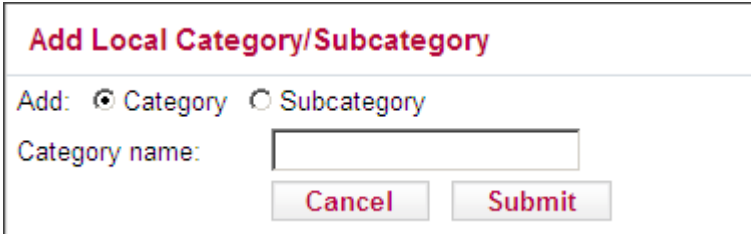


Figure 142: Add Local Category/Subcategory

- 2 Select **Category** or **Subcategory**
- 3 Type a name for the category or subcategory.
- 4 Click **Submit**.

### Viewing Categories for One Object

You can view the categories for one object.

**To view categories for one object:**

- 1 Select **View categories for one object**.
- 1 Type the object information in the text box.
- 2 From the drop-down list, select one of the following:
  - **TITLE**
  - **ISSN**
  - **ISBN**
  - **LCCN**
  - **OBJECT\_ID**
- 3 Click **Go**.

---

**NOTE:**

Left, right, and middle truncation (\*) can be used for TITLE searches.

---

The following information is displayed:

- Title
- ISSN
- Global categories
- Global translated categories
- Local categories
- Global assignments
- Local assignments

For example:

List Objects		
Found 1 record(s) for the following query : ISSN_ID: 0000-0019		
< Previous Next >		
1	954921332001	<a href="#">Add</a> <a href="#">Remove</a>
Title: Der woechentliche Herausgeber		ISSN: 0000-0019
Global category: Arts and Humanities - Literature		
<input type="checkbox"/>	Locally assigned to: Arts and Humanities - Literature	

Figure 143: List Objects for One Object

Both the active and inactive categories are displayed, but the inactive ones are grayed out.

## Viewing Category Assignments

You can view the objects assigned to a category.

### To view categories assignments:

- 1 Select **View category assignments for**.
- 1 From the **Choose Category** drop-down list, select a category.
- 2 From the **Choose Subcategory** drop-down list, select a subcategory.
- 3 Click **Go**.

The following information is displayed:

- Title
- ISSN
- Global categories
- Global translated categories
- Local categories
- Global assignments
- Local assignments

## Export

Click the **Export** tab to export categories. The following window opens:

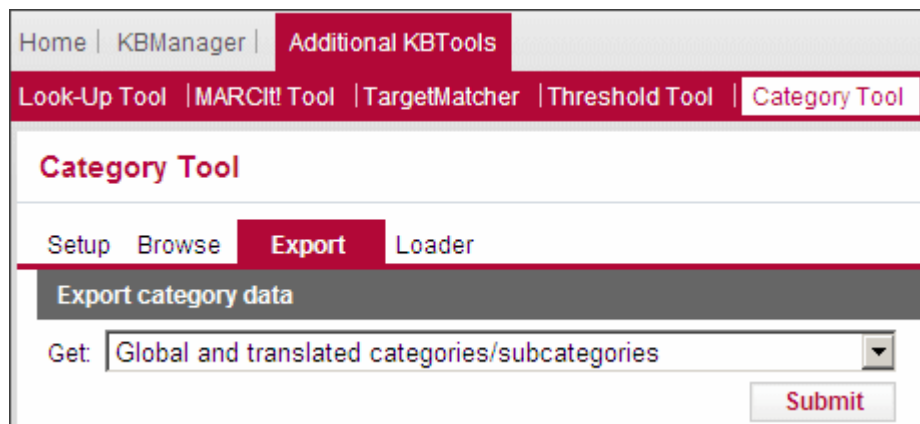


Figure 144: Export

### To export categories:

- 1 From the **Get** drop-down list, select an option:
  - **Export Ex Libris categories and translated Ex Libris categories**

- Report Ex Libris categories where no translated categories exist
  - Export all local categories without assignments
  - Export all local categories with assigned objects (ISSN, etc)
  - Export count total assigned journals per local category
  - Export all category information for list of objects (using input file)
- 2 Click **Submit**. The following window opens:

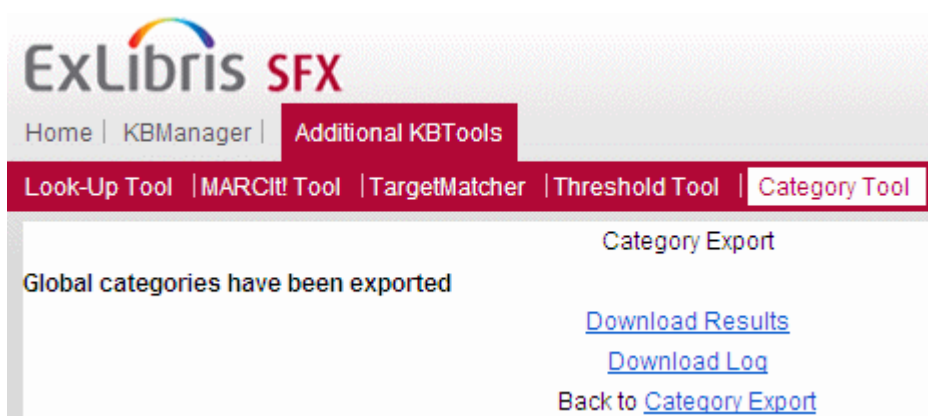


Figure 145: Category Export

- 3 To download the results, click **Download Results**.
- 4 To download the log file, click **Download Log**.

## Loader

Click **Loader** to load categories in the SFX KnowledgeBase. The window opens:



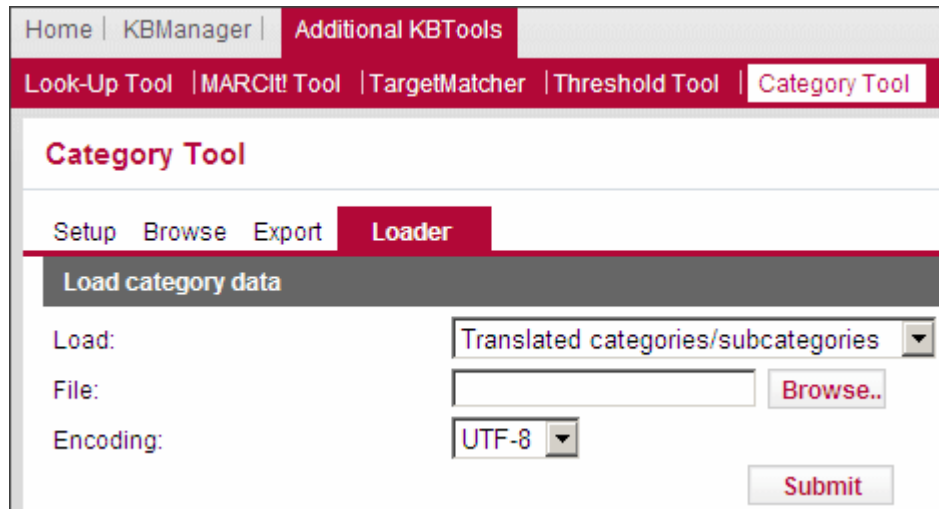


Figure 146: Loader

#### To load category data:

- 1 From the **Load** drop-down list, select the type of data you want to load. For more information, see **Load Options** on page 305.
- 2 In the **File** field, click **Browse** and select the file with the data you want to load.
- 3 From the **Encoding** drop-down list, select an encoding option.
- 4 Select any additional options available.
- 5 Click **Submit**.

The following rules apply to loading categories into the SFX KnowledgeBase:

- Categories cannot be loaded without subcategories.
- Journals can be loaded only to a category/subcategory pair (not to categories only or subcategories only).

#### Load Options

- **Translated categories/subcategories** – The data in the input file overwrites the old translated category information. The following is the input file format:

```
Ex Libris CATEGORY <tab> Translated CATEGORY <tab> Ex Libris  
SUBCATEGORY <tab> Translated SUBCATEGORY
```

- **Local categories/subcategories** – The following is the input file format:

```
LOCAL CATEGORY <tab> LOCAL SUBCATEGORY
```

Options:

- **Add new** – Adds new categories/subcategories and leaves existing items in the database—but not in the input file—untouched.
- **Add new + remove if not in input file** – Adds new categories/subcategories and removes existing items in the database but not in the input file.
- **Update existing** – The data in the input file overwrites the old information. The input file for this option requires the following format:

```
LOCAL CATEGORY ID <tab> LOCAL CATEGORY NAME <tab> LOCAL  
SUBCATEGORY ID <tab> LOCAL SUBCATEGORY NAME
```

- **Assignment of global categories** – The following is the input file format:

```
Primary key <tab> Ex Libris CATEGORY <tab> Ex Libris  
SUBCATEGORY
```

The primary key can be: ISSN, ISBN, LCCN, OBJECT (only one primary key per input file)

Options:

- **Add new** – Adds new categories/subcategories assignments and leaves existing items in the database—but not in the input file—untouched.
- **Replace** – The data in the input file overwrites the old information.
- **Assignment of local categories/subcategories** – The following is the input file format:

```
Primary key <tab> LOCAL CATEGORY <tab> LOCAL SUBCATEGORY
```

The primary key can be: ISSN, ISBN, LCCN, OBJECT (only one primary key per input file)

Options:

- **Add new** – Adds new categories/subcategories assignments and leaves existing items in the database—but not in the input file—untouched.
- **Replace** – The data in the input file overwrites the old information.

## Global Categories

### Chemistry

Analytical Chemistry	Nuclear Chemistry
Applied Chemistry	Organic Chemistry
Biochemistry	Petroleum
Chemical Engineering	Pharmaceutical Chemistry
Clinical Chemistry	Physical Chemistry
Crystallography	Polymers and Plastics
Electrochemistry	Radiation Chemistry
Environmental Chemistry	Toxicology
Inorganic Chemistry	General and Others
Kinetics	Synthesis
Medicinal Chemistry	

### Earth Sciences

Cartography	Marine Geology and Oceanography
Engineering Geology	Meteorology
Environmental Geology	Mineralogy
Extraterrestrial Geology	Paleontology
Geochemistry	Petrology
Geographic Information Systems & Remote Sensing	Tectonics, Seismology & Volcanology
Geography	General and Others

Geology	Stratigraphy
Geophysics	Energy Minerals
Hydrology	

**Environmental Sciences**

Atmospheric Science	Global Warming
Biodiversity	Natural Disasters & Industrial Accidents
Biomass Energy & Biofuels	Occupational Hazards & Health
Conservation	Pollution (Air, Noise, Soil and Water) & Control
Desert Ecology & Desertification	Radioactivity & nuclear fallout
Ecosystems & Ecology	Sustainable Development
Ecotoxicology	Waste management and Recycling
Environmental Engineering	General and Others
Environmental laws	Energy Conservation & Alternate Energy Sources
Environmental Planning & Studies	Hazardous Substance Handling, Management & Disposal

**Environmental Sciences**

**Life Sciences**

Ornithology
Toxicology
Virology
Zoology
General and Others
Morphology
Paleontology
Taxonomy & Systematics
Evolutionary Studies
Genomics

Genetics	Computational Biosciences
Immunology	Ethology
Limnology	Animal Physiology
MicroandMolecularBiology	Metabolism

**Mathematical Sciences**

Algebra	Numerical Analysis
Applied Mathematics	Probability
Arithmetic	Set Theory
Calculus	Statistics
Game Theory	Topology
Geometry	General & Others or All
Graph Theory	Algorithms
Group theory	Stochastic Computation
Logic	Combinatorics
Mathematical Analysis & Logic	Complex Analysis
Mathematical Physics	Algebraic Geometry
Number Theory	Differential Geometry

**Physics**

Acoustics	Particle Physics
Applied Physics	Plasma Physics
Astronomy	Mechanics
Astrophysics	Radiation
Condensed Matter Physics	Relativity
Cryogenics	Solid State Physics
Energy	Thermodynamics and Heat Transfer

Magnetism

Optics & Opto Electronics

Nuclear Physics

Ultrasonic

General and Others

Atmospheric Physics

### **Engineering**

Aerospace and Aeronautics

Agricultural Engineering

Architecture

Automobile and Transportation

Biomedical Engineering

Biotechnology

Chemical Engineering

Civil Engineering

Control Engineering

Cryotechnology

Dairy Technology

Electrical Engineering

Electronics

Energy Engineering

Environmental Engineering

Ergonomics

Fluid Engineering

Food Science and Technology

Fuel Technology

Industrial Engineering

Instrumentation

Marine Engineering

Mechanical Engineering

Metrology

Mining Engineering

Nuclear Engineering

Petroleum Engineering

Pharmaceutical Technology

Polymer Technology

Quality Engineering

Textile Engineering

General and Others

Production Technology

Satellites, Space Probes & Technology

Printing Technology

Fire Fighting and Safety Engineering

### **Information Technology**

Artificial Intelligence

Computer Science (Hardware & Networks)

Healthcare Database & Medical Informatics

Mobile Computing

Cybernetics	Computer Architecture, Languages and Compilers
Information Science and Systems	Information Extraction, Retrieval and Filtering
Internet	Data Storage and Data Mining
Multimedia	Graphics
Robotics	Computer Security, Confidentiality
Software Engineering	Modelling & Simulation
General and Others	Computational Biosciences
Banking Insurance Financial Systems	Neural Networks
Automation	Web Development
Embedded Systems	Computer Aided Design & Production Control
Database Design & Management	

### **Material Science and Metallurgy**

Biomaterials	Physical Metallurgy
Ceramics	Rubber Technology
Coatings and Films	Super Conductors
Composites	Treatment & Finishing
Corrosion	Textile materials
Extractive Metallurgy	Wood, Paper & Cellulosics
Melting, Coating, Powder Metallurgy	Working, Forming, Machining & Joining
Metals, Minerals, Ores & Alloys	General and Others
Packaging Materials & Technology	Nanomaterials

### **Telecommunications Technology**

Cables & Optical Fibres	Wireless Communications
-------------------------	-------------------------

Communication Networks & Technology	General and Others
Digital Signal Processing	Telemedicine
Image Processing & Television Technology	

**Business, Economy and Management**

Accounting and Auditing	Trade and Commerce
Actuarial Science, Insurance and Risk Management	General and Others
Banking and Investment	Organizational Communication, Business Writing
Business Management	International Business & Transnational Corporations
E-Commerce	Strategic Management & Business Policy
Economics	Organizational change and Development
Finance	Organizational Psychology
Marketing and Sales	Quality Management
Personnel Management & Training	Operations Research
Projects and Consultancies	Multimodal Transport & Logistics
Public Relations	Material & Supply Chain Management
Stocks and Shares	

**Library and Information Sciences**

Abstracting and Indexing	Library Automation
Acquisition	Library Networks
Cataloguing	Library Management
Classification	Serials Control
Digital Libraries	General and Others
Information Sources, Services and Retrieval	Archives & Preservation
Librarianship and Libraries	



**Social Sciences**

Anthropology	Regional and International Studies
Archaeology	Rehabilitation
Behavioral Science (Psychology) and Counselling	Sociology
Communities and Urban Planning	General and Others
Demographic Studies	Gender Studies
Foreign Policy, Defence and Internal Security	Museums & Heritage Organizations
Journalism, Mass Communication, Media & Publishing	Developmental Issues & Socioeconomic Studies
Political Science	Disability Studies & Assistance
Public Policy & Administration	Community Based Awareness and Relief Service

**Law**

Banking Law	Investment Laws
Constitution and Judicial System	Corporate laws
Crime, Criminology and Law Enforcement	Policies
Environmental Law & Policy	Regional and International Law
Foreign Trade & Commercial Transactions	Taxation Laws
Industrial Relations Law	General and Others
Insurance Law	Domicile and Immigration Laws
Intellectual Property	Arbitration, Education & Training

### **Arts and Humanities**

Architecture, Fine and Decorative Arts	Philosophy
Fashion & Entertainment	Religion
History	Society and Culture
Human Rights, Women's Studies & Child Welfare	General and Others
Language & Linguistics	Education & Careers
Literature	Current Events & News
Performing Arts, Travel and Leisure	

### **Agriculture Sciences**

Agricultural Biotechnology	Horticulture and Plant Culture (including Arboriculture)
Agricultural Engineering	Organic Farming, Rural Development, Sustainable Agriculture
Agro Business, Economics and Policies	Pests, Pest Control & Integrated Pest Management
Agronomy	Soil Chemistry, Microbiology, Fertility & Fertilizers
Animal Husbandry, Livestock Management & Poultry Sciences	Veterinary Science
Apiculture	Water and Water Resources
Crops, Crop Production and Protection	General and Others
Dairy Technology	Plant Pathology
Dryland Farming	Plant Breeding

Fisheries and Aquaculture	Post Harvesting Operations and Storage
Food Science and Technology	Seed Technology & Propagation
Forestry	Animal Nutrition, Feed, Feed Additives & Manufacture

**Health Sciences**

Allergy	Obstetrics and Gynecology
Alternative Medicine	Oncology
Anesthesiology	Ophthalmology
Anatomy	Orthopedics
Cardiology	Pediatrics
Clinical Medicine	Pathology
Dentistry	Pharmacy and Pharmacology
Dermatology	Physiology
Diabetes and Hypertension	Psychiatry & Psychology
Diseases	Public health
Emergency Medicine and Critical Care	Radiology
Endocrinology	Reproduction & Reproductive Medicine
ENT	Rheumatology
Forensic Science	Sports medicine
Gastroenterology	Surgery
Genetics	Therapeutics
Geriatrics	Urology and Nephrology
Hematology	Veterinary Science
Hepatology	General and Others
Histology	Diagnostics
Immunology	Medical Education, Training & Research
Legal Medicine	Physiotherapy

Venereology	Andrology
Medical Informatics	Tuberculosis
Medical Specialties	Embryology
Morphology	HIV & AIDS
Neurology	Preventive Medicine
Nuclear Medicine	Family Medicine
Nursing	Cerebrovascular Diseases & Strok
Nutrition and Dietetics	

# 8

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## Configuration

The Configuration section of the SFX Admin Center describes how to configure the display of the SFX A-Z List and the SFX menu.

This section includes:

- [Journal Search and A-Z List](#) on page 317
- [eBook Search](#) on page 381
- [Menu Configuration](#) on page 412
- [Translations and Display](#) on page 481

## Journal Search and A-Z List

This section includes:

- [Journal Search and A-Z List Overview](#) on page 318
- [Journal Search](#) on page 318
- [Accessing the Journal Search](#) on page 318
- [Searching with the Journal Search](#) on page 319
- [Journal Search Result Display](#) on page 323
- [Multi-Language Journal Search](#) on page 327
- [Journal Search Related Objects](#) on page 330
- [AJAX Auto-Complete for the Journal Search](#) on page 332
- [Building the Journal Search](#) on page 333
- [SFX A-Z List](#) on page 334
- [Accessing the A-Z List](#) on page 334
- [Searching with the A-Z List](#) on page 335
- [A-Z Result Display](#) on page 341

- [Multi-Language A-Z List](#) on page 343
- [Related Objects](#) on page 346
- [AJAX Auto-Complete](#) on page 349
- [Building the A-Z List](#) on page 351
- [Configuring the Journal Search, A-Z List, and Fetch Item](#) on page 352
- [Configuring the Journal Search](#) on page 352
- [Journals Quick Search](#) on page 362
- [Configuring the Old A-Z List](#) on page 364
- [A-Z List Custom Profiles](#) on page 377
- [A-Z List for Mobile Devices](#) on page 379

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**NOTE:**

For advanced information on the A-Z List, refer to the *SFX Advanced User's Guide*.

---

## Journal Search and A-Z List Overview

The A-Z list is a searchable list of all journals to which your library subscribes. The list of journals is available for each SFX instance, based on activation and localization performed in the SFX KnowledgeBase.

There are two versions of the A-Z list - the old version and the new Journal Search. It is recommended that you use the new Journal Search version. For information on the old version, see [SFX A-Z List](#) on page 334.

---

**NOTES:**

- Click the [Cookie Policy](#) link at the bottom of the A-Z List to display a description of the SFX Privacy Policy and how Ex Libris uses cookies.
  - Local journal objects and local title overrides for journals are not included in the local instance A-Z eJournal list if they are created in the shared instance as part of a set-up of local/shared instances in consortia model 3.
- 

## Journal Search

The following sections describe the SFX Journal Search feature.

### Accessing the Journal Search

To access the Journal Search, type the following URL in your Web browser:

[http://<sfx\\_server>:<port>/<instance>/JournalSearch](http://<sfx_server>:<port>/<instance>/JournalSearch)

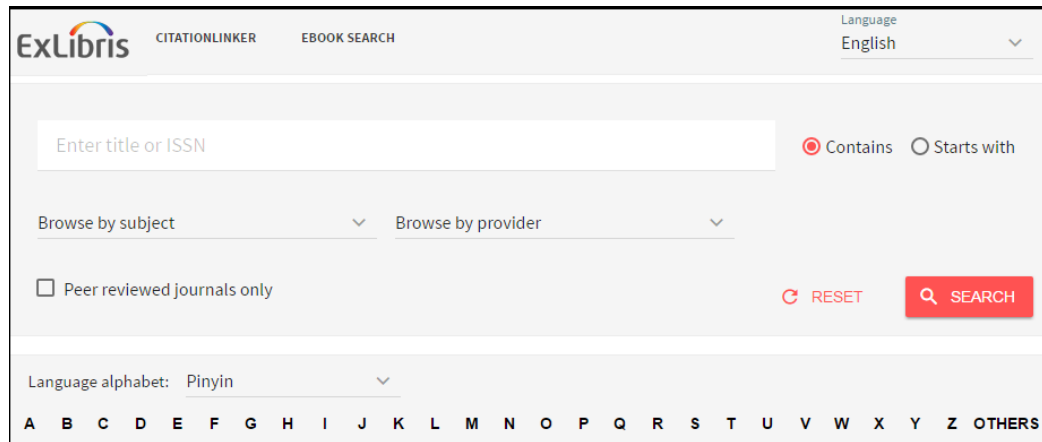


Figure 147: Journal Search

The following parameters can be added to the Journal Search URL:

- `lang=<3digit_language_code>`

This parameter is used to present the appropriate language Journal Search. The accepted three-digit language codes are all ISO 639-2 three-letter codes (plus chi-simplified and chi-traditional). Information and a list of codes can be found at: <http://www.loc.gov/standards/iso639-2/>

For example: <http://demo.exlibrisgroup.com:3210/demo/journalsearch/?lang=eng>

- `embedded=<ExL_product>`

This parameter is used to embed the SFX Journal Search in the MetaLib iframe. Set the value of `<ExL_product>` to be ML. When included in the URL, SFX removes the top banner, title, and language bar from the SFX Journal Search. These elements of the Journal Search are not displayed, since they are provided by the MetaLib interface in which the SFX Journal Search is embedded.

For example: <http://demo.exlibrisgroup.com:3210/demo/journalsearch/?embedded=ML>

---

**NOTE:**

Click the **Cookie Policy** link at the bottom of the Journal Search to display a description of the SFX Privacy Policy and how Ex Libris uses cookies.

---

## Searching with the Journal Search

The Journal Search consists of the following sections:

- **Searching by Title or ISSN** on page 320 – Allows browsing and searching of journal titles

- **Kanji Character Variant Searching** on page 338 – Configure title searching for variant Kanji characters
- **Browse by Subject** on page 321 – Allows browsing of journals by category
- **Browse by Provider** on page 322 – Allows browsing of journals by provider
- **CitationLinker** on page 323 – Form to fill in journal citation information in order to get a corresponding SFX menu. It can be used if the user found citation information prior to accessing the Journal Search.

### **Searching by Title or ISSN**

Enter a title or ISSN in the text box. The Journal Search supports two types of searches:

- **Contains** – The result set includes all journal titles that contain the search terms entered. When multiple search terms are used, double quotes can be used to indicate a phrase search. In a phrase search, the order and adjacency of the search terms are taken into account when performing the search.

When no double quotes are used to indicate a phrase search, all search terms must exist in the main or abbreviated titles of the journals displayed, but adjacency and order of words are not taken into account.

For example, if you search for **university journal**, the following two results are displayed:

```
University journal of excellence in research  
Research journal from Columbia University
```

If you search for “**university journal**” only the first journal is displayed.

- **Starts with** – Displays a limited list of Journal Search journal titles that start with the search term used in any of the title fields of the journal. The result count number in the search set is the number of journals that start with the search term used.
- **Exact** – The result set includes all journal titles that match the search term exactly. The Exact search option is not shown when the **AJAX auto-complete** option is enabled, as its functionality is replaced by clicking a title within the auto-complete list. More information on AJAX can be found in **AJAX Auto-Complete** on page 349.

The following is an example of a title search result:



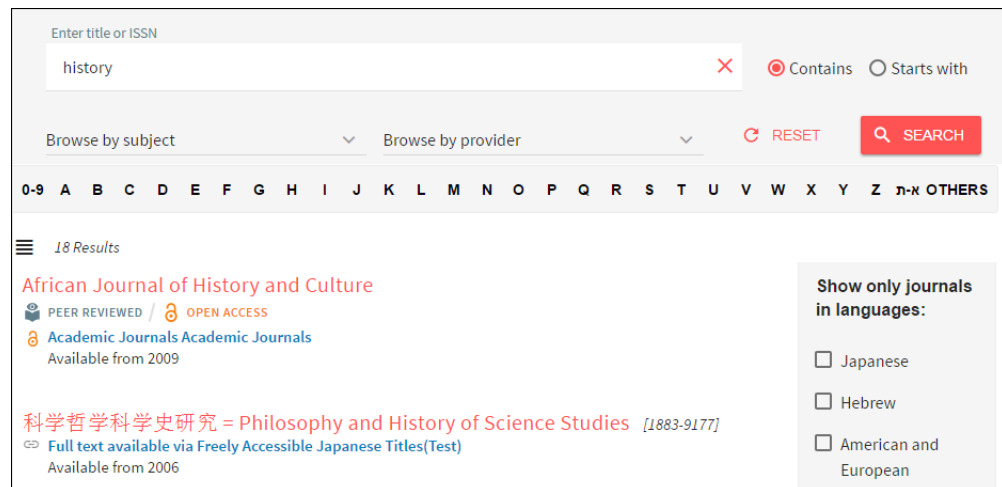


Figure 148: Title Search

If the Journal Search result includes journals with titles in languages with different writing systems (for example English and Hebrew), an option to filter by language is displayed on the right side of the result list.

For more information on configuring the language check boxes, see [Language](#) on page 408.

### **Browse by Subject**

Select a value from the Browse by Subject drop-down list and click **Search** to see results according to the subject you selected:

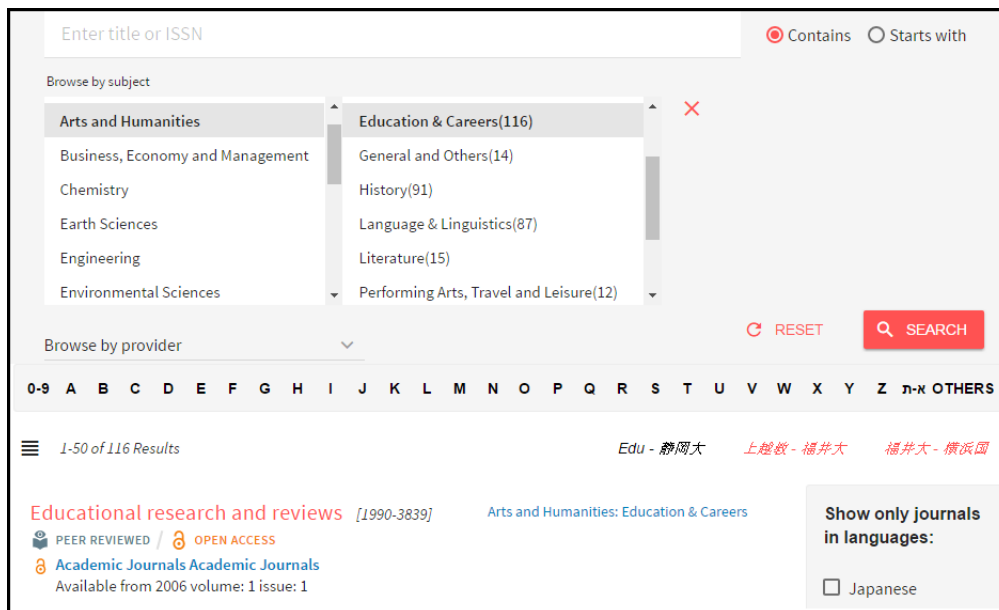


Figure 149: Browse by Subject

### Browse by Provider

Select a value from the **Browse by Provider** drop-down list and click **Search** to see results according to the content provider you selected:

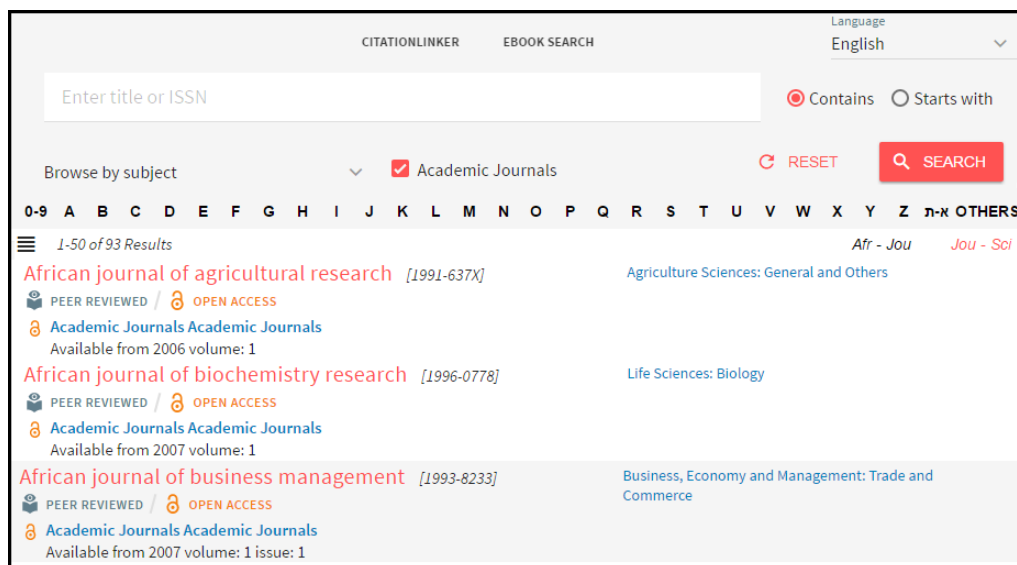


Figure 150: Browse by Provider

## CitationLinker

Click **CitationLinker** to manually create an OpenURL that is then sent to the SFX server. The following is displayed:



The screenshot shows the CitationLinker interface. At the top right is the ExLibris SFX logo. The main heading is 'CitationLinker'. Below the heading are three tabs: 'Article', 'Journal', and 'Book'. The 'Article' tab is selected. The form contains the following fields:

- article title:
- journal title:  Contains
- date:
- volume:  issue:
- start page:  end page:
- issn:  DOI:
- pmid:
- author: last name  first name  initials

At the bottom right of the form are 'Clear' and 'GO' buttons.

Figure 151: CitationLinker

For more information, see [CitationLinker and Fetch Item](#) on page 511.

## Journal Search Result Display

After you perform a search, the Journal Search displays the results in Table view or Detail view. For information on determining which view is displayed by default, see [Search/Results](#) on page 359.

## Table View

The following is an example of the Journal Search display in Table view:

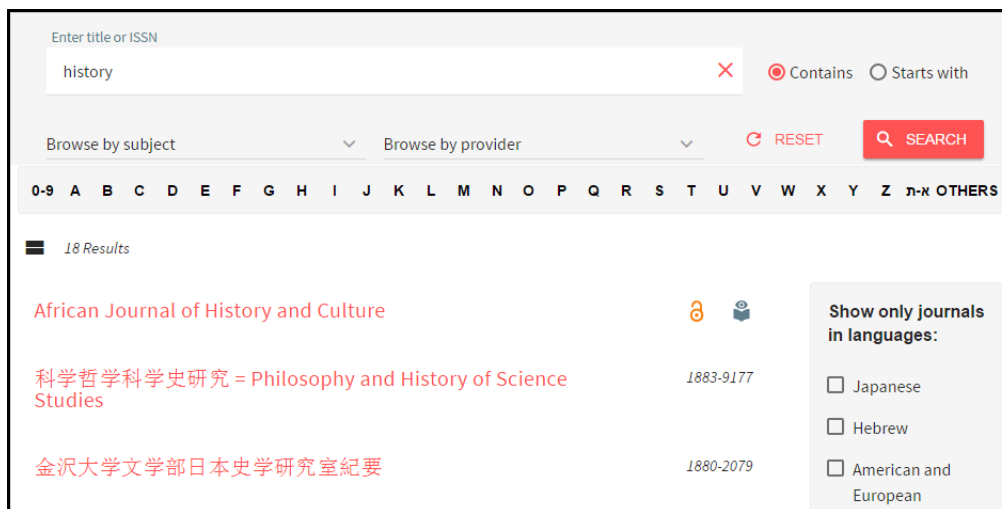


Figure 152: Table View

In Table view, the following information is displayed:

- **Journal title** – Click to skip the SFX menu and display full text (if directLink is turned on).
- **ISSN** – The ISSN of the journal.
- **Peer-reviewed indicator** – Indicates that the journal is peer reviewed
- **Open Access indicator** – Indicates that the journal is at least partially openly accessible

## Detail View

The following is an example of the Journal Search display in Detail view:

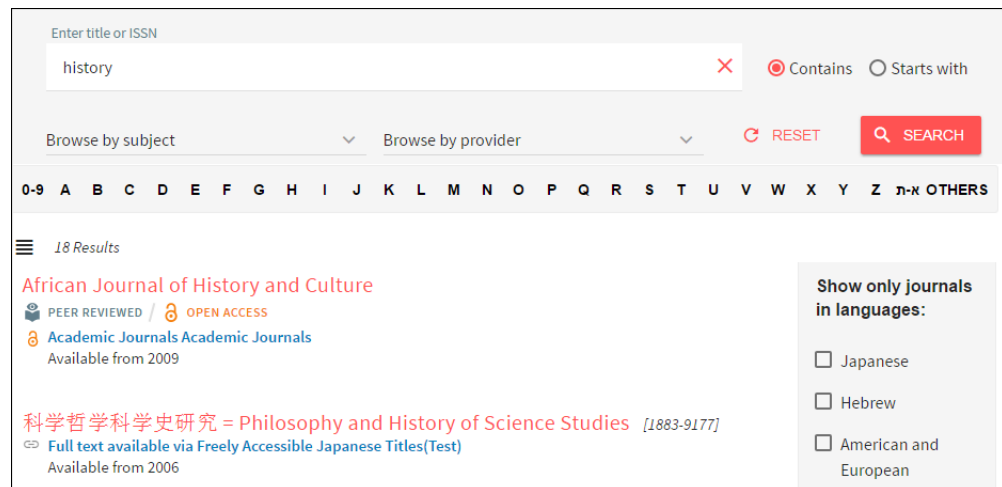


Figure 153: Detail View

In Detail view, the following information is displayed:

- **Journal Title** – Click to skip the SFX menu and display full text (if directLink is turned on).
- **Availability Statement** – Click the target name to skip the SFX menu and display full text (if directLink is turned on). The OpenURL link includes the Object portfolio ID to ensure the SFX menu displays only this target. The Object portfolio threshold information is displayed in the Availability Statement. Note that object portfolio thresholds (of the type parsedDate and TimeDiff) are included, but not target or target service thresholds.
- **Peer-reviewed indicator** – Indicates that the journal is peer reviewed
- **Open Access indicator** – Indicates that the journal is at least partially openly accessible

### Full View

You can click the title of a journal that is displayed in Table View or Detail view. Journal information is displayed in a side pane – Full view.

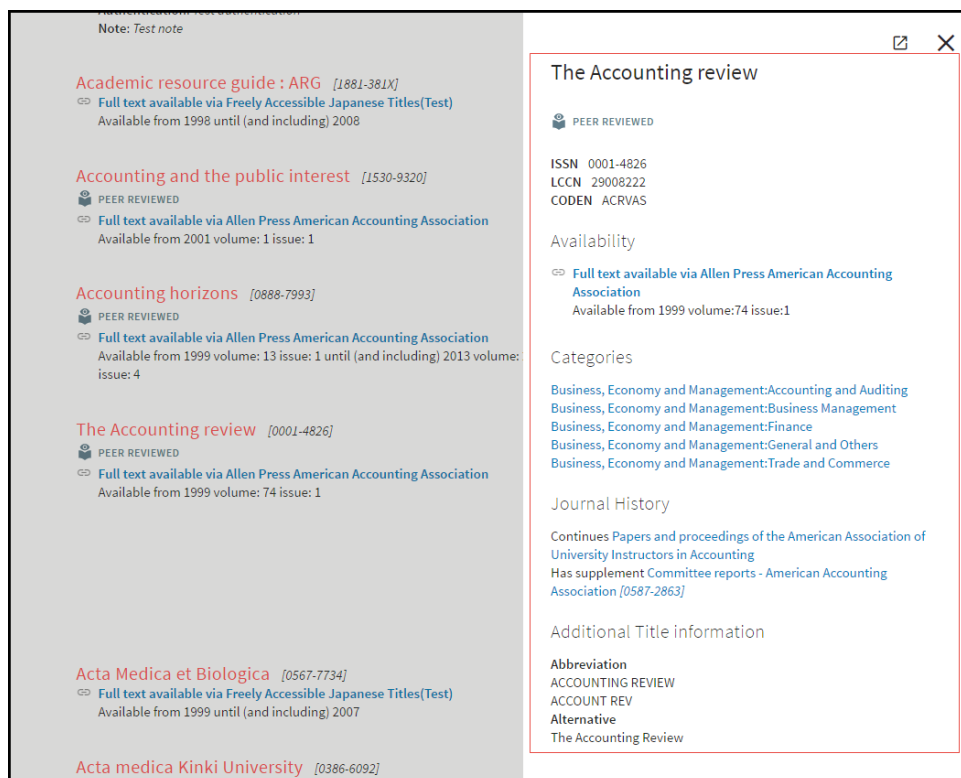


Figure 154: Full View

In Full view, the following information is displayed:

- **Journal title** – Click to skip the SFX menu and display full text (if directLink is turned on).
- **ISSN** – The ISSN of the journal.
- **LCCN** – **The Library of Congress number**
- **CODEN**
- **Peer-reviewed indicator** – Indicates that the journal is peer reviewed
- **Open Access indicator** – Indicates that the journal is at least partially openly accessible
- **Availability Statement** – Click the target name to skip the SFX menu and display full text (if directLink is turned on). The OpenURL link includes the Object portfolio ID to ensure the SFX menu displays only this target. The Object portfolio threshold information is displayed in the Availability Statement. Note that object portfolio thresholds (of the type parsedDate and TimeDiff) are included, but not target or target service thresholds.
- **Categories** – The categories to which the Journal belongs
- **Journal History** – displays related object information

- **Additional Journal title information**

## Multi-Language Journal Search

The SFX Journal Search can be set up to support several languages in order to cater to end users in multiple language environments. For additional information about creating new language translations, see [Translations and Display](#) on page 481.

The user interface language can be set in several ways:

- A drop-down list can be displayed in the Journal Search, allowing end users to select their language of choice.
- A parameter in the Journal Search URL can be used to set the appropriate language. This option is used by MetaLib. For more information, see [Accessing the A-Z List](#) on page 334.
- The default language can be defined for each Journal Search profile by the SFX administrator.

Below is an example of an Journal Search with the language drop-down list:

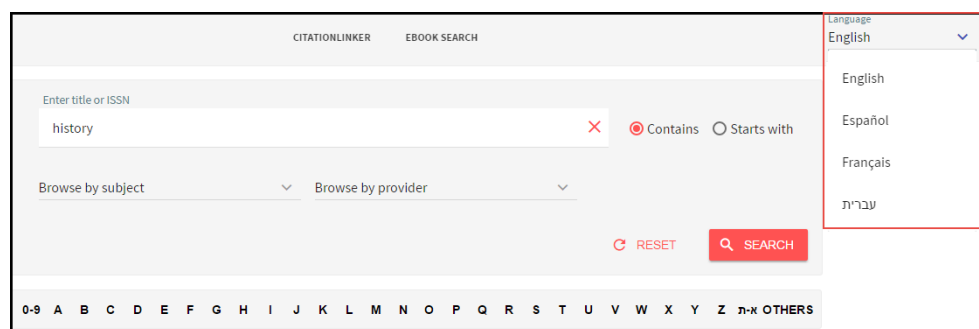


Figure 155: Language Drop-Down List

The language of the SFX Journal Search also determines the language in which the SFX menu is presented when clicking an SFX link in the Journal Search.

A set of configuration options and a separate translations section are available for this feature in the SFX Admin Center.

### Configuring the Multi-Language Journal Search

You can configure the multi-language Journal Search.

#### To configure the multi-language Journal Search:

- 1 Confirm that all the languages in which you want to offer the Journal Search are available in the Translations & Display tool. (See [Translations and](#)

**Display** on page 481 for more information.) Adapt the wording for any A-Z textual element, as desired.

- 2 If the interface language of your choice is not currently offered in the global KnowledgeBase, define a new language and the wording for each A-Z textual element in the Translations & Display tool.

Out-of-the-box, SFX comes with English A-Z wording and a number of additional languages. More languages will be added in the future.

- 3 For each A-Z profile, define the:
  - Default language
  - Languages to be offered in the language drop-down list of the Journal Search

---

**NOTES:**

Content defined in KBManager cannot be translated. This includes:

- Target public names
  - The target service public name defined for specific target services
  - Note and authentication information
- 

### ***Working with the Hebrew Journal Search***

To use the Journal Search in Hebrew, select עברית from the language drop-down list. The following is displayed:



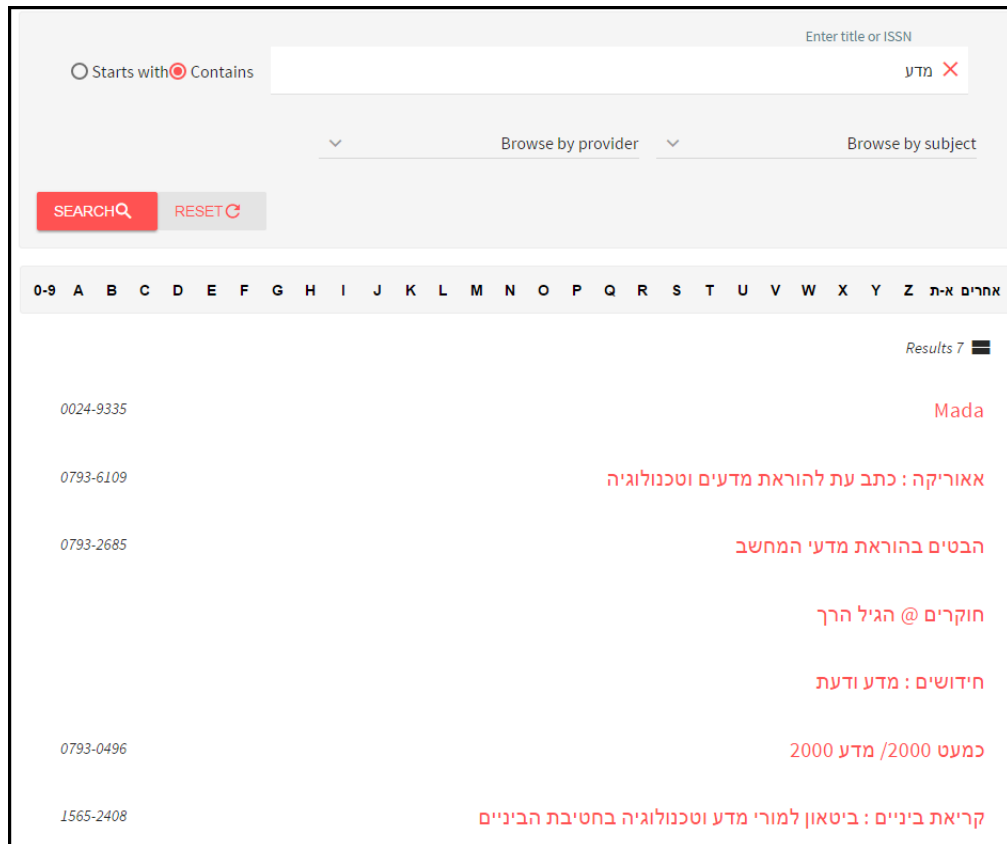


Figure 156: Hebrew Journal Search

The following elements are now displayed in Hebrew and are right-aligned in all tabs of the Journal Search:

- All search boxes, all search options including radio buttons, as well as all search box labels
- All result display elements - including all the journal and availability information (note that both Hebrew and non-Hebrew journals will be right-aligned)
- All result navigation elements
- The top header, Journal Search title, and language drop-down list

The following is an example of the results display in Hebrew:

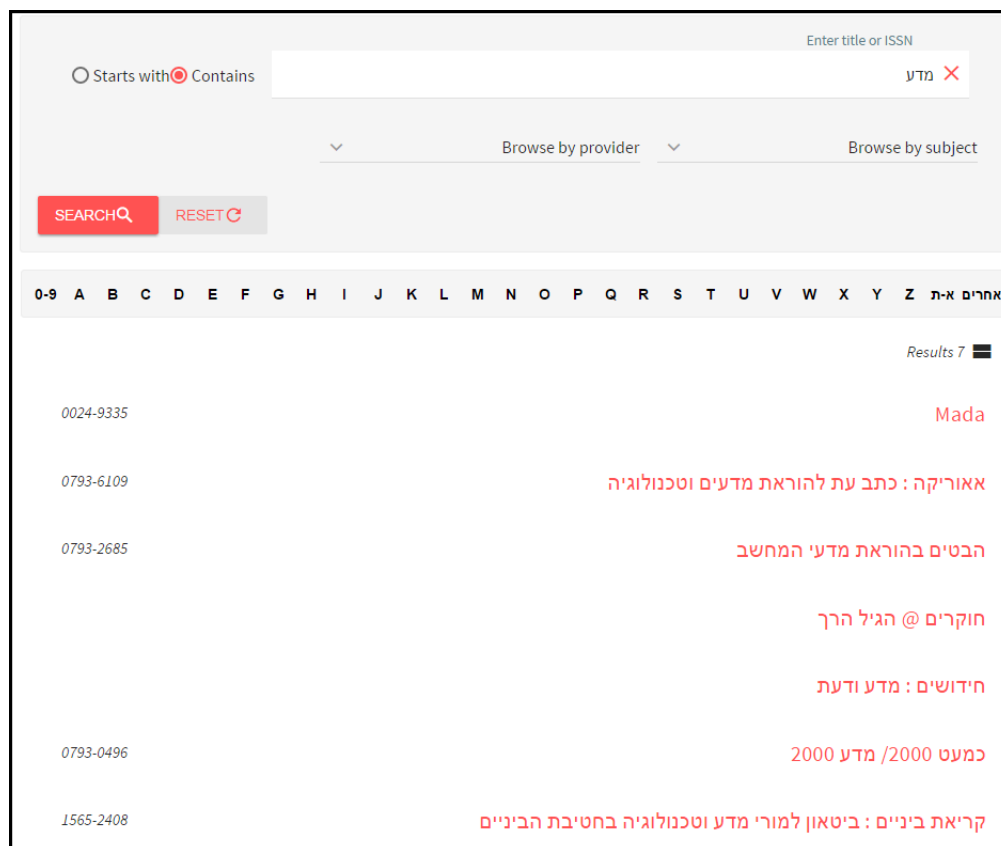


Figure 157: Hebrew Journal Search Results Display

In the Hebrew Journal Search results display, text is right-aligned.

## Journal Search Related Objects

The SFX KnowledgeBase contains information about relations between objects. For example, if a journal ceases to exist and is continued by another journal, the two journals are considered related. Also, if one journal is a supplement to another journal, the two journals are considered related. These object relations may be valuable for end users when searching or browsing the SFX Journal Search or even when clicking an SFX button in a database. They may remember an older name for a journal, or be interested in SFX services for a related journal.

When a user sends an OpenURL to SFX for a particular object, it is possible to configure whether services for these related objects are included in the SFX menu and how these services are presented. Services for the related objects can be of the following types: full-text, abstract, TOC, and holding services.

Related object services are relevant to end users for the following reasons:

- Articles sought may be available only in related versions of the journal.

- Metadata in the OpenURL can be for one publication, but in fact, a related journal by another name is what the end user sought.
- Vendors can list previous or newer versions in their holdings, causing inconsistencies in the SFX KnowledgeBase.

For example, the journal *Civil Engineering Systems* does not have full-text, but it is followed by *Civil Engineering and Environmental*, which is available in full-text. Both journals are included in the Journal Search, and a link allows jumping from journal A to journal B and vice versa.

The type of relationship between the journals is indicated in the e-Journal Details dialog box of the journal record and in the Detail view. Only a journal to which you are subscribed displays availability information (for example, **full-text available from**). For a list of relation types used in SFX, see **Table 8 Relation Types Used in SFX** on page 95.

For example, the following is the result list in the Detail view where two related journals are displayed, but only the first one has an active full-text portfolio.

---

**NOTE:**

Clicking the relationship link causes only the related object to be displayed.

---

The Accounting review [0001-4826]  
PEER REVIEWED  
Full text available via Allen Press American Accounting Association  
Available from 1999 volume: 74 issue: 1

Business, Economy and Management: Accounting and Auditing  
Business, Economy and Management: Business Management  
Business, Economy and Management: Finance  
Business, Economy and Management: General and Others  
Business, Economy and Management: Trade and Commerce  
Continues Papers and proceedings of the American Association of University Instructors in Accounting  
Has supplement Committee reports - American Accounting Association [0587-2863]

Figure 158: Detail View

### Configuring Journal Search Related Objects

To activate the related object functionality, select **Include related object information in the Journal Search** from the Display section. For more information, see **Content** on page 355.

---

**NOTE:**

When the related object functionality is first activated, you must rebuild the SFX Journal Search. See **Building the Journal Search** on page 333.

---

When object relations is activated, objects are included in the Journal Search even if they have no active portfolios if they are related to an object in the Journal Search that does have one or more active portfolios.

## AJAX Auto-Complete for the Journal Search

The Journal Search and eBook Search include a configuration option to enable AJAX based automatic completion of titles during searches in the eBook Search and the Titles search tab of the Journal Search.

When the AJAX feature is activated, an auto-complete drop-down list presents a preview of the search results and suggests titles to be used as search terms when you begin to type in the search box.

The following is an example of an auto-complete drop-down list:

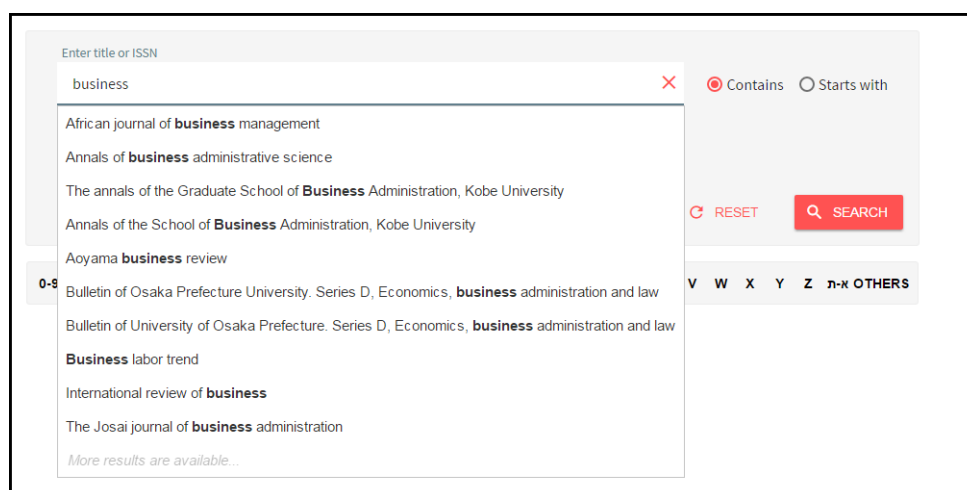


Figure 159: Auto-Complete

Auto-complete is available only with **Starts with** and **Contains** searches. When AJAX is enabled, the **Exact** search option is not displayed, since clicking a title within the auto-complete list for either the **Starts with** or **Contains** search has the same result as an **Exact** search.

If more than 10 results are found, only the first 10 results are displayed. In this case, to benefit from the auto-complete list, choose a more specific title search term.

You can either select a title from the auto-complete list or you can click **Go** to execute a title search with the search term entered manually in the Title box.

The text of the **more results available** message is configurable in the Translation & Display section. For more information, see [Translations and Display](#) on page 481.

## Configuring AJAX Auto-Complete for the Journal Search

### To activate AJAX auto-complete:

- 1 Select **Enable Ajax for title search** from the Display section. For more information, see **Display** on page 368.
- 2 If the following template has been customized or a symbolic link to the file in `sfxglb41` has been broken, you must copy the file from `sfxglb41` and re-customize it:

```
exlibris/sfx_ver/sfx4_1/<instance>/templates/azlist_ver3/  
title_head.tpl
```

The AJAX feature appears in the Journal Search only with the latest version of the template file.

## Building the Journal Search

The Journal Search must be built using the Server Admin Utility in the following situations:

- Before you can start using the Journal Search for the first time
- After changes in the SFX KnowledgeBase related to activation or institute settings
- After changes in the A-Z sorting setup
- When configuration changes are made for either the default profile or an additional profile.

Next to each field in the Configuration section that requires a rebuild when changed is either one asterisk that indicates that a rebuild of both the RSI and A-Z indexes are required or two asterisks that indicates that only a rebuild of the A-Z index is required.

For more information, refer to the **A-Z Index** section of the *SFX System Administration Guide*.

---

### NOTES:

- Journals in the SFX KnowledgeBase missing required title information for display or sorting are not be included in the Journal Search. They are listed in the log file generated during the A-Z index creation. This log file is stored in the following directory: `exlibris/sfx_ver/sfx4_1/<instance>/logs/`.
- You must define a country in order to build the Journal Search. For more information, see **Language** on page 372.
- To ensure that the A-Z Index is updated daily with changes in the SFX instance, it is recommended to set up a cron job to build the A-Z Index.

This is done with the Server Admin Utility. For more information, refer to the **A-Z Index** section of the *SFX System Administration Guide*.

---

## SFX A-Z List

The following sections describe the old version of the A-Z list.

### Accessing the A-Z List

To access the A-Z List, type the following URL in your Web browser:

`http://<sfx_server>:<port>/<instance>/az/`



Figure 160: A-Z List

The following parameters can be added to the A-Z List URL:

- `lang=<3digit_language_code>`

This parameter is used to present the appropriate language A-Z List. The accepted three-digit language codes are all ISO 639-2 three-letter codes (plus chi-simplified and chi-traditional). Information and a list of codes can be found at: <http://www.loc.gov/standards/iso639-2/>

For example: <http://demo.exlibrisgroup.com:3210/demo/az/?lang=eng>

- `embedded=<ExL_product>`

This parameter is used to embed the SFX A-Z List in the MetaLib iframe. Set the value of `<ExL_product>` to be ML. When included in the URL, SFX removes the top banner, title, and language bar from the SFX A-Z List. These

elements of the A-Z List are not displayed, since they are provided by the MetaLib interface in which the SFX A-Z List is embedded.

For example: <http://demo.exlibrisgroup.com:3210/demo/az/?embedded=ML>

---

**NOTE:**

Click the **Cookie Policy** link at the bottom of the A-Z List to display a description of the SFX Privacy Policy and how Ex Libris uses cookies.

---

## Searching with the A-Z List

The A-Z List consists of the following sections:

- **Titles** on page 335 – Allows browsing and searching of journal titles
- **Kanji Character Variant Searching** on page 338 – Configure title searching for variant Kanji characters
- **Category** on page 339 – Allows browsing of journals by category
- **Locate** on page 339 – Allows advanced searching options (search by journal title, ISSN, category, and vendor)
- **CitationLinker** on page 340 – Form to fill in journal citation information in order to get a corresponding SFX menu. It can be used if the user found citation information prior to accessing the A-Z List.

### Titles

The A-Z list supports three types of title searches:

- **Starts with** – The result set can be configured to be either:
  - **Browse list** – A list of all the journal titles in alphabetical order, starting with the title searched or the closest point to it. From this list, you are able to browse through the entire A-Z journal list. The number of results is the total number of all journals indexed. Use the **Previous** and **Next** buttons to browse through the list. SFX tries to match the search term entered with a Main title in the A-Z index. If at least one match is found, it is the first journal displayed in the Browse list. Only main titles are searched. All other types of titles (abbreviated, alternative, uniform, and translation titles) are excluded from this type of search.

---

**NOTE:**

This option is available for all languages except for Japanese. If Japanese titles are searched, the Browse setting is ignored and a search result set is presented.

---

- **Search set** – Displays a limited list of A-Z List journal titles that start with the search term used in any of the title fields of the journal. The

result count number in the search set is the number of journals that start with the search term used.

The following is an example of a Browse list result:

The screenshot shows the 'Find e-Journal' interface. At the top, there are tabs for 'Title', 'Category', 'Locate', and 'CitationLinker'. Below these is a search bar with the text 'academic' and a 'Go' button. There are radio buttons for 'Starts with' (selected), 'Contains', and 'Exact'. A navigation bar shows '0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Others'. Below the search bar, a box highlights 'Total number of e-Journals: 15176' and a link to 'Switch to Detail View'. A second box highlights 'Showing page 4 of 1519 pages.' with navigation arrows. Below this is a table of journal titles with columns for 'Journal title', 'ISSN', and 'Actions'.

Journal title	ISSN	Actions
<a href="#">Academic and library computing</a> [View journal history for additional full text]	1055-4765	<a href="#">i</a> <a href="#">🔍</a>
<a href="#">Academic leader</a>	8750-7730	<a href="#">i</a> <a href="#">🔍</a>
<a href="#">Academic leadership</a>	1500-7012	<a href="#">i</a> <a href="#">🔍</a>
<a href="#">Academic open Internet journal</a>	1311-4360	<a href="#">i</a> <a href="#">🔍</a>

Figure 161: Browse List

The following is an example of a search set result:



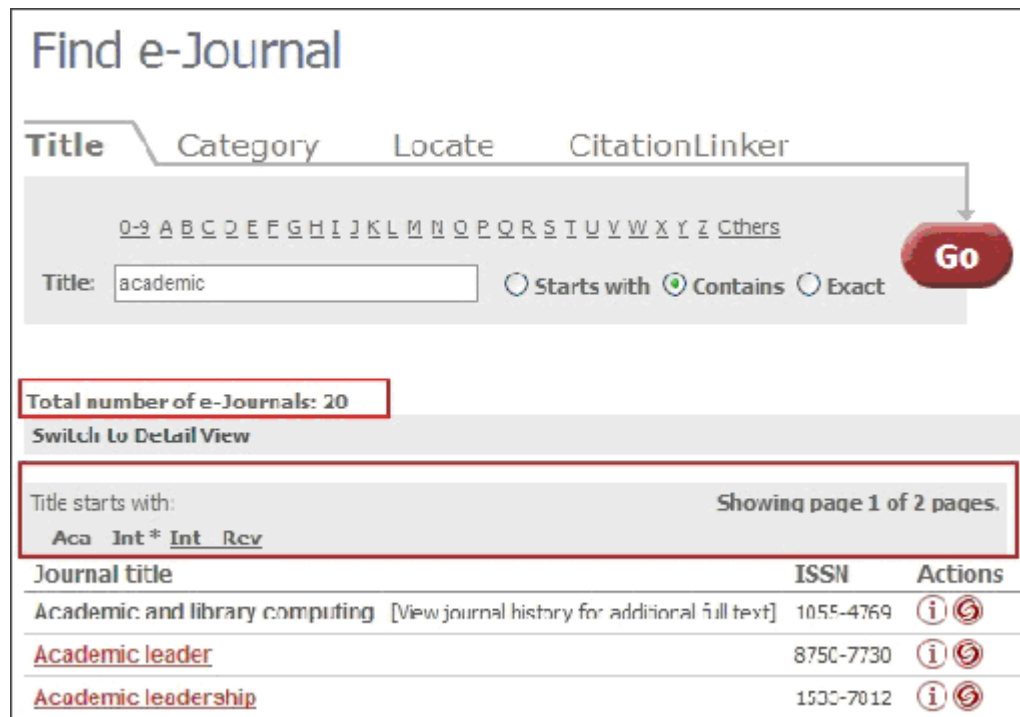


Figure 162: Search Set

The configuration of the **Starts with** search is described in [Configuring the Journal Search, A-Z List, and Fetch Item](#) on page 352.

- **Contains** – The result set includes all journal titles that contain the search terms entered. When multiple search terms are used, double quotes can be used to indicate a phrase search. In a phrase search, the order and adjacency of the search terms are taken into account when performing the search.

When no double quotes are used to indicate a phrase search, all search terms must exist in the main or abbreviated titles of the journals displayed, but adjacency and order of words are not taken into account.

For example, if you search for **university journal**, the following two results are displayed:

University journal of excellence in research  
Research journal from Columbia University

If you search for **“university journal”** only the first journal is displayed.

- **Exact** – The result set includes all journal titles that match the search term exactly. The Exact search option is not shown when the **AJAX auto-complete** option is enabled, as its functionality is replaced by clicking a title within the auto-complete list. More information on AJAX can be found in [AJAX Auto-Complete](#) on page 349.

If the A-Z List is configured to display language control, language checkboxes are displayed. For example:

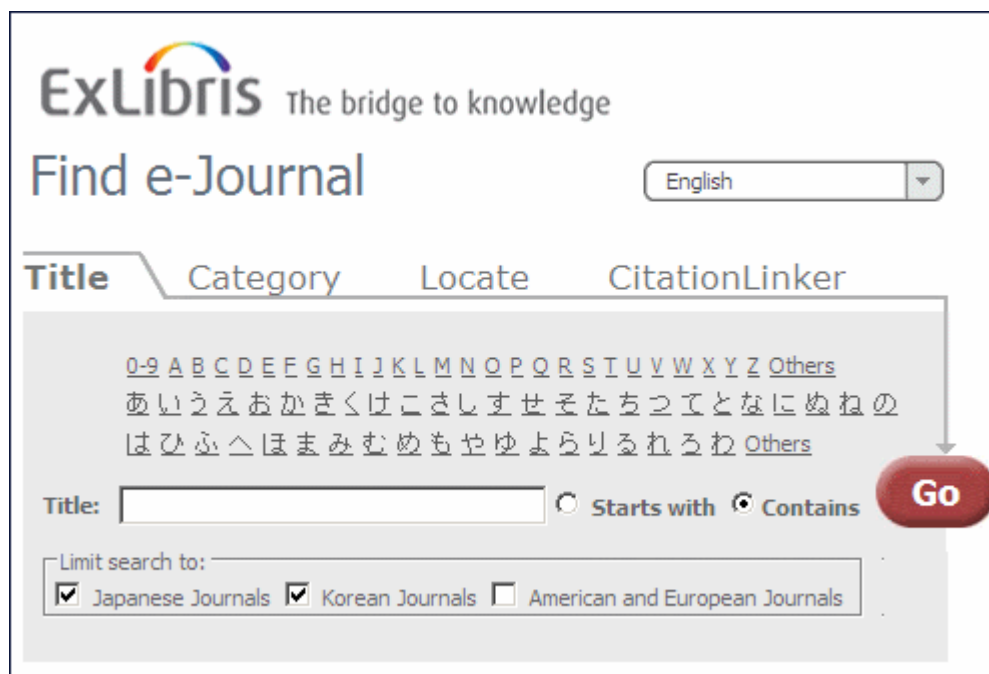


Figure 163: A-Z List with Language Control Displayed

The language checkboxes allow you to restrict the results returned by SFX to a specific writing system. For example, if you select American and European Journals, the search results include only those journals with a language that uses the Latin writing system.

If you do not select a language checkbox, SFX performs a search without any restrictions.

The **Limit search to** checkboxes are displayed only in the **Title** tab of the A-Z List. In the **Locate** tab, the title search is performed without any writing system restrictions.

The **Limit search to** checkboxes are not displayed for the **Starts with** browse search, since the result are displayed not as a search set, but as a browsable list of all A-Z List journals.

For more information on configuring the **Limit search to** checkboxes, see [UI Language Control](#) on page 373.

### ***Kanji Character Variant Searching***

Some Japanese Kanji characters have variants that are treated as identical for title searching. For configuration information, see [Country and Language Settings](#) on page 420.

## Category

Click the **Category** tab to search by category. The following is displayed:

Category	SubCategory
Michael's Translation	All subcategories (1) General and Others (1) Hematology (1)

Figure 164: Category

Select a category and subcategory and click **Go**.

## Locate

Click the **Locate** tab to conduct an advanced search. The following is displayed:

ExLibris The bridge to knowledge

## Find e-Journal

English

Title Category **Locate** CitationLinker

Title:   Starts with  Contains  Exact

ISSN

Vendor

- China Online Journals
- East View
- Proquest

Category

- Earth Sciences
- Environmental Sciences
- Physics
- Agriculture Sciences
- Material Science and Metallurgy

[clear](#) **Go**

Search results for:

Figure 165: Locate

### **CitationLinker**

Click the **CitationLinker** tab to manually create an OpenURL that is then sent to the SFX server. The following is displayed:

Figure 166: CitationLinker

For more information, see [CitationLinker and Fetch Item](#) on page 511.

## A-Z Result Display

After you perform a search, the A-Z list displays the results in Table view or Detail view. For information on determining which view is displayed by default, see [Display](#) on page 368.

### Table View

The following is an example of the A-Z List display in Table view:

<a href="#">Bank advertising news</a>		0274-7111		
<a href="#">Bank bailout litigation news</a>		1047-5133		
<a href="#">Bank investment consultant</a>	[View journal history for additional full text]	1543-2068		
<a href="#">Bank investment marketing</a>	[View journal history for additional full text]	1088-730X		

Figure 167: Table View

In Table view, the following information is displayed:

- **Journal title** – Click to skip the SFX menu and display full text (if directLink is turned on).
- **ISSN** – The ISSN of the journal.

- **i button** – Click to display the details dialog box with journal information.
- **SFX button** – Click to display the SFX menu.

### Detail View

The following is an example of the A-Z List display in Detail view:

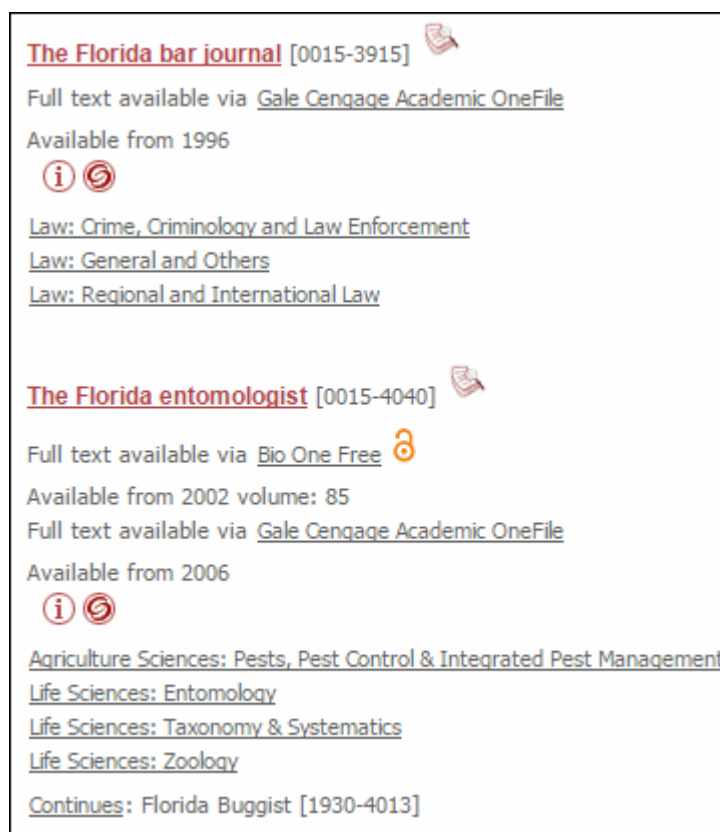


Figure 168: Detail View

In Detail view, the following information is displayed:

- **Journal Title** – Click to skip the SFX menu and display full text (if directLink is turned on).
- **Availability Statement** – Click the target name to skip the SFX menu and display full text (if directLink is turned on). The OpenURL link includes the Object portfolio ID to ensure the SFX menu displays only this target. The Object portfolio threshold information is displayed in the Availability Statement. Note that object portfolio thresholds (of the type parsedDate and TimeDiff) are included, but not target or target service thresholds.
- **i button** – Click to display the details dialog box with journal information.
- **SFX button** – Click to display the SFX menu.

- **Peer-reviewed indicator** – Indicates that the journal is peer reviewed
- **Open Access indicator** – Indicates that the journal is at least partially openly accessible

By default, the following information is included in the Details dialog box:

- Journal titles
  - Main
  - Abbreviated
  - Uniform
  - Alternative
  - Translation
- ISSN
- CODEN
- Categories
- Availability information
- Note
- Authentication
- Journal History (with related journal information)

## Multi-Language A-Z List

The SFX A-Z List can be set up to support several languages in order to cater to end users in multiple language environments. For additional information about creating new language translations, see [Translations and Display](#) on page 481.

The user interface language can be set in several ways:

- A drop-down list can be displayed in the A-Z List, allowing end users to select their language of choice.
- A parameter in the A-Z List URL can be used to set the appropriate language. This option is used by MetaLib. For more information, see [Accessing the A-Z List](#) on page 334.
- The default language can be defined for each A-Z List profile by the SFX administrator.

Below is an example of an A-Z List with the language drop-down list:

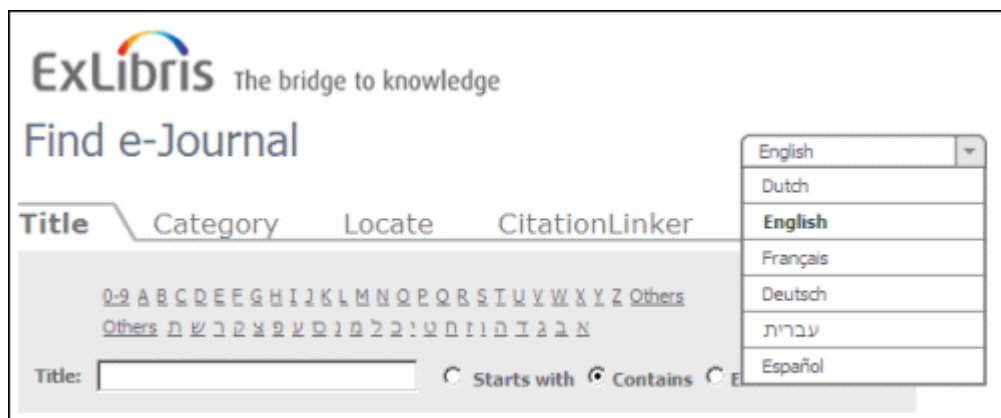


Figure 169: Language Drop-Down List

The language of the SFX A-Z List also determines the language in which the SFX menu is presented when clicking an SFX link in the A-Z List.

A set of configuration options and a separate translations section are available for this feature in the SFX Admin Center.

### **Configuring the Multi-Language A-Z List**

You can configure the multi-language A-Z list.

#### **To configure the multi-language A-Z List:**

- 1 Confirm that all the languages in which you want to offer the A-Z List are available in the Translations & Display tool. (See **Translations and Display** on page 481 for more information.) Adapt the wording for any A-Z textual element, as desired.
- 2 If the interface language of your choice is not currently offered in the global KnowledgeBase, define a new language and the wording for each A-Z textual element in the Translations & Display tool.

Out-of-the-box, SFX comes with English A-Z wording and a number of additional languages. More languages will be added in the future.

- 3 For each A-Z profile, define the:
  - Default language
  - Languages to be offered in the language drop-down list of the A-Z List

---

#### **NOTES:**

Content defined in KBManager cannot be translated. This includes:

- Target public names



- The target service public name defined for specific target services
- Note and authentication information

### Working with the Hebrew A-Z List

To use the A-Z List in Hebrew, select עברית from the language drop-down list. The following is displayed:

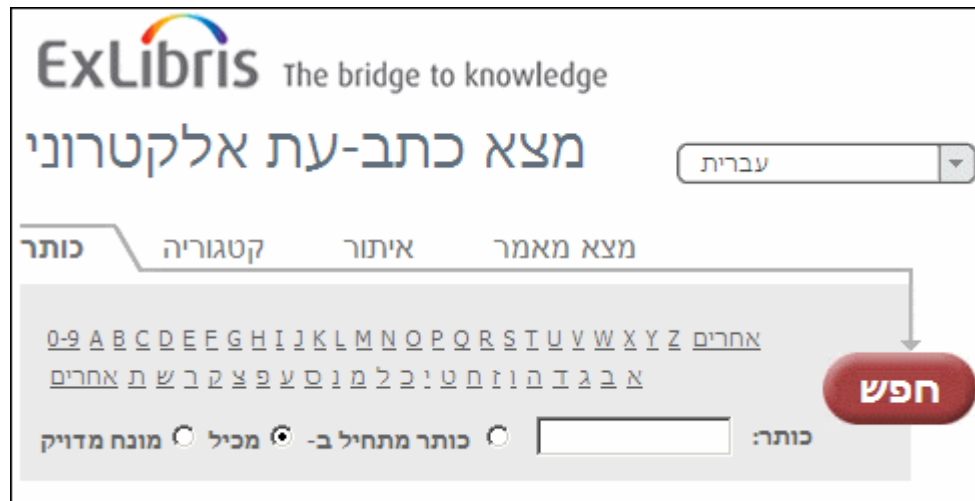


Figure 170: Hebrew A-Z List

The following elements are now displayed in Hebrew and are right-aligned in all tabs of the A-Z list:

- All search boxes, all search options including radio buttons, as well as all search box labels
- All result display elements - including all the journal and availability information, SFX and 'i' buttons (note that both Hebrew and non-Hebrew journals will be right-aligned)
- All result navigation elements

The following elements, however, remain left-aligned:

- The top header, A-Z list title, and language drop-down list
- The navigation tabs for Title, Category, Locate, and CitationLinker
- The **Go** button.

The following is an example of the results display in Hebrew:



Figure 171: Hebrew A-Z List Results Display

In the Hebrew A-Z List results display, text is right-aligned.

## Related Objects

The SFX KnowledgeBase contains information about relations between objects. For example, if a journal ceases to exist and is continued by another journal, the two journals are considered related. Also, if one journal is a supplement to another journal, the two journals are considered related. These object relations may be valuable for end users when searching or browsing the SFX A-Z List or even when clicking an SFX button in a database. They may remember an older name for a journal, or be interested in SFX services for a related journal.

When a user sends an OpenURL to SFX for a particular object, it is possible to configure whether services for these related objects are included in the SFX menu and how these services are presented. Services for the related objects can be of the following types: full-text, abstract, TOC, and holding services.

Related object services are relevant to end users for the following reasons:

- Articles sought may be available only in related versions of the journal.
- Metadata in the OpenURL can be for one publication, but in fact, a related journal by another name is what the end user sought.
- Vendors can list previous or newer versions in their holdings, causing inconsistencies in the SFX KnowledgeBase.

For example, the journal *Civil Engineering Systems* does not have full-text, but it is followed by *Civil Engineering and Environmental*, which is available in full-text.

Both journals are included in the A-Z List, and a link allows jumping from journal A to journal B and vice versa.

The type of relationship between the journals is indicated in the e-Journal Details dialog box of the journal record and in the Detail view. Only a journal to which you are subscribed displays availability information (for example, **full-text available from**). For a list of relation types used in SFX, see **Table 8 Relation Types Used in SFX** on page 95.

For example, the following is the result list in the Detail view where two related journals are displayed, but only the first one has an active full-text portfolio.

**NOTE:**

Clicking the relationship link causes only the related object to be displayed.



Figure 172: Detail View

In the Table view, the result is the following:









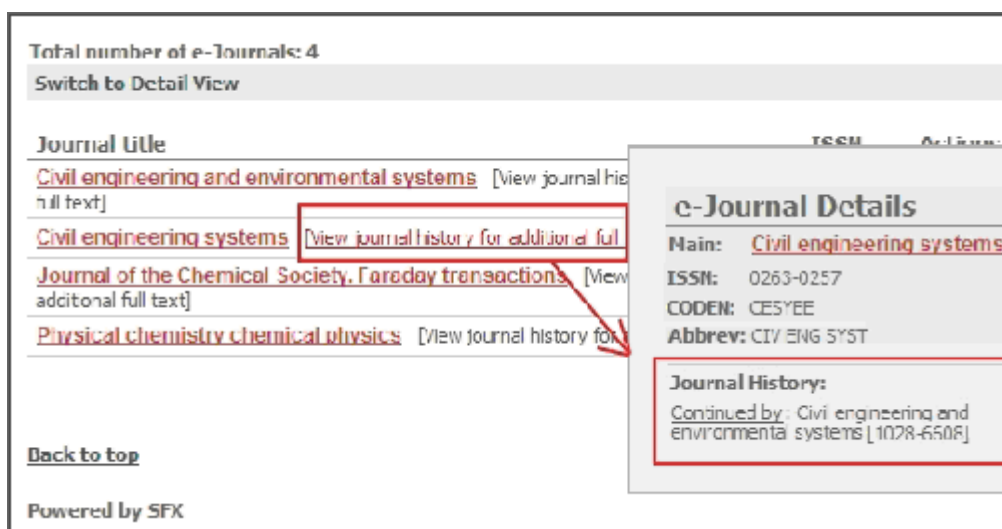
<a href="#">Bank advertising news</a>		0274-7111	 
<a href="#">Bank bailout litigation news</a>		1047-5133	 
<a href="#">Bank investment consultant</a>	[View journal history for additional full text]	1543-2068	 
<a href="#">Bank investment marketing</a>	[View journal history for additional full text]	1088-730X	 

Figure 173: Table View

Clicking **View journal history for additional full text** displays the e-Journal Details dialog box with the journal history. Clicking the link for the relation type refreshes the result page and shows only that particular related journal.

For example:



Total number of e-Journals: 4  
Switch to Detail View

Journal title	ISSN	Relation
<a href="#">Civil engineering and environmental systems</a> [View journal history for additional full text]		
<a href="#">Civil engineering systems</a> [View journal history for additional full text]		
<a href="#">Journal of the Chemical Society, Faraday transactions</a> [View journal history for additional full text]		
<a href="#">Physical chemistry chemical physics</a> [View journal history for additional full text]		

[Back to top](#)  
Powered by SFX

### e-Journal Details

Main: [Civil engineering systems](#)  
ISSN: 0263-0257  
CODEN: CESYEE  
Abbrev: CIV ENG SYST

---

**Journal History:**  
Continued by: Civil engineering and environmental systems [1028-6506]

Figure 174: e-Journal Details

### Configuring Related Objects

To activate the related object functionality, select **Include related object information in the A-Z list** from the Display section. For more information, see [Display](#) on page 368.

#### NOTE:

When the related object functionality is first activated, you must rebuild the SFX A-Z List. See [Building the A-Z List](#) on page 351.

When object relations is activated, objects are included in the A-Z List even if they have no active portfolios if they are related to an object in the A-Z List that does have one or more active portfolios.

## AJAX Auto-Complete

The A-Z List and eBook Search include a configuration option to enable AJAX based automatic completion of titles during searches in the eBook Search and the Titles search tab of the A-Z List.

When the AJAX feature is activated, an auto-complete drop-down list presents a preview of the search results and suggests titles to be used as search terms when you begin to type in the search box.

The following is an example of an auto-complete drop-down list:

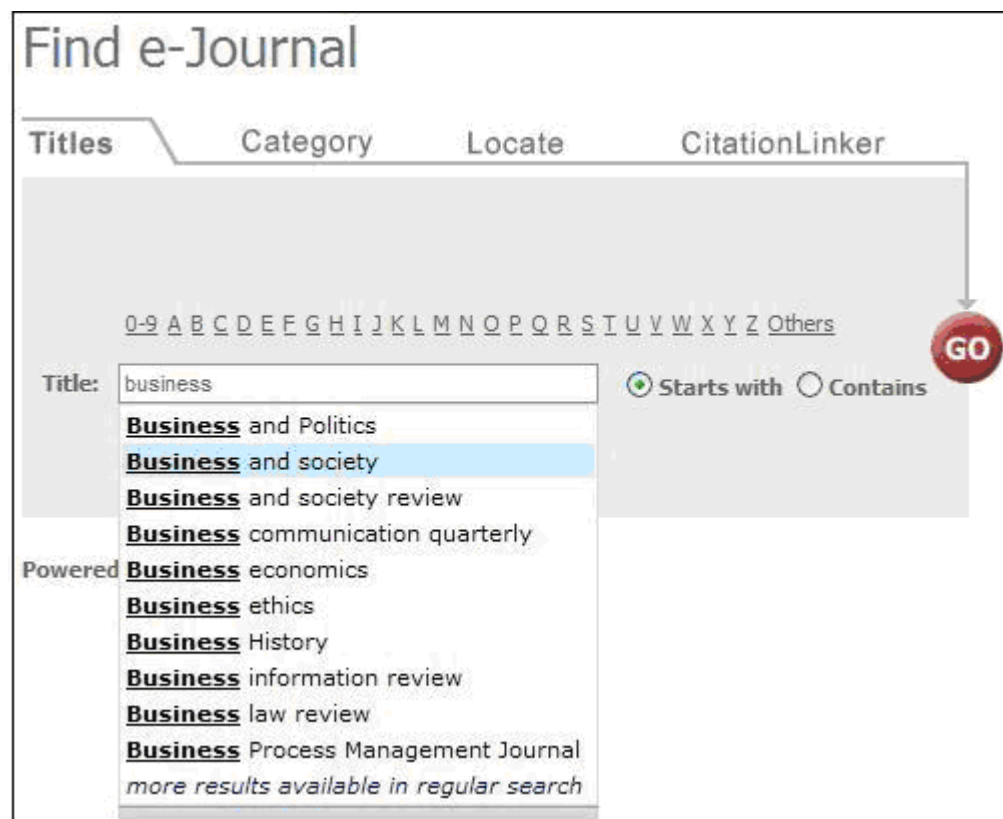


Figure 175: Auto-Complete

Auto-complete is available only with **Starts with** and **Contains** searches. When AJAX is enabled, the **Exact** search option is not displayed, since clicking a title within the auto-complete list for either the **Starts with** or **Contains** search has the same result as an **Exact** search.

If more than 10 results are found, only the first 10 results are displayed. In this case, to benefit from the auto-complete list, choose a more specific title search term.

You can either select a title from the auto-complete list or you can click **Go** to execute a title search with the search term entered manually in the Title box.

The text of the **more results available** message is configurable in the Translation & Display section. For more information, see [Translations and Display](#) on page 481.

## Configuring AJAX Auto-Complete

### To activate AJAX auto-complete:

- 1 Select **Enable Ajax for title search** from the Display section. For more information, see [Display](#) on page 368.
- 2 If the following template has been customized or a symbolic link to the file in `sfxglb41` has been broken, you must copy the file from `sfxglb41` and re-customize it:

```
exlibris/sfx_ver/sfx4_1/<instance>/templates/azlist_ver3/  
title_head.tpl
```

The AJAX feature appears in the A-Z List only with the latest version of the template file.

### To check whether the template has been localized:

Log on as the instance user and type the following:

```
tm  
cd azlist_ver3  
ls -la title_head.tpl
```

- If the file is symbolically linked, the following is displayed:

```
title_head.tpl -> exlibris/sfx_ver/sfx4_1/sfxglb41/  
templates/ azlist_ver3/title_head.tpl
```

- If the file is not symbolically linked, first use the `diff` command in order to find the differences between your customized file and the original file, `title_head_old.tpl`.
- a Move to the `templates/azlist_ver3` directory and run the following command:

```
Diff title_head.tpl title_head_old.tpl
```

A list of differences between the files is displayed.

- b Save the differences for use in re-customization.
- c Create a new symbolic link by logging on as the instance user and typing the following:

```
tm
cd azlist_ver3
mv title_head.tpl title_head.tpl.bak
ln -s exlibris/sfx_ver/sfx4_1/sfxglb41/templates/azlist_ver3/
title_head.tpl .
```

- d Re-customize the file using the list of differences.

## Building the A-Z List

The A-Z List must be built using the Server Admin Utility in the following situations:

- Before you can start using the A-Z List for the first time
- After changes in the SFX KnowledgeBase related to activation or institute settings
- After changes in the A-Z sorting setup
- When configuration changes are made for either the default profile or an additional profile.

Next to each field in the Configuration section that requires a rebuild when changed is either one asterisk that indicates that a rebuild of both the RSI and A-Z indexes are required or two asterisks that indicates that only a rebuild of the A-Z index is required.

For more information, refer to the **A-Z Index** section of the *SFX System Administration Guide*.

---

### NOTES:

- Journals in the SFX KnowledgeBase missing required title information for display or sorting are not be included in the A-Z List. They are listed in the log file generated during the A-Z index creation. This log file is stored in the following directory: `exlibris/sfx_ver/sfx4_1/<instance>/logs/`.
  - You must define a country in order to build the A-Z List. For more information, see **Language** on page 372.
  - To ensure that the A-Z Index is updated daily with changes in the SFX instance, it is recommended to set up a cron job to build the A-Z Index. This is done with the Server Admin Utility. For more information, refer to the **A-Z Index** section of the *SFX System Administration Guide*.
-

## Configuring the Journal Search, A-Z List, and Fetch Item

Depending on which version of the A-Z list you are using, you have the option of configuring the old A-Z list or the Journal Search. For configuration options for the Journal Search, see below. For a description of the configuration options for the old A-Z list, see [Configuring the Old A-Z List](#) on page 364.

Configuration for the CitationLinker is done on the Design section of the Journal Search because they share many configuration options.

## Configuring the Journal Search

Click **Journal Search and A-Z List** from the **Configuration** section of the **Setup & Administration** area and click the **Main** tab.

The following sections are available:

- **General** on page 352
- **Content** on page 355
- **Design** on page 356
- **Search/Results** on page 359
- **Languages** on page 360

### General

Click **General** to display the following page:

The screenshot shows the 'Configuration parameters for Default' page. On the left is a navigation menu with 'General' selected. The main content area includes a 'Select profile' dropdown set to 'Default', a 'Create custom profile' button, and a text field for the default URL: 'http://il-sfxqa06:3410/sfxcl41/journalsearch'. Below this is a section for CitationLinker settings, including a radio button to switch between 'New version' (selected) and 'Old version', and a 'Submit' button. At the bottom, there is a checkbox for 'Transfer your settings from the old AZ list to the new version' with a 'Submit' button.

Figure 176: Journal Search – General

The following table describes the options on this page:



Table 28. Journal Search – General

Field	Description
<b>Select Profile</b>	Select which profile is affected by changes made in the Content, Design, Search/Results, and Languages sections.
<b>Create Custom Profile</b>	Click <b>Create custom profile</b> to display the Profile name field
<b>Profile Name</b>	Enter a name for the new profile and click <b>Create Profile</b> . See
<b>Default URL for your Journal Search and AZ list</b>	The default URL for your Journal Search and AZ list that you can integrate into a Web page.
<b>Active Settings</b>	If you want to switch to the new version of the A-Z list, select <b>New Version</b> and click <b>Submit</b> to make the new version settings your active settings.
<b>Transfer your settings from the old AZ list to the new version</b>	Click <b>Submit</b> to switch to the new version settings.

**NOTE:**

If you edit a profile, you must switch to the default profile for the **Transfer your settings from the old AZ list to the new version option** to appear.

Both the Journal Search and the old A-Z list use the same index. For those configuration options that require re-indexing you can either use the new, or the old settings, but not both in parallel. The following symbols indicate the areas that require reindexing:

- ! – Requires rebuild of Journal Search index only
- !! – Requires rebuild of RSI and Journal Search indexes

It is possible to define Journal Search profiles (for example, in a consortium environment, for the different institutes defined in a particular instance). To do this, click **Create custom profile** from the General section. The profile name field is displayed. Enter a name for your custom profile and click **Create profile**.

**NOTE:**

The profile name cannot include spaces or punctuation – only alphanumeric characters.

For custom profiles, it is possible to define the same parameters that exist for the DEFAULT profile. Additionally, you need to define a profile name that is used

in the URL when accessing the A-Z List for this profile. For example, if the profile named **Boston** is created, the URL to access this A-Z List is:

[http://<sfx\\_server>:<port>/<instance>/az/boston](http://<sfx_server>:<port>/<instance>/az/boston)

It is possible in the A-Z List to include institute information as part of the SFX base URL.

---

**NOTE:**

When multiple institutions are defined within same profile, configuration should be done by IP ranges and not by including the institution name in the URL.

---

The A-Z URL is in the following format:

[http://<SFX\\_base\\_URL><-institute>/az/<institute>](http://<SFX_base_URL><-institute>/az/<institute>)

This institute information is retained when searching or browsing the A-Z List and when using outside links such as the SFX menu.

In the additional profiles, it is possible to add, delete, and edit profiles for one institute, multiple institutes, or groups. This can be done in the **Content** section of each additional profile:

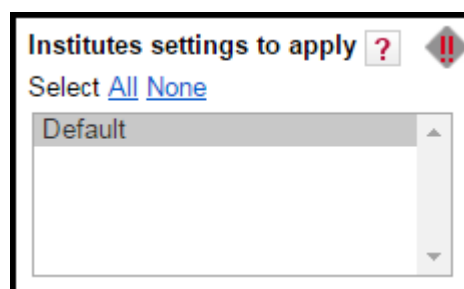


Figure 177: Institutes in the Journal Search

Select an institute from the box to have the Journal Search function like the SFX menu, so that selecting an institute results in an Journal Search that contains everything active for this institute, for groups with which it is affiliated, or active by default.

Inactive settings are taken into account. For example, inactive settings for an institute or a higher-ranked group override active defaults or lower group settings. With this option selected, the DEFAULT institute cannot be selected independently because it is included by inheritance when selecting any other institute or group.

If more than one institute or group is selected, the Journal Search includes anything active for the institutes, groups, and defaults selected. Inactive institutes and group settings are ignored. This option is similar to the way the current Journal Search is calculated.

For more information about institutes, refer to the **Institute Feature** section of the *SFX Advanced User's Guide*.

## Content

From the Content section you can configure the content of the A-Z List results. The following fields are available in the Content section:

Figure 178: Journal Search – Content

The following table describes the fields of the Content section:

Table 29. Journal Search – Content

Field	Description
Specify services included	Select the services to be displayed in the A-Z List.
Exclude Targets	Select the target services to exclude from the A-Z List.
Object types included in the display	Select the object types to include in the A-Z List.

Table 29. Journal Search – Content

Field	Description
<b>Elements included in display</b>	Select the elements you want displayed.
<b>Include related object information in the Journal Search</b>	Select to include related object information in the Journal Search.
<b>Include journals in Journal Search which have no active services, but are related to journals with active services</b>	Select to include journals in the Journal Search which have no active services, but are related to journals with active services.

### **Design**

The Design section is divided into two parts. The top part contains fields that are applicable for both Journal Search and CitationLinker and the bottom part contains fields that are applicable only for Journal Search.

The following fields are available in the Design section:

Home | KBManager | **Configuration**

Menu Configuration | Journal Search and A-Z list | eBook Search | Translation & Display

Main
Journals Quick Search
Old SFX AZ List

Configuration parameters for 'Default'

Submit

General

Content

Design

Search / Results

Languages

Help

Submit


**Configuration applicable to Journal Search, eBook Search and CitationLinker**

**Active CSS file:** [?](#)  
You are currently using the default CSS file without customizations.

Only default CSS  
 Customizations to the default CSS     [?](#)  
 Test CSS [?](#)

**Change/add/remove top bar links (check items to appear in the top bar)** [?](#)  
To change or translate the text displayed for each link, use [SFXAdmin > Translation & Display > AZ JournalSearch](#)

<input checked="" type="checkbox"/> JournalSearch	URL: <input type="text" value="http://ll-sfx08:3410/sst1_4/journalsearch"/>
<input checked="" type="checkbox"/> CitationLinker (Old)	URL: <input type="text" value="http://ll-sfx08:3410/sst1_4/cgi/core/citatio"/>
<input type="checkbox"/> CitationLinker (Fetch Item)	URL: <input type="text" value="http://ll-sfx08:3410/sst1_4/fetchitem"/>
<input checked="" type="checkbox"/> Ebook search	URL: <input type="text" value="http://ll-sfx08:3410/sst1_4/ebooksearch"/>

**Select banner image:**  
Currently used image [?](#) 

[Select image](#)

**Add URL to be used on click on the banner image** [?](#)  
URL:


Disable XSS protection for IE 8 and higher [?](#)

**Configuration applicable only to Journal search**


Show fill-in boxes [?](#)

**User Interface elements to be included in the view** [?](#)

Page header  Search box  AZ Bar  Browse/Search by Category  Browse by provider  Language filters

**Show Peer-reviewed indication:**  [?](#)  
Currently used image [?](#) 

[Select image](#)

**Show Open Access indication:**  [?](#)  
Currently used image [?](#) 

[Select image](#)

**Journal Full display:**  Journal Search sidebar  SFX menu [?](#)

**Service types to be included in Journal Search sidebar:** [?](#)

Available service types	>>>	<<<	Chosen service types
getDOI getMessageNoFullTxt getBookReview getAlikeRecord getAuthor getCitedAuthor	>>>	<<<	getAbstract getTOC getFullTxt getSelectedFullTxt getHolding getDocumentDelivery

Submit

Figure 179: Journal Search – Design

The following table describes the fields of the Design section:

Table 30. Journal Search – Design

Field	Description
<b>Configuration Applicable to both Journal Search and CitationLinker</b>	
<b>Only default CSS</b>	Select this option to use the default CSS for the Journal Search.
<b>Customizations to the default CSS</b>	Select this option to use a customized CSS or the Journal Search. Click <b>Download</b> to download a customized CSS. Click <b>Select File</b> , select a CSS file, and click <b>Submit</b> to upload a customized CSS.
<b>Test CSS</b>	Select this option when testing a customized CSS file. Select a CSS file from the drop-down list and enter an IP address to restrict use of the CSS file to that address.
<b>Change/add/remove top bar links</b>	Select the items that you want to appear in the top bar.
<b>Select banner image</b>	Click <b>Select Image</b> to select a banner image.
<b>Currently used image</b>	Click <b>Select image</b> to select an open access indication image.
<b>Add URL to be used on click on the banner image</b>	Enter the URL to open when clicking the banner image.
<b>Disable XSS protection for IE 8 and higher</b>	Select if Internet Explorer's cross site scripting protection prevents Open URLs from being accepted.
<b>Configuration Applicable only to Journal Search</b>	
<b>Show fill-in boxes</b>	Display the fill-in boxes in the Journal Search sidebar.
<b>User Interface elements to be included in the view</b>	Select the UI elements you want to appear in the Journal Search.
<b>Show Peer-reviewed indication</b>	Select to display a peer reviewed indication in the Journal Search.
<b>Show Open Access indication</b>	Select to display an open access indication in the Journal Search.

Table 30. Journal Search – Design

Field	Description
Journal Full display	Select <b>Journal Search sidebar</b> to display the Journal Search sidebar when clicking a journal in the Results List. (The <b>Service Types to be Included</b> selection boxes appear.) Select <b>SFX menu</b> to display the SFX menu when clicking a journal in the Results List.
Service Types to be included in Journal Search sidebar	Use the arrows to move the services that you want to appear in the sidebar to the Chosen Service Type box.

### Search/Results

The following fields are available in the Search/Results section:

The screenshot shows a web interface with a navigation menu on the left containing 'Main', 'Journals Quick Search', 'Old SFX AZ List', 'General', 'Content', 'Design', 'Search / Results' (highlighted), 'Languages', and 'Help'. The main content area is titled 'Configuration parameters for 'Default'' and contains a 'Submit' button at the top. Under 'Search settings', there are radio buttons for 'Starts with', 'Contains' (selected), and 'Exact'. There are also checkboxes for 'When searching with 'Starts with' show first results that match by display title' (unchecked), 'Enable AutoComplete (Ajax) for title search' (checked), and 'Show search filter for peer-reviewed journals' (checked). Under 'Result list settings', there are radio buttons for 'Table View' and 'Detail View' (selected). A 'Records per page' field is set to '50'. A second 'Submit' button is at the bottom.

Figure 180: Journal Search – Search/Results

The following table describes the fields of the Search/Results section:

Table 31. Journal Search – Search/Results

Field	Description
Default Search	Select either <b>Starts with</b> , <b>Contains</b> , or <b>Exact</b> . By default this is set to <b>Contains</b> .

Table 31. Journal Search – Search/Results

Field	Description
When searching with 'Starts with' show first results that match by display title	Select to display first the results where the Main Title starts with the search term and only after that the results where the alternative titles start with the search term.
<b>Enable AutoComplete (Ajax) for title search</b>	Select to enable the AJAX auto-complete feature. For more information about AJAX, see <a href="#">AJAX Auto-Complete</a> on page 349.
<b>Show search filter for peer-reviewed journals</b>	Select to have a check-box displayed that allows you to filter the results to include only peer-reviewed journals.
<b>Default View</b>	Select either <b>Table View</b> or <b>Detail View</b> .
<b>Records per page</b>	The number of records you want displayed on each page.

### **Languages**

The following fields are available in the Languages section:



Figure 181: Journal Search – Languages

The following table describes the fields of the Languages section:

Table 32. Journal Search – Languages

Field	Description
Show language drop-down	Select to display the language drop-down list in the Journal Search. Select the languages you want to appear in the drop-down list.
Add or change A-Z browse bar headers	Select the headers you want to appear in the Journal Search and the order in which you want them to appear. By default this is set to US standard headers.

Table 32. Journal Search – Languages

Field	Description
<b>Latin diacritics handling</b>	<p>Select how diacritics should be handles when sorting journal titles in the Journal Search:</p> <ul style="list-style-type: none"> <li>■ USA – All characters with diacritics are sorted as characters without diacritics. For example é is sorted as e.</li> <li>■ German – All characters with umlaut are sorted as characters without diacritics + e. The German letter ß is sorted as sz.</li> <li>■ Danish/Norwegian – The following characters are sorted after Z: [Æ] [Ø] Å. All other diacritics are disregarded.</li> <li>■ Swedish – The following characters are sorted after Z: Å Ä Ö. The German letter ü is sorted as y. All other diacritics are disregarded.</li> </ul> <p>By default this is set to USA.</p>
<b>Select your country</b>	<p>Select your country. By default this is set to United States. This selection determines the display and sorting of results in the Journal Search interface.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>■ If China is defined as the country, the Simplified Chinese version of the title is displayed in the Journal Search for Chinese objects.</li> <li>■ If Taiwan is defined as the country, the Traditional Chinese version of the title is displayed in the Journal Search for Chinese objects.</li> </ul>

## Journals Quick Search

You can generate an HTML file in order to integrate an SFX A-Z List Quick Search box into your library home page or any other Web page.

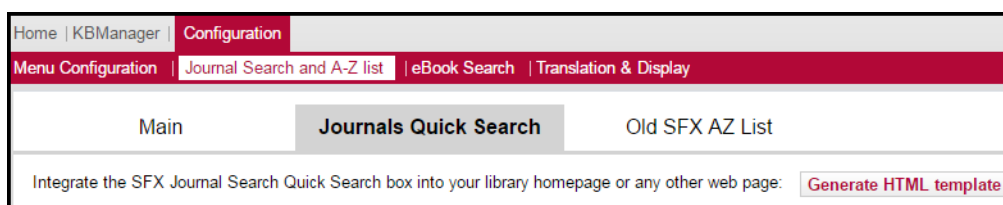


Figure 182: Journals Quick Search

**To integrate an SFX A-Z List Quick Search box into a Web page:**

- 1 Click **Generate HTML template**. The following dialog box opens:

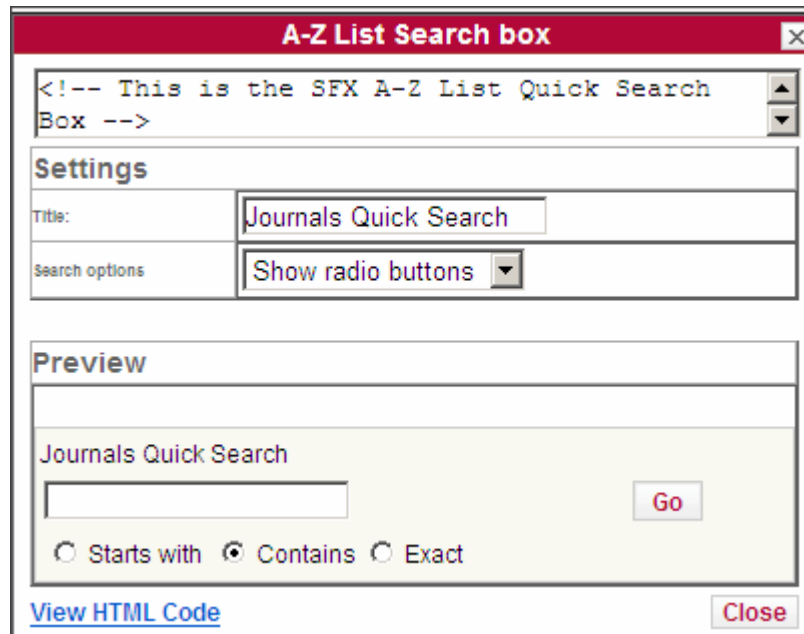


Figure 183: A-Z List Search Box

You can change the title of the box or select whether you want the search options to be displayed as radio buttons or as a drop-down list. You can see in the Preview section how the search box will appear in the Web page.

- 2 Click **View HTML Code**. The following is displayed:

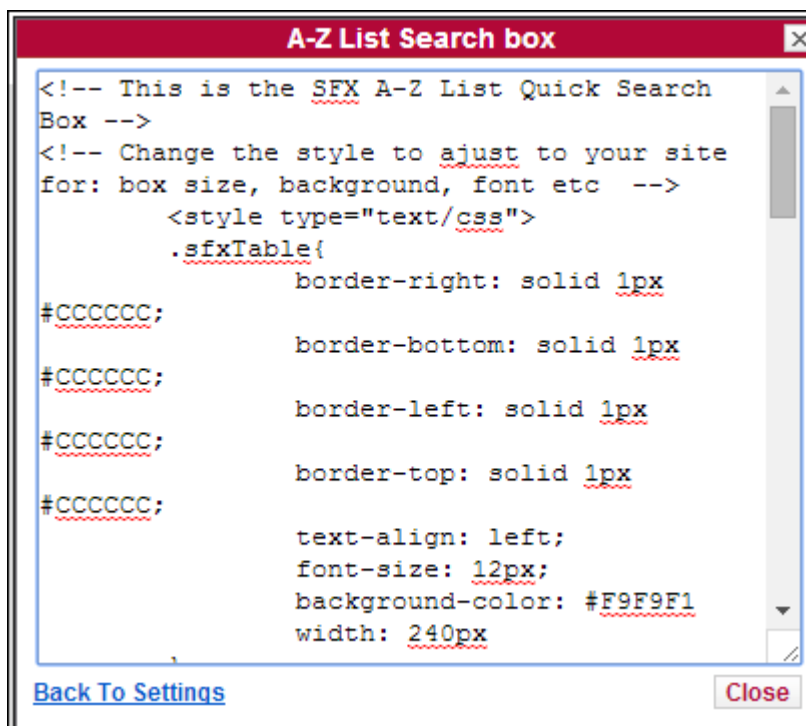


Figure 184: View HTML Code

- 3 Select all of the text in the text box and copy it into a Web page. Note that you need to scroll down to display all of the text or you can press Ctrl+A to select all of the text.

The SFX A-Z List Quick Search box is displayed in the Web page.

---

**NOTE:**

If the A-Z list has been configured to include both Latin and Pinyin headers, the Pinyin checkbox is automatically included in the Journal Quick Search.

---

## Configuring the Old A-Z List

Click **Journal Search** and **A-Z List** from the **Configuration** section of the **Setup & Administration** area and click the **Old SFX AZ List** tab.

The following sections are available:

- **SFX Journal Search Toolbar** on page 365
- **Journal Quick Search** on page 365
- **Display** on page 368
- **Content** on page 371

- [Language](#) on page 372
- [UI Language Control](#) on page 373

**NOTE:**

The default A-Z List profile includes all journals activated for the default institute (when institutes have been defined in the instance). To create an institute-specific A-Z List, create an A-Z custom profile. For more information, see [A-Z List Custom Profiles](#) on page 377.

### **SFX Journal Search Toolbar**

The SFX A-Z List browser toolbar is available as an add-on component for Microsoft Internet Explorer. It allows you to quickly search the SFX A-Z List from anywhere on the Web.

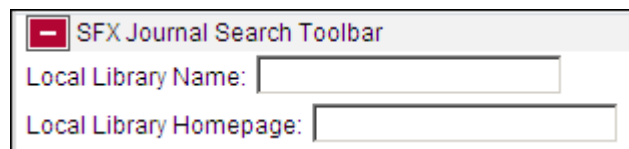


Figure 185: SFX Journal Search Toolbar

For information on configuring the SFX journal search toolbar, refer to the [A-Z List Browser Toolbar](#) section of the *SFX Advanced User's Guide*.

### **Journal Quick Search**

You can generate an HTML file in order to integrate an SFX A-Z List Quick Search box into your library home page or any other Web page.

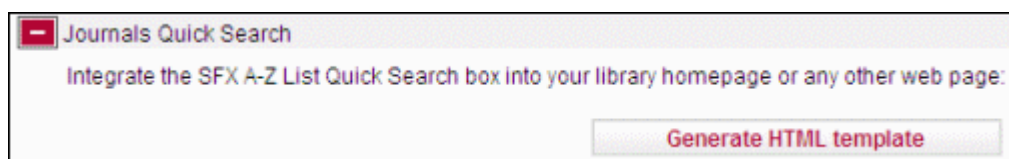


Figure 186: Journal Quick Search

**To integrate an SFX A-Z List Quick Search box into a Web page:**

- 1 Click **Generate HTML template**. The following dialog box opens:

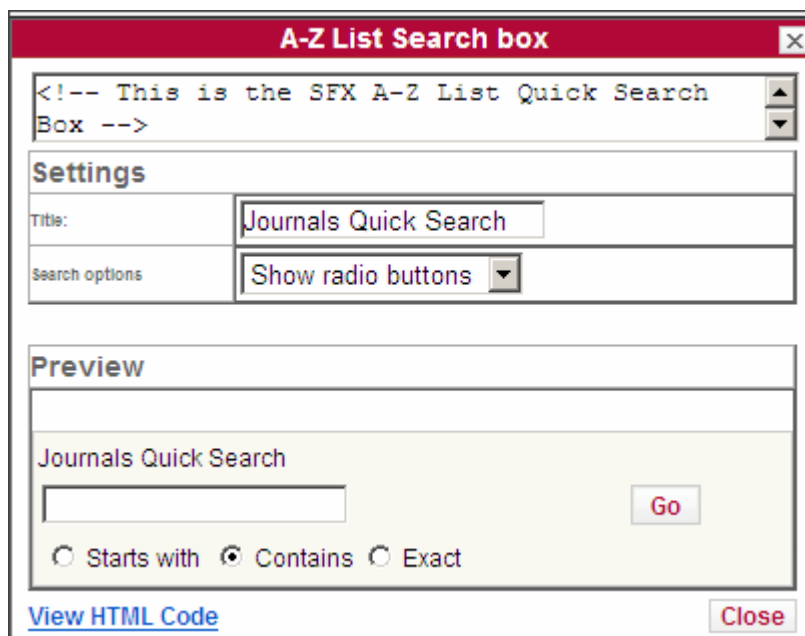


Figure 187: A-Z List Search Box

You can change the title of the box or select whether you want the search options to be displayed as radio buttons or as a drop-down list. You can see in the Preview section how the search box will appear in the Web page.

- 2 Click **View HTML Code**. The following is displayed:

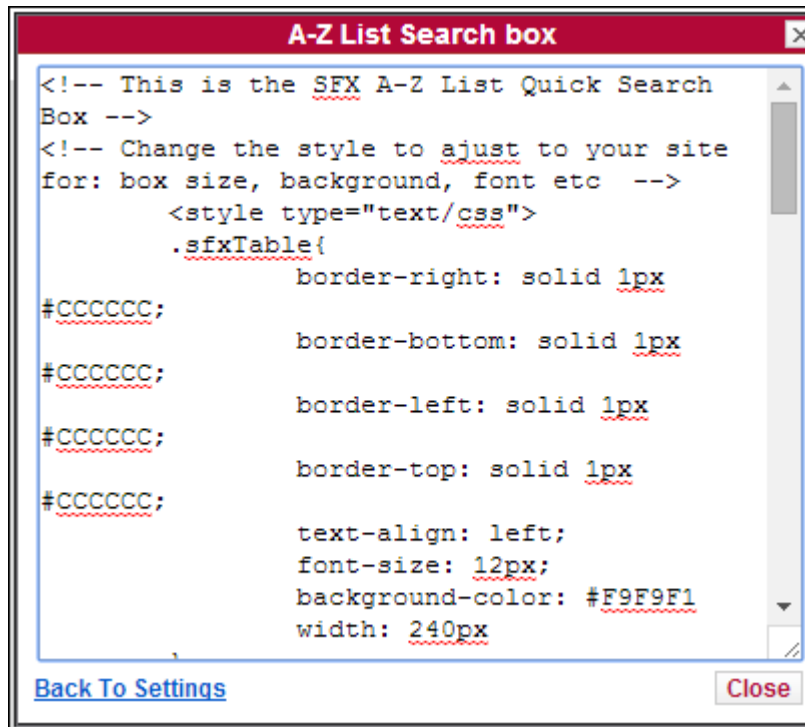


Figure 188: View HTML Code

- 3 Select all of the text in the text box and copy it into a Web page. Note that you need to scroll down to display all of the text or you can press Ctrl+A to select all of the text.

The SFX A-Z List Quick Search box is displayed in the Web page.

---

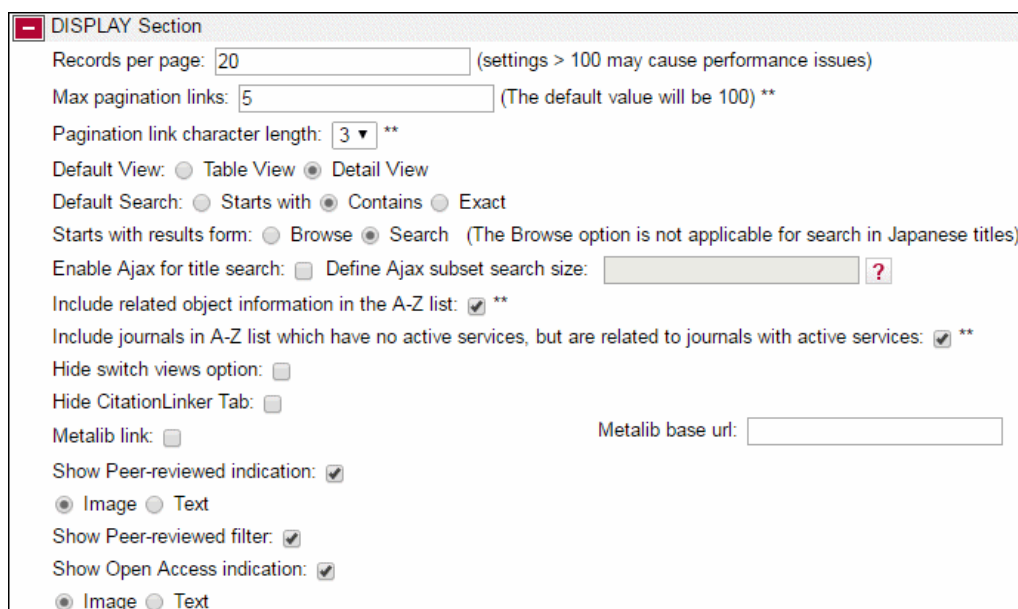
**NOTE:**

If the A-Z list has been configured to include both Latin and Pinyin headers, the Pinyin checkbox is automatically included in the Journal Quick Search.

---

## Display

From the Display section you can configure how the A-Z List is displayed. The following fields are available in this section:



The screenshot shows the 'DISPLAY Section' configuration interface. It includes the following fields and options:

- Records per page:  (settings > 100 may cause performance issues)
- Max pagination links:  (The default value will be 100) \*\*
- Pagination link character length:  \*\*
- Default View:  Table View  Detail View
- Default Search:  Starts with  Contains  Exact
- Starts with results form:  Browse  Search (The Browse option is not applicable for search in Japanese titles)
- Enable Ajax for title search:  Define Ajax subset search size:  ?
- Include related object information in the A-Z list:  \*\*
- Include journals in A-Z list which have no active services, but are related to journals with active services:  \*\*
- Hide switch views option:
- Hide CitationLinker Tab:
- Metalib link:  Metalib base url:
- Show Peer-reviewed indication: 
  - Image  Text
- Show Peer-reviewed filter:
- Show Open Access indication: 
  - Image  Text

Figure 189: A-Z List Display

The following table describes the fields of the Display section:



Table 33. A-Z List Display

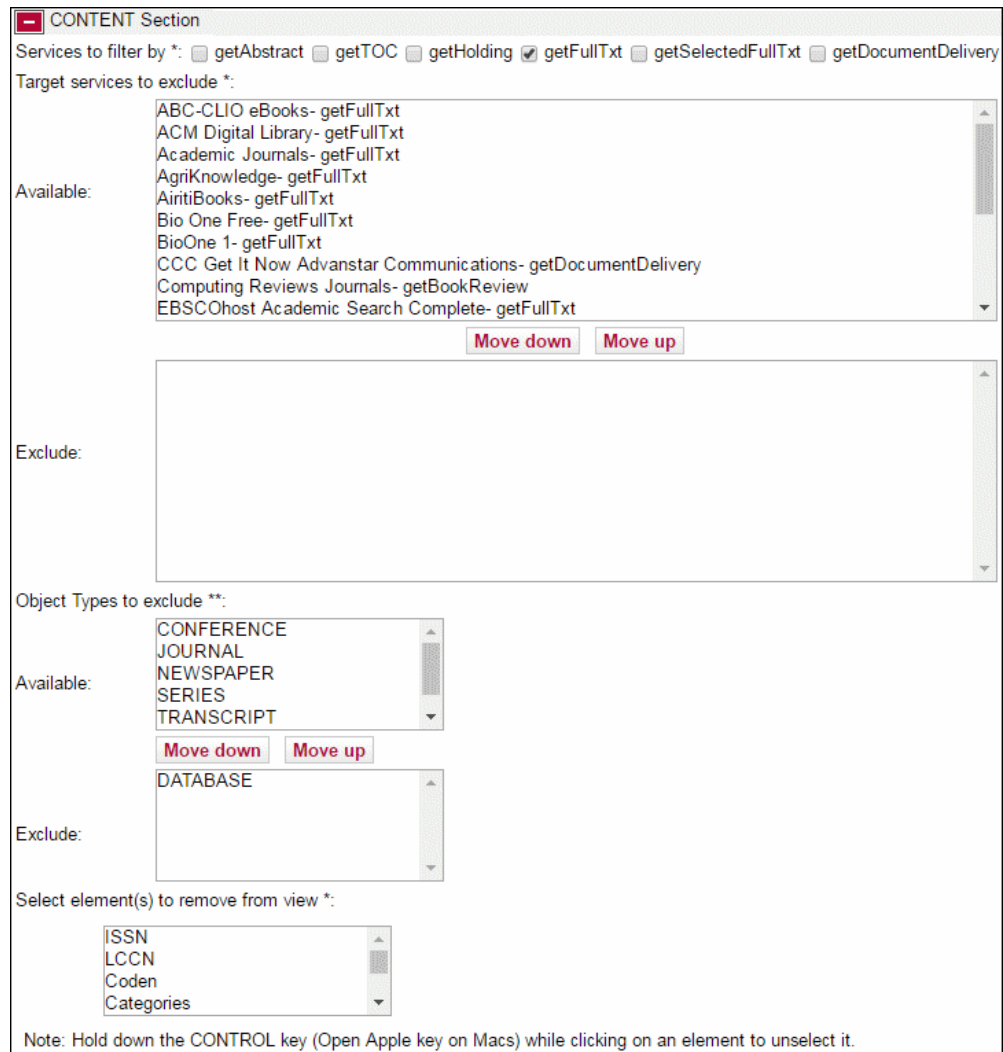
Field	Description
Records per page	The number of records you want displayed on each page.
Max pagination links	The number of pages displayed in the navigation section at the top of each page. For example, if 5 is entered, the navigation section looks like this: < 1 2 3 4 5 >
Pagination link character length	The length of the pagination links.
Default View	Select either <b>Table View</b> or <b>Detail View</b> .
Default Search	Select either <b>Starts with</b> , <b>Contains</b> , or <b>Exact</b> . By default this is set to <b>Contains</b> .
Starts with results from	Select either <b>Browse</b> or <b>Search</b> . For more information, see <b>Titles</b> on page 335.
Enable AJAX for title search	Select to enable the AJAX auto-complete feature. For more information about AJAX, see <b>AJAX Auto-Complete</b> on page 349.
Define AJAX subset search size	Define the AJAX subset search size.
Include related object information in the A-Z list	Select to include related object information in the A-Z List. For more information, see <b>Related Objects</b> on page 346. If selected, the following option is available.
Include journals in A-Z list which have no active services, but are related to journals with active services	Select to include journals in the A-Z list that have no active services, but are related to journals with active services. For more information, see <b>Related Objects</b> on page 346.
Hide switch views option	Hides the option to switch between detailed and table views.
Hide CitationLinker tab	Hides the CitationLinker tab.
MetaLib link	Select to push journal information to the MetaLib My eJournals list.
MetaLib base URL	Type the MetaLib base URL: <a href="http://&lt;metalibserver&gt;:8331/V">http://&lt;metalibserver&gt;:8331/V</a>

Table 33. A-Z List Display

Field	Description
<b>Show peer-reviewed indication</b>	Select to have an indication displayed if the journal is peer-reviewed. Select image or text to determine the type of indication displayed. For more information concerning the peer-reviewed indication, see the <b>Advanced Customization: HTML Template Files and Header Files</b> section of the <i>SFX Advanced User's Guide</i> .
<b>Show Peer-reviewed filter</b>	Select to have a check-box displayed that allows you to filter the results to include only peer-reviewed journals.
<b>Show Open Access indication</b>	Select to have an indication displayed if the journal is open access. Select image or text to determine the type of indication displayed.

## Content

From the Content section you can configure the content of the A-Z List results. The following fields are available in the Content section:



**CONTENT Section**

Services to filter by \*:  getAbstract  getTOC  getHolding  getFullTxt  getSelectedFullTxt  getDocumentDelivery

Target services to exclude \*:

Available:

- ABC-CLIO eBooks- getFullTxt
- ACM Digital Library- getFullTxt
- Academic Journals- getFullTxt
- AgriKnowledge- getFullTxt
- AiritiBooks- getFullTxt
- Bio One Free- getFullTxt
- BioOne 1- getFullTxt
- CCC Get It Now Advanstar Communications- getDocumentDelivery
- Computing Reviews Journals- getBookReview
- EBSCOhost Academic Search Complete- getFullTxt

Exclude:

Object Types to exclude \*\*:

Available:

- CONFERENCE
- JOURNAL
- NEWSPAPER
- SERIES
- TRANSCRIPT

Exclude:

DATABASE

Select element(s) to remove from view \*:

- ISSN
- LCCN
- Coden
- Categories

Note: Hold down the CONTROL key (Open Apple key on Macs) while clicking on an element to unselect it.

Figure 190: A-Z List Content

The following table describes the fields of the Content section:

Table 34. A-Z List Content

Field	Description
<b>Services to filter by</b>	Select the services to be displayed in the A-Z List.
<b>Target services to exclude</b>	Select the target services to exclude from the A-Z List.
<b>Object types to exclude</b>	Select the object types to exclude from the A-Z List.

Table 34. A-Z List Content

Field	Description
Select elements to remove from view	Select the elements you do not want displayed.

### Language

From the Language section you can configure the language of the A-Z List results. The following fields are available in the Language section:

**LANGUAGE Section**

User Interface Language Set:

<input type="checkbox"/> Catalan; Valencian	<input checked="" type="checkbox"/> English	<input checked="" type="checkbox"/> German	<input type="checkbox"/> Korean
<input type="checkbox"/> Chinese Simplified	<input type="checkbox"/> Estonian	<input type="checkbox"/> Greek	<input type="checkbox"/> Portuguese
<input type="checkbox"/> Chinese Traditional	<input type="checkbox"/> Faroese	<input type="checkbox"/> Hebrew	<input type="checkbox"/> Slovak
<input type="checkbox"/> Czech	<input type="checkbox"/> Finnish	<input type="checkbox"/> Icelandic	<input checked="" type="checkbox"/> Spanish
<input type="checkbox"/> Danish	<input checked="" type="checkbox"/> French	<input type="checkbox"/> Italian	<input type="checkbox"/> Swedish
<input checked="" type="checkbox"/> Dutch	<input type="checkbox"/> Galician	<input type="checkbox"/> Japanese	<input type="checkbox"/> Welsh

Select Default Language:

Select your country \*\*:

Select your headers \*\*:

Selected headers are:

Latin diacritics handling \*\*:  USA  German  Danish/Norwegian  Swedish

Figure 191: A-Z List Language

The following table describes the fields of the Language section:

Table 35. A-Z List Language

Field	Description
User Interface Language Set	Select the languages to appear in the A-Z List drop-down list. If none is selected, only the default language is available.
Select Default Language	Select the default language to be used by the A-Z List.
Select your country	Select your country. By default this is set to United States.
Select your headers	Select the headers you want to be displayed in the A-Z List and the order you in which you want them to be displayed. By default this is set to US standard headers.
Latin diacritic handling	<ul style="list-style-type: none"> <li>■ USA – All characters with diacritics are sorted as characters without diacritics. For example é is sorted as e.</li> <li>■ German – All characters with umlaut are sorted as characters without diacritics + e. The German letter ß is sorted as sz.</li> <li>■ Danish/Norwegian – The following characters are sorted after z: [Æ] [Ø] Å. All other diacritics are disregarded.</li> <li>■ Swedish – The following characters are sorted after z: Å Ä Ö. The German letter ü is sorted as y. All other diacritics are disregarded.</li> </ul> <p>By default this is set to USA.</p>

### UI Language Control

From the UI Language Control section you can define the writing system of the objects that are displayed in the A-Z List.

There are two modes of behavior:

- **SFX 3 behavior** – the A-Z List only displays objects with the same writing system as the search term. Objects whose writing system is different than the search term are not displayed – even if the title is in the writing system of the search term. For example, if you enter a search term in English, the A-Z List displays objects whose language is written in a Latin writing system such as English, French, or German – but not objects written in the Chinese, Arabic, or Greek writing systems – even if the title of the object has been translated into a Latin writing system language.

- **SFX 4 behavior** – you can have the A-Z List search for objects whose writing system is different than the writing system of the search term, but whose title is in the same writing system as the search term.

### UI Control Visibility Hidden for SFX 3 Behavior

The following fields are available in the UI Language Control section with UI control visibility hidden for SFX 3 behavior:

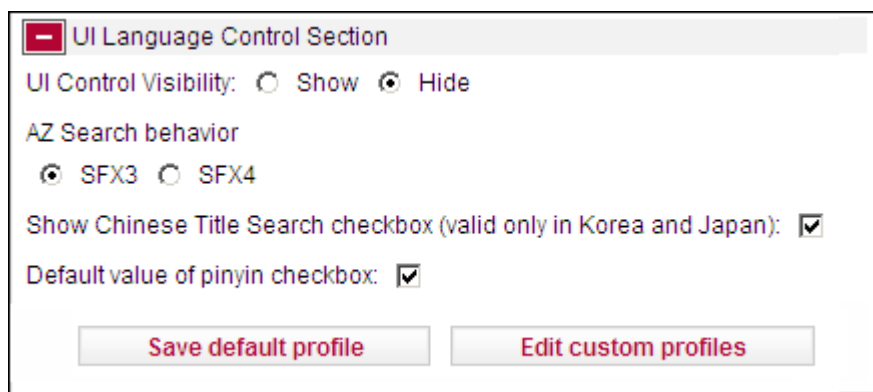


Figure 192: A-Z List UI Language Control SFX 3 Behavior

The following table describes the fields of the UI Language Control section with UI control visibility hidden for SFX 3 behavior:

Table 36. A-Z List UI Language Control SFX 3 Behavior

Field	Description
<b>UI Control Visibility</b>	Show or hide the ability in the A-Z List to limit searches to specific languages.
<b>AZ Search Behavior</b>	Select whether the A-Z List has the SFX 3 or SFX 4 behavior.
<b>Show Chinese Title Search Checkbox</b>	Select to display the Chinese Title Search checkbox in the A-Z List. Select this checkbox if the A-Z profile country setting is Korea or Japan.  This checkbox allows the user to limit the title search to search only Chinese titles.
<b>Default Value of Pinyin Checkbox</b>	Select to have the Pinyin checkbox in the A-Z List selected by default. The Pinyin checkbox is displayed only if the A-Z List uses both Pinyin and Latin headers.

### UI Control Visibility Hidden for SFX 4 Behavior

The following fields are available in the UI Language Control section with UI control visibility hidden for SFX 4 behavior:

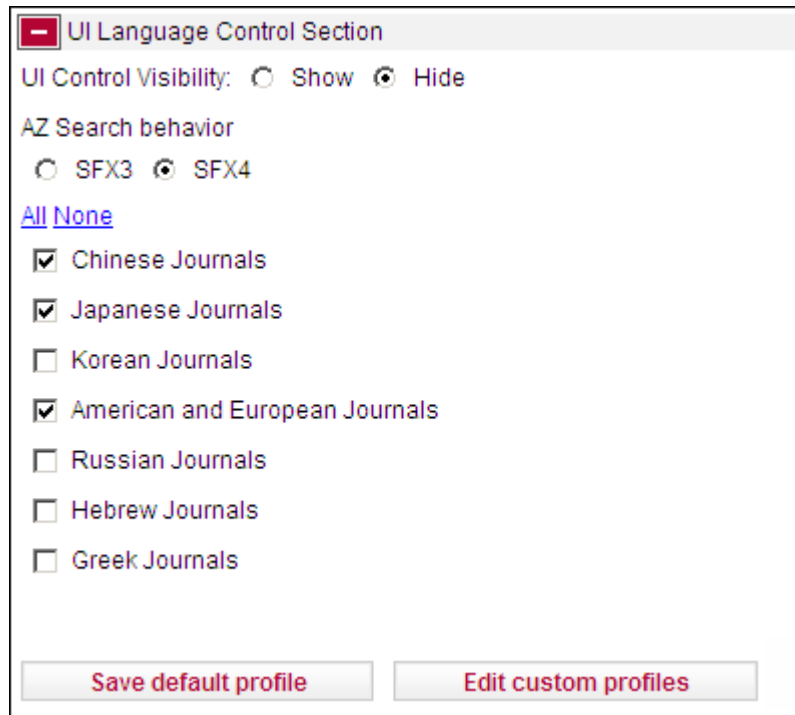


Figure 193: UI Language Control SFX 4 Behavior

The following table describes the fields of the UI Language Control section with UI control visibility hidden for SFX 4 behavior:

Table 37. UI Language Control SFX 4 Behavior

Field	Description
<b>UI Control Visibility</b>	Show or hide the ability in the A-Z List to limit searches to specific languages.
<b>AZ Search Behavior</b>	Select whether the A-Z List has the SFX 3 or SFX 4 behavior.
<b>Languages</b>	Select the languages of the results displayed in the A-Z List.

**NOTE:**

It is recommended to select all writing systems or a selection of writing systems for which you want your end users to be able to search. If a specific writing system is not selected, the A-Z List will not display results in those writing systems, even if they exist. Do this only for a specific profile, or where you do not want the titles of a specific writing system to be searchable.

## UI Control Visibility Displayed

The following fields are available in the UI Language Control section with UI control visibility displayed:

The screenshot shows the 'UI Language Control Section' with a 'UI Control Visibility' toggle set to 'Show'. It features two columns of language options. The left column, titled 'Drag to the right to show in UI control:', contains 'Hebrew Journals', 'Greek Journals', and 'Korean Journals', each with an unchecked 'Checked by default' checkbox. The right column, titled 'Order selected scripts:', contains 'Chinese Journals', 'Japanese Journals', 'Journals in not listed languages', 'Russian Journals', and 'American and European Journals', with checkboxes for 'Checked by default' that are checked for Chinese, Japanese, and the 'not listed languages' category, and unchecked for Russian. At the bottom are 'Save default profile' and 'Edit custom profiles' buttons.

Figure 194: UI Language Control with UI Control Visibility Displayed

The following table describes the fields of the UI Language Control section with UI Control Visibility Displayed:

Table 38. UI Language Control section with UI Control Visibility Displayed

Field	Description
<b>UI Control Visibility</b>	Show or hide the ability in the A-Z List to limit searches to specific languages.
<b>Drag to the right to show in UI control</b>	Drag a language to the right side to have the language option displayed in the A-Z List.
<b>Checked by Default</b>	Select to have the checkbox selected by default in the A-Z List.
<b>Order Selected Scripts</b>	Drag the languages to be displayed in the desired order in the A-Z List.



**NOTE:**

It is recommended to select all writing systems or a selection of writing systems for which you want your end users to be able to filter.

The following is an example of the A-Z List with UI language control displayed:

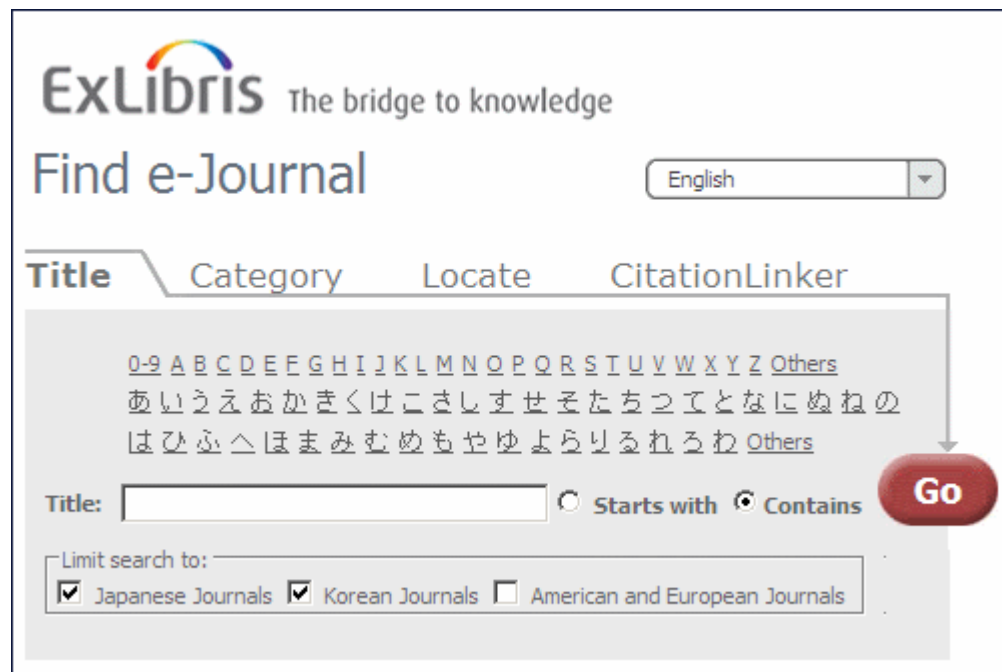


Figure 195: A-Z List with Language Control Displayed

## A-Z List Custom Profiles

It is possible to define A-Z profiles (for example, in a consortium environment, for the different institutes defined in a particular instance). To do this, click **Edit custom profiles**. The following dialog box opens, displaying the available A-Z List profiles.

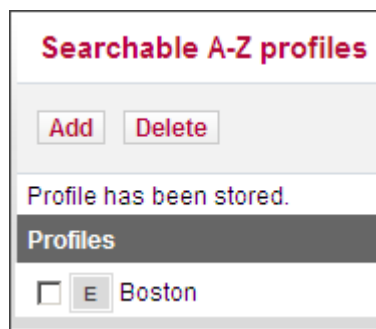


Figure 196: A-Z Profiles

For custom profiles, it is possible to define the same parameters that exist for the DEFAULT profile. Additionally, you need to define a profile name that is used in the URL when accessing the A-Z List for this profile. In the example above, the profile named **Boston** was created.

---

**NOTE:**

The profile name cannot include spaces or punctuation – only alphanumeric characters.

---

The URL to access this A-Z List is:

[http://<sfx\\_server>:<port>/<instance>/az/boston](http://<sfx_server>:<port>/<instance>/az/boston)

It is possible in the A-Z List to include institute information as part of the SFX base URL.

---

**NOTE:**

When multiple institutions are defined within same profile, configuration should be done by IP ranges and not by including the institution name in the URL.

---

The A-Z URL is in the following format:

[http://<SFX\\_base\\_URL><-institute>/az/<institute>](http://<SFX_base_URL><-institute>/az/<institute>)

This institute information is retained when searching or browsing the A-Z List and when using outside links such as the SFX menu.

In the additional profiles, it is possible to add, delete, and edit profiles for one institute, multiple institutes, or groups. This can be done in the **Content** section of each additional profile:



Figure 197: Institutes in the A-Z List

Select an institute from the box to have the SFX A-Z List function like the SFX menu, so that selecting an institute results in an SFX A-Z List that contains everything active for this institute, for groups with which it is affiliated, or active by default.

Inactive settings are taken into account. For example, inactive settings for an institute or a higher-ranked group override active defaults or lower group settings. With this option selected, the DEFAULT institute cannot be selected independently because it is included by inheritance when selecting any other institute or group.

If more than one institute or group is selected, the A-Z list includes anything active for the institutes, groups, and defaults selected. Inactive institutes and group settings are ignored. This option is similar to the way the current A-Z List is calculated.

For more information about institutes, refer to the **Institute Feature** section of the *SFX Advanced User's Guide*.

## A-Z List for Mobile Devices

The A-Z list and eBook search have been optimized for display on mobile devices. The mobile interface differs in several ways from the standard A-Z list:

- There are no Title, Category, or Citationlinker tabs in the mobile A-Z list
- Results are displayed only in Detail view, using a collapsible result display.

---

### NOTE:

The mobile interface has been tested on the following devices:

Nexus 5, LG G3, LG G2, iPhone 4s, iPad 2, Galaxy Tab 2

---

## Overview

You access the interface just as you would the standard interface – the mobile device is automatically detected. The configuration settings that are set for the standard interface also apply to the mobile interface. However, the mobile interface differs in several ways from the standard A-Z list.

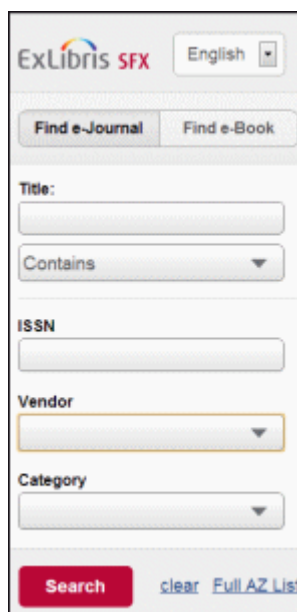
The image shows a mobile search interface for ExLibris SFX. At the top left is the logo 'ExLibris SFX' and a language dropdown menu set to 'English'. Below the logo are two buttons: 'Find e-Journal' and 'Find e-Book'. The main search area contains several input fields: 'Title:' with a text box, a 'Contains' dropdown menu, 'ISSN' with a text box, 'Vendor' with a dropdown menu, and 'Category' with a dropdown menu. At the bottom of the search area are three buttons: a red 'Search' button, a blue 'clear' button, and a blue 'Full AZ List' button.

Figure 198: Mobile A-Z List

You can search for an e-journal or e-book by title, ISSN, ISBN, vendor, or category. To display the standard A-Z list interface, click **Full AZ List**.

## Mobile A-Z List Result Display

The results of the mobile A-Z list are displayed in detail view:

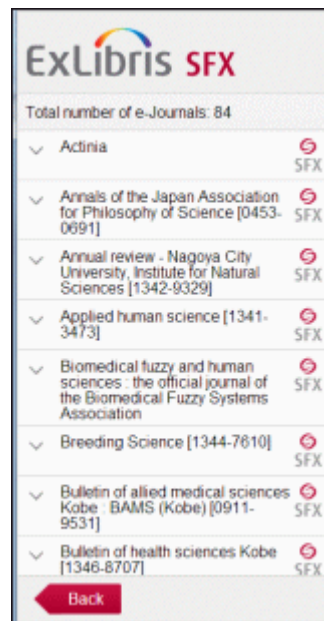


Figure 199: Mobile A-Z List Results

Click the arrow next to a journal to display journal details and availability information. Click the SFX button to display the SFX menu. Direct link functionality is also available in the mobile interface if it is configured.

For more information concerning the A-Z list, see [Journal Search and A-Z List](#) on page 317.

## eBook Search

The eBook Search allows you to search for ebooks with active full text portfolios. You can access this feature as a stand-alone interface or you can configure it to appear in a combined interface with the A-Z list.

There are two versions of the eBook Search - the new version and the old one. It is recommended that you use the new version. The following section describes the new version of the eBook Search. For information on the old version of the eBook Search see [eBook Search – Old Version](#) on page 397.

## eBook Search – New Version

The following section describes the new version of the eBook Search.

The following information is retained when moving between the A-Z eJournal List and the eBook Search:

- The tab that was last selected in the A-Z eJournals List
- The last search performed in each tab of the A-Z eJournals List
- The last search performed in A-Z eBooks Search
- Whether table view or detail view was last selected in the eJournals or eBook Search (in case the default view was not selected)

---

**NOTE:**

Click the **Cookie Policy** link at the bottom of the eBook Search to display a description of the SFX Privacy Policy and how Ex Libris uses cookies.

---

## Accessing the eBook Search

To access the eBook Search, type the following URL in your Web browser:

`http://<sfx_server>:<port>/<instance>/ebooksearch`

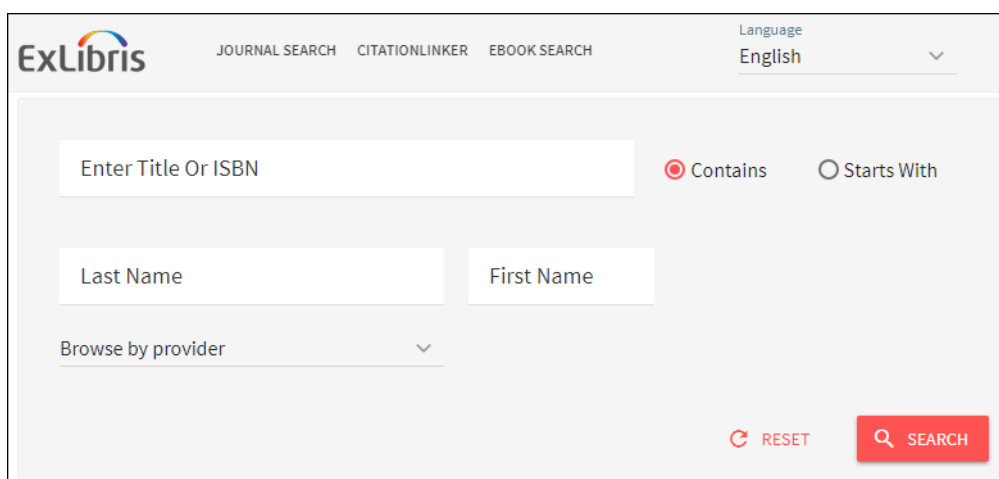


Figure 200: eBook Search

You can add the following parameters to the eBook Search URL:

- `lang=<3digit_language_code>`  
This parameter is used to present the appropriate language eBook Search. The accepted three-digit language codes are all ISO 639-2 three letter codes (plus Chi-simplified and chi-traditional).  
For example: <http://demo.exlibrisgroup.com:3210/demo/az-books/?lang=eng>
- `embedded=ML`  
This parameter removes the header image from the eBook Search display.

---

**NOTE:**

This parameter cannot be used to integrate the eBook Search with MetaLib (an option that does exist for the A-Z eJournals list).

---

## Searching eBooks

You can perform a search based on the following parameters:

- Title or ISBN – the book title or its ISBN. You can perform the search according to the following options:
  - Starts with
  - Contains
  - Exact
- Author Last Name and First Name – only the last name is required. Note that not all books in the SFX KnowledgeBase currently have author information loaded. When performing an author search, books without authors are not included in the search result. You can configure the author field to not be displayed. For more information, see [Configuring the eBook Search – New Version](#) on page 388.

---

**NOTE:**

The Last name box can also be used to search for corporate and meeting names.

---

- Provider – select a provider (vendor) from the drop-down list. More than one provider can be selected.

---

**NOTES:**

- Only ebooks with active `getFullTxt` or `getSelectedFullTxt` services (not `getAbstract`, `getTOC`, and `getHolding` services) are included in the eBook Search.
  - Threshold and coverage information is not included in the eBook Search.
  - Local title override for books is not included in the eBook Search.
  - Local book objects are not included in the local instance eBook Search if they are created in the shared instance as part of the set-up of local/shared instances in consortia model 3.
- 

## eBook Search Result Display

After you perform a search, the eBook Search displays the results in Table view or Detail view. For information on determining which view is displayed by default, see [Configuring the eBook Search – New Version](#) on page 388.

## Table View

The following is an example of Table view:



860 Results		191 - All	Alt - Arc	Arc - Bed	Bel - Bla	Bod - Cal	Can - Cha	Che - Chu	>
1917 : beyond the Western Front : History of Warfare	[90-04-17139-8]								
Beckett, Ian Frederick William									
Abraham Bar Hiyya on Time, History, Exile and Redemption	[90-04-27035-3]								
Töyrylä, Hannu									
Abraham Kuyper: An Annotated Bibliography 1857-2010	[90-04-21139-X]								
Kuipers, Tjitze									
Accentual History of the Japanese and Ryukyuan Languages	[1-901903-63-X]								
Shimabukuro, Moriyō									
The adaptable peasant : agrarian society in western Sri Lanka under Dutch rule, 1740-1800 : TANAP monographs on the history of Asian-European interaction	[90-04-16508-8]								
Dewasiri, Nirmal Ranjith									

Figure 201: eBook Search Table View

In Table view, the following information is displayed:

- Book titles (Main, Abbreviated, Uniform, Alternative, Translation) – Click to skip the SFX menu and display full text (if directLink is turned on).
- ISBN (hardback, paperback, electronic)
- Author information

## Detail View

The following is an example of Detail view:



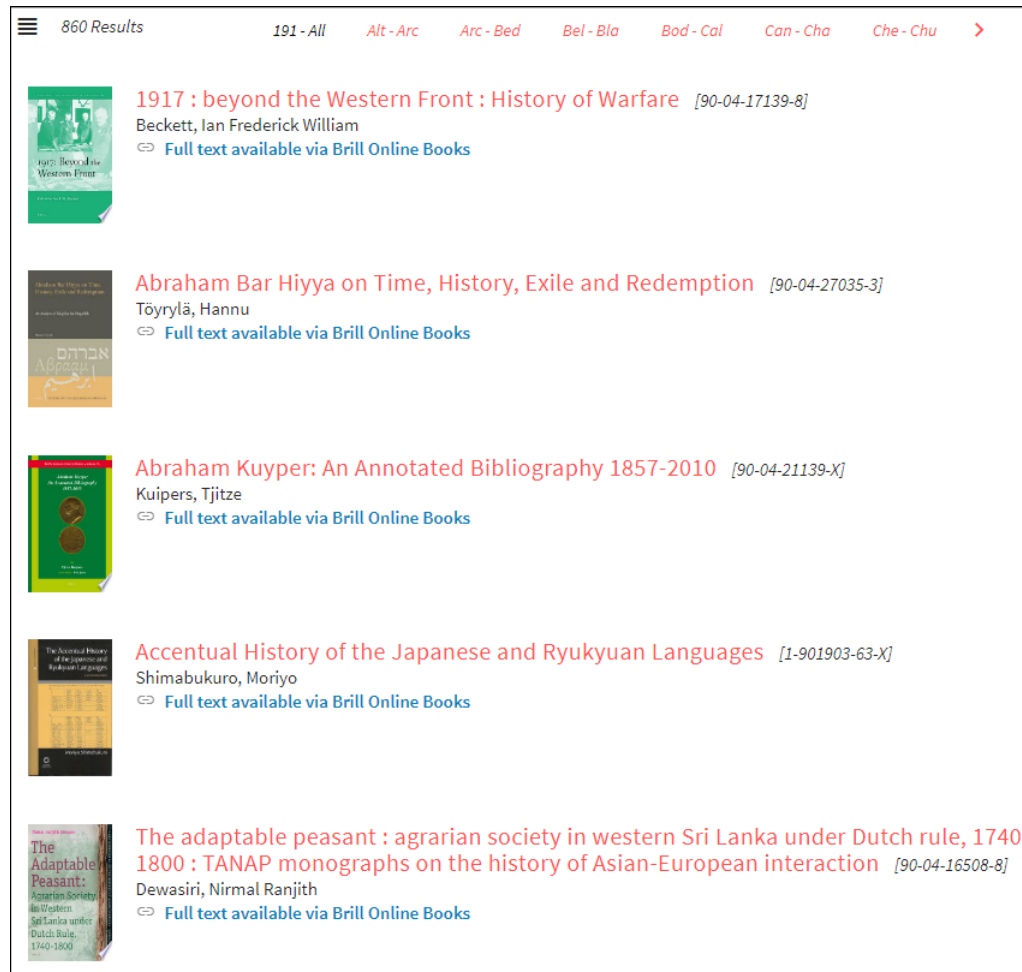


Figure 202: eBook Search Detail View

In Detail view, the following information is displayed:

- **Thumbnail** – An image of the book's cover. (If this is configured to be displayed).
- **Book Title** – Click to either view the Full view or SFX menu, or to skip the SFX menu and display full text. Link behavior depends on configuration and whether directLink is turned on.
- **ISBN** (hardback, paperback, electronic)
- **Author information**
- **Availability Statement** – Click the target name to skip the SFX menu and display full text (if directLink is turned on). The OpenURL link includes the object portfolio ID to ensure the SFX menu displays only this target. The Object portfolio threshold information is displayed in the Availability

Statement. Note that object portfolio thresholds (of the type parsedDate and TimeDiff) are included, but not target or target service thresholds.

By default, the following information is included in Detail view:

- Book Title (Main, Abbreviated, Uniform, Alternative, Translation)
- ISBN (hardback, paperback, electronic)
- Author information
- Imprint
- Availability information
- Note
- Authentication
- Book History (with related book information)

### Full View

You can click the title of a book that is displayed in Table View or Detail view. Book information is displayed in a side pane – Full view.

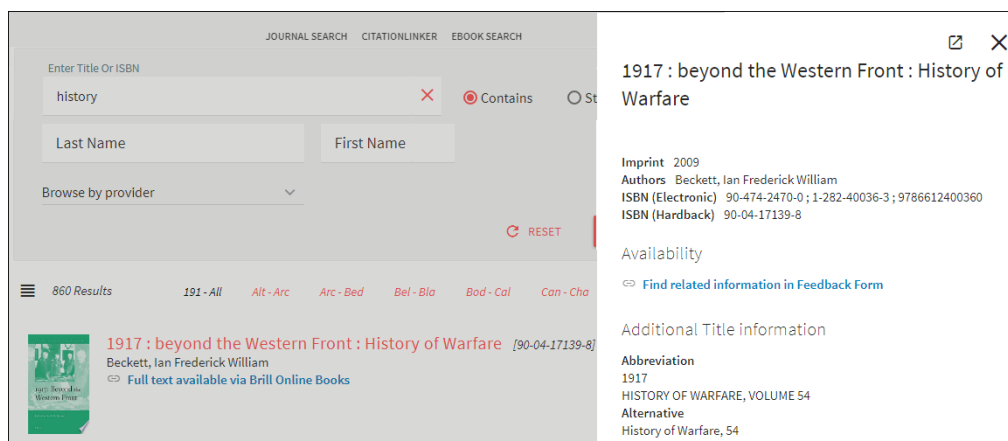


Figure 203: Full View

In Full view, the following information is displayed:

- Book titles
  - Main
  - Abbreviated
  - Translation
  - Uniform
  - Alternative

- **ISBN** – The ISBN of the book.
- **LCCN** – **The Library of Congress number**
- **CODEN**
- **Availability Statement** – Click the target name to skip the SFX menu and display full text (if directLink is turned on). The OpenURL link includes the Object portfolio ID to ensure the SFX menu displays only this target. The Object portfolio threshold information is displayed in the Availability Statement. Note that object portfolio thresholds (of the type parsedDate and TimeDiff) are included, but not target or target service thresholds.
- **Categories** – The categories to which the Journal belongs
- **Book History** – displays related object information

#### **Additional Title information**

- ISBN (hardback, paperback, electronic)
- Author information
- Imprint
- Availability information
- Note
- Authentication
- Book History (with related book information)

This option is available for the eBook Search, because the book for which you are searching may be unavailable electronically, since only a small percentage of books have been converted to electronic format. If a search is unsuccessful, click this link to view an SFX menu with the metadata information from the original search without any additional metadata enhancements from the SFX database.

## **Building the eBook Search**

The eBook Search uses a dedicated Solr index. Within the Solr index, each instance has its own Solr core. The Solr index is build and updated using the following two sources of information:

- the SFX databases (both global and local)
- the monograph RSI (for activation information)

The Solr index (and RSI index for monographs) is built using the Server Admin Utility in the following situations:

- Before you can start using the eBook Search for the first time
- After changes in the SFX KnowledgeBase – for example, activation or eBook Search configuration changes

For more information, refer to the **A-Z and eBook Search Indexes** and the **Rapid Service Indicator** sections of the *SFX System Administration Guide*.

## Configuring the eBook Search – New Version

Click **eBook Search** from the **Configuration** section of the **Setup & Administration** area. The following sections are available:

- **General** on page 388
- **Content** on page 391
- **Design** on page 393
- **Search/Results** on page 394
- **Languages** on page 396

### **General**

Click **General** to display the following page:

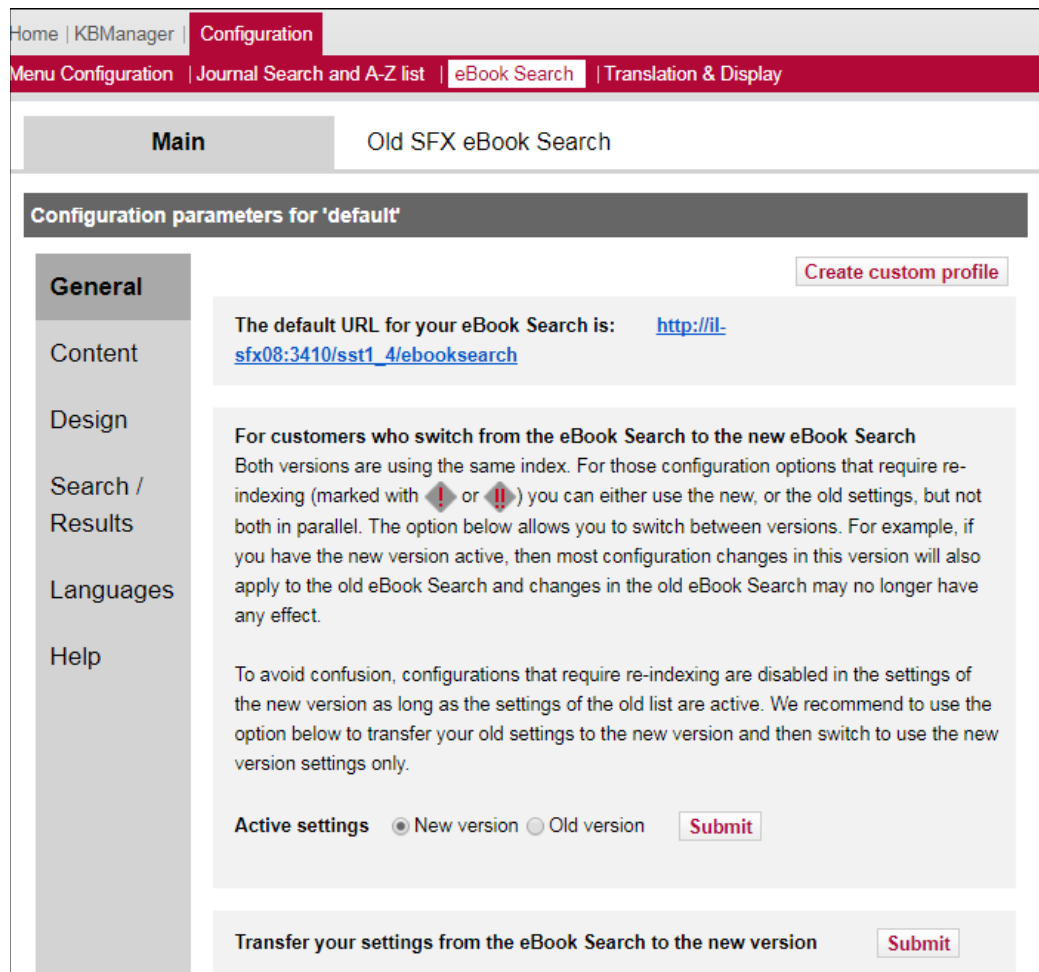


Figure 204: eBook Search – General

Table 39. eBook Search – General

Field	Description
Select Profile	Select which profile is affected by changes made in the Content, Design, Search/Results, and Languages sections.
Create Custom Profile	Click <b>Create custom profile</b> to display the Profile name field
Profile Name	Enter a name for the new profile and click <b>Create Profile</b> . See
Default URL for your eBook Search	The default URL for your eBook Search that you can integrate into a Web page.

Table 39. eBook Search – General

Field	Description
Active Settings	If you want to switch to the new version of the eBook Search, select <b>New Version</b> and click <b>Submit</b> to make the new version settings your active settings.
Transfer your settings from the old eBook Search to the new version	Click <b>Submit</b> to switch to the new version settings.

---

**NOTE:**

If you edit a profile, you must switch to the default profile for the **Transfer your settings from the old AZ list to the new version option** to appear.

---

Both the new version of the eBook Search and the old version use the same index. For those configuration options that require re-indexing, you can either use the new or the old settings, but not both in parallel. The following symbols indicate the areas that require reindexing:

! – Requires rebuild of eBook Search index only

!! – Requires rebuild of RSI and eBook Search indexes

It is possible to define eBook Search profiles (for example, in a consortium environment, for the different institutes defined in a particular instance). To do this, click Create custom profile from the General section. The profile name field is displayed. Enter a name for your custom profile and click Create profile.

---

**NOTE:**

The profile name cannot include spaces or punctuation – only alphanumeric characters.

---

For custom profiles, it is possible to define the same parameters that exist for the DEFAULT profile. Additionally, you need to define a profile name that is used in the URL when accessing the eBook Search for this profile. For example, if the profile named Boston is created, the URL to access this eBook Search is:

[http://<sfx\\_server>:<port>/<instance>/ebooksearch/boston](http://<sfx_server>:<port>/<instance>/ebooksearch/boston)

It is possible in the eBook Search to include institute information as part of the SFX base URL.

---

**NOTE:**

When multiple institutions are defined within same profile, configuration should be done by IP ranges and not by including the institution name in the URL.

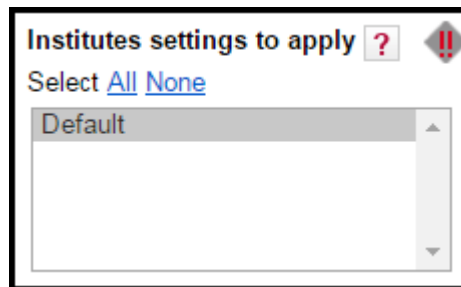
---

The eBook Search URL is in the following format:

[http://<SFX\\_base\\_URL><-institute>/ebooksearch/<institute>](http://<SFX_base_URL><-institute>/ebooksearch/<institute>)

This institute information is retained when searching or browsing the eBook Search and when using outside links such as the SFX menu.

In the additional profiles, it is possible to add, delete, and edit profiles for one institute, multiple institutes, or groups. This can be done in the Content section of each additional profile:



Institutes in the eBook Search

Select an institute from the box to have the eBook Search function like the SFX menu, so that selecting an institute results in an eBook Search that contains everything active for this institute, for groups with which it is affiliated, or active by default.

Inactive settings are taken into account. For example, inactive settings for an institute or a higher-ranked group override active defaults or lower group settings. With this option selected, the DEFAULT institute cannot be selected independently because it is included by inheritance when selecting any other institute or group.

If more than one institute or group is selected, the eBook Search includes anything active for the institutes, groups, and defaults selected. Inactive institutes and group settings are ignored. This option is similar to the way the current eBook Search is calculated.

For more information about institutes, refer to the Institute Feature section of the *SFX Advanced User's Guide*.

## Content

From the Content section you can configure the content of the eBook Search results. The following fields are available from the Content section:

Home | KBManager | Configuration

Menu Configuration | Journal Search and A-Z list | eBook Search | Translation & Display

Main Old SFX eBook Search

Configuration parameters for 'default'

General

Content

Design

Search / Results

Languages

Help

Submit

Specify services included ? !

Available  
getSelectedFullTxt

Included  
getFullTxt

Exclude targets ?

Available  
ACLS Humanities eBook- getFullTxt  
ACM Digital Library- getFullTxt  
e-libro Catedra- getFullTxt

Excluded

Object types included in the display (de-select for exclusion) ?

AUDIO  BOOK  CD  DISSERTATION  DOCUMENT  MANUSCRIPT  PROCEEDING  
 REPORT  SCORE  VIDEO

Elements included in display (de-select for exclusion) ?

Title  AbbrevTitle  AlternativeTitle  UniformTitle  TranslationTitle  ISBN (print-Hardback)  
 ISBN (print-Paperback)  ISBN (Electronic)  Author  Imprint  Availability  Note  Authentication

Inclusion of related objects (incl. pre-ceding and succeeding titles) ?

Include related object information in the eBook Search ? !

Include titles in eBook Search which have no active services, but are related to titles with active services ? !

Submit

Figure 205: eBook Search Content

**NOTE:**

Configurations that require re-indexing are grayed-out if the old eBook Search is active.

The following table describes the fields of the Content section:



Table 40. eBook Search – Content

Field	Description
<b>Specify services included</b>	<p>Select the services to be displayed in the eBook Search.</p> <hr/> <p><b>NOTE:</b> The targets displayed in the Available box contain all the active targets (including journal targets). However, in the eBook Search index, targets without active books are excluded from the index, including journal targets listed in the Available box. A maximum of 50 targets can be listed in the Excluded box.</p> <hr/>
<b>Exclude Targets</b>	Select the target services to exclude from the eBook Search.
<b>Object types included in the display</b>	Select the object types to include in the eBook Search.
<b>Elements included in display</b>	Select the elements you want displayed.
<b>Include related object information in the eBook Search</b>	Select to include related object information in the eBook Search.
<b>Include titles in eBook Search which have no active services, but are related to titles with active services</b>	Select to include journals in the eBook Search that have no active services, but are related to journals with active services.

### Design

The following fields are available in the Design section:

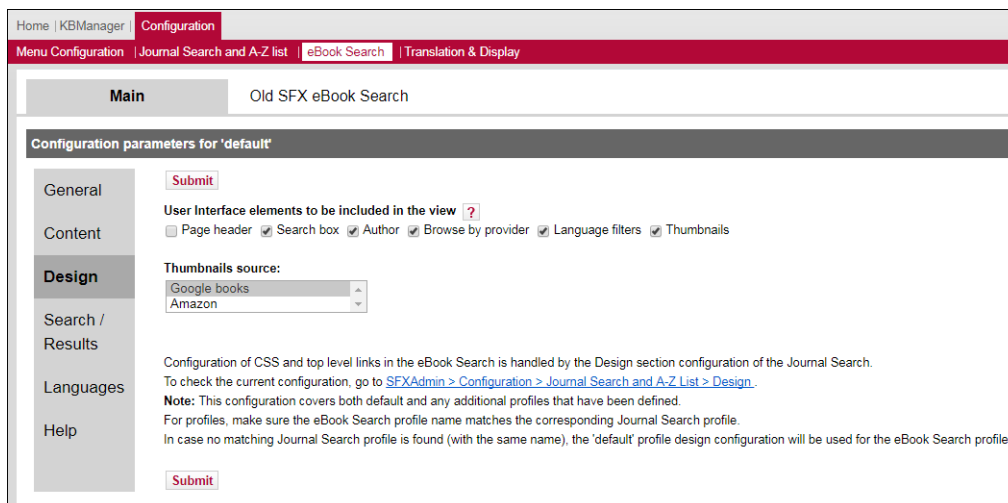


Figure 206: eBook Search – Design

**NOTE:**

To make CSS changes or to configure the top banner of the eBook Search (including the top level links), use **SFXAdmin > Configuration > Journal Search and A-Z List > Design**.

The following table describes the fields of the Design section:

Table 41. eBook Search – Design

Field	Description
User Interface elements to be included in the view	Select the UI elements you want to appear in the eBook Search.
Thumbnails Source	The source of the eBook Search thumbnails.

**Search/Results**

The following fields are available in the Search/Results section:

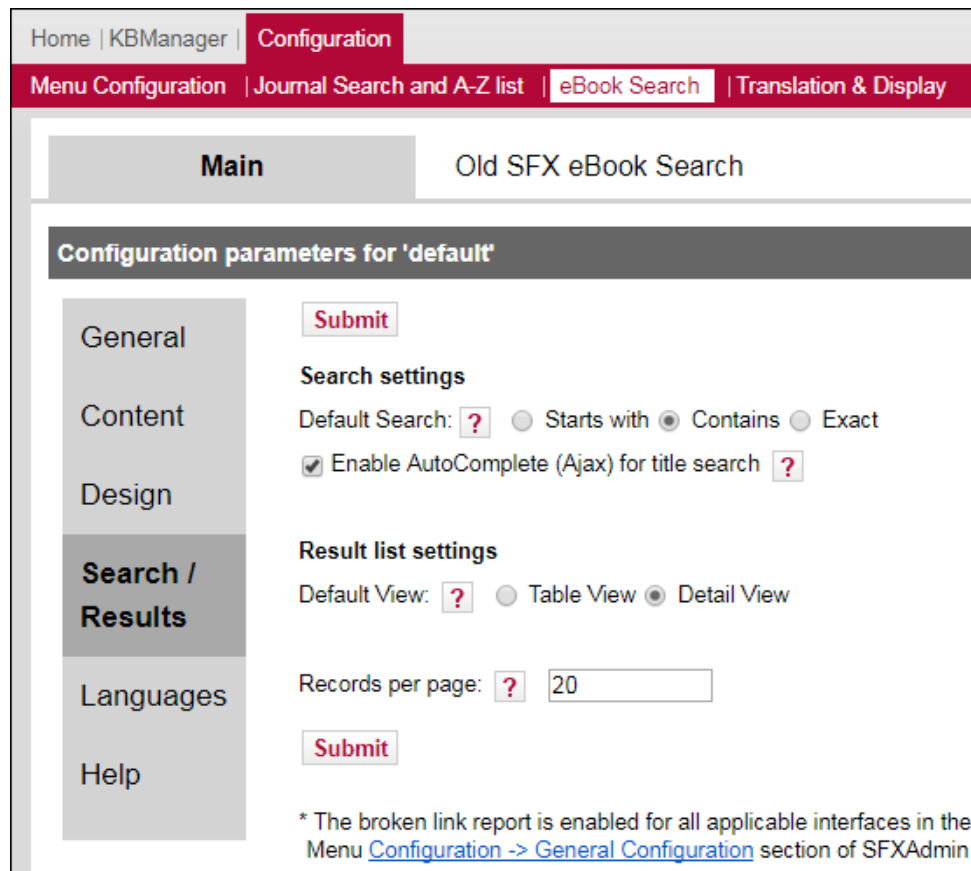


Figure 207: eBook Search – Search/Results

The following table describes the fields of the Search/Results section:

Table 42. Journal Search – Search/Results

Field	Description
Default Search	Select either <b>Starts with</b> , <b>Contains</b> , or <b>Exact</b> . By default this is set to <b>Contains</b> .
Enable AutoComplete (Ajax) for title search	Select to enable the AJAX auto-complete feature. For more information about AJAX, see <a href="#">AJAX Auto-Complete</a> on page 349.
Default View	Select either <b>Table View</b> or <b>Detail View</b> .
Records per page	The number of records you want displayed on each page.

---

**NOTE:**

The broken link report is enabled for all applicable interfaces in the **Menu Configuration > General Configuration** section of the SFX Admin Center.

---

## Languages

From the Language section you can configure the language of the eBook Search results. The following fields are available in the Language section:

The screenshot shows the SFX Admin Center configuration interface. At the top, there is a navigation bar with 'Home | KBManager | Configuration' and a sub-menu 'Menu Configuration | Journal Search and A-Z list | eBook Search | Translation & Display'. Below this, there are two tabs: 'Main' and 'Old SFX eBook Search'. The 'Old SFX eBook Search' tab is active, showing 'Configuration parameters for 'default''. On the left, there is a vertical menu with options: 'General', 'Content', 'Design', 'Search / Results', 'Languages' (highlighted), and 'Help'. The main content area has a 'Submit' button at the top. Below it, there is a text instruction: 'To configure the language dropdown in the eBook Search header, use [SFXAdmin > Configuration > Journal Search and A-Z List > Languages](#).' This is followed by a 'Latin diacritics handling' section with a help icon, a warning icon, and radio buttons for 'USA', 'German', 'Danish/Norwegian', and 'Swedish'. Below that is a 'Select your country' section with a help icon, a warning icon, and a dropdown menu currently showing 'United States'. A second 'Submit' button is at the bottom of the configuration area.

Figure 208: eBook Search Language

---

**NOTE:**

To configure the language drop-down in the eBook Search header, use **SFXAdmin > Configuration > Journal Search and A-Z List > Languages**.

---

The following table describes the fields of the Language section:

Table 43. eBook Search Language

Field	Description
Latin diacritic handling	<ul style="list-style-type: none"> <li>■ USA – All characters with diacritics are sorted as characters without diacritics. For example é is sorted as e.</li> <li>■ German – All characters with umlaut are sorted as characters without diacritics + e. The German letter ß is sorted as sz.</li> <li>■ Danish/Norwegian – The following characters are sorted after z: [Æ] [Ø] Å. All other diacritics are disregarded.</li> <li>■ Swedish – The following characters are sorted after z: Å Ä Ö. The German letter ü is sorted as y. All other diacritics are disregarded.</li> </ul> <p>By default this is set to USA.</p>
Select your country	Select your country. By default this is set to United States.

## eBook Search – Old Version

The following section describes the old version of the eBook Search. For information on the new version, see [eBook Search – New Version](#) on page 381.

The following information is retained when moving between the A-Z eJournal List and the eBook Search:

- The tab that was last selected in the A-Z eJournals List
- The last search performed in each tab of the A-Z eJournals List
- The last search performed in A-Z eBooks Search
- Whether table view or detail view was last selected in the eJournals or eBook Search (in case the default view was not selected)

---

**NOTE:**

Click the [Cookie Policy](#) link at the bottom of the eBook Search to display a description of the SFX Privacy Policy and how Ex Libris uses cookies.

---

## Accessing the eBook Search

To access the eBook Search, type the following URL in your Web browser:

http://<sfx\_server>:<port>/<instance>/azbook

ExLibris The bridge to knowledge

Find e-Journal Find e-Book English

Title:   Starts with  Contains  Exact

ISBN

Author Last name First name/Initials

Vendor

ABC-CLIO  
AIP Scitation  
American Psychological Association  
Cambridge University Press  
Chinese eBook Consortium

Search results for:  
Vendors: -ebrary-

Figure 209: eBook Search

You can add the following parameters to the eBook Search URL:

- lang=<3digit\_language\_code>

This parameter is used to present the appropriate language eBook Search. The accepted three-digit language codes are all ISO 639-2 three letter codes (plus Chi-simplified and chi-traditional).

For example: <http://demo.exlibrisgroup.com:3210/demo/az-books/?lang=eng>

- embedded=ML

This parameter removes the header image from the eBook Search display.

---

**NOTE:**

This parameter cannot be used to integrate the eBook Search with MetaLib (an option that does exist for the A-Z eJournals list).

---

## Searching eBooks

You can perform a search based on the following parameters:

- Title – the book title. You can perform the search according to the following options:
  - Starts with
  - Contains
  - Exact
- ISBN
- Author – only the last name is required. Note that not all books in the SFX KnowledgeBase currently have author information loaded. When performing an author search, books without authors are not included in the search result. You can configure the author field to not be displayed. For more information, see [Configuring the eBook Search – Old Version](#) on page 403.

---

**NOTE:**

The Last name box can also be used to search for corporate and meeting names.

---

- Vendor – select a vendor from the drop-down list. More than one vendor can be selected.

---

**NOTES:**

- Only ebooks with active `getFullTxt` or `getSelectedFullTxt` services (not `getAbstract`, `getTOC`, and `getHolding` services) are included in the eBook Search.
  - Threshold and coverage information is not included in the eBook Search.
  - Local title override for books is not included in the eBook Search.
  - Local book objects are not included in the local instance eBook Search if they are created in the shared instance as part of the set-up of local/shared instances in consortia model 3.
- 

## eBook Search Result Display

After you perform a search, the eBook Search displays the results in Table view or Detail view. For information on determining which view is displayed by default, see [Configuring the eBook Search – Old Version](#) on page 403.

### Table View

The following is an example of Table view:

Total number of e-Books: 7289			
Switch to Detail View		None of these? <a href="#">More options</a>	
Title Starts with:		Showing page 1 of 365 pages.	
10 - The * The - The * Abo - Ace * Ach - Ado * Ado - Aff * <a href="#">Next set of titles &gt;&gt;</a>			
Book title	ISBN	Author	Actions
<a href="#">10 strategies for reentering the workforce : career advice for anyone who needs a good (or better) job now</a>	0-313-35696-3	Ghilani, Mary E.	<a href="#">i</a> <a href="#">S</a>
<a href="#">100 Albums That Changed Popular Music: A Reference Guide</a>	0-313-33825-6	Smith, Chris	<a href="#">i</a> <a href="#">S</a>
<a href="#">100 Decisive Battles</a>	1-57607-075-1	Davis, Paul K.	<a href="#">i</a> <a href="#">S</a>
<a href="#">100 Hispanics You Should Know</a>	1-59158-327-6		<a href="#">i</a> <a href="#">S</a>
<a href="#">100 Media Moments That Changed America</a>	0-313-35517-7	Willis, Jim	<a href="#">i</a> <a href="#">S</a>
<a href="#">100 More Library Lifesavers</a>	0-89789-930-X	Bacon, Pamela S.	<a href="#">i</a> <a href="#">S</a>
<a href="#">100 More Research Topic Guides for Students</a>	0-313-30852-7	McDougald, Dana	<a href="#">i</a> <a href="#">S</a>
<a href="#">The 100 Most Important Chemical Compounds</a>	0-313-33758-6	Myers, Richard Leroy	<a href="#">i</a> <a href="#">S</a>
<a href="#">100 Most Popular African American Authors</a>	1-59158-322-5	Drew, Bernard Alger	<a href="#">i</a> <a href="#">S</a>

Figure 210: eBook Search Table View

In Table view, the following information is displayed:

- Book titles (Main, Abbreviated, Uniform, Alternative, Translation) – Click to skip the SFX menu and display full text (if directLink is turned on).
- ISBN (hardback, paperback, electronic)
- Author information
- i button - Click to display the details dialog box with book information.
- SFX button - Click to display the SFX menu.



## Detail View

The following is an example of Detail view:

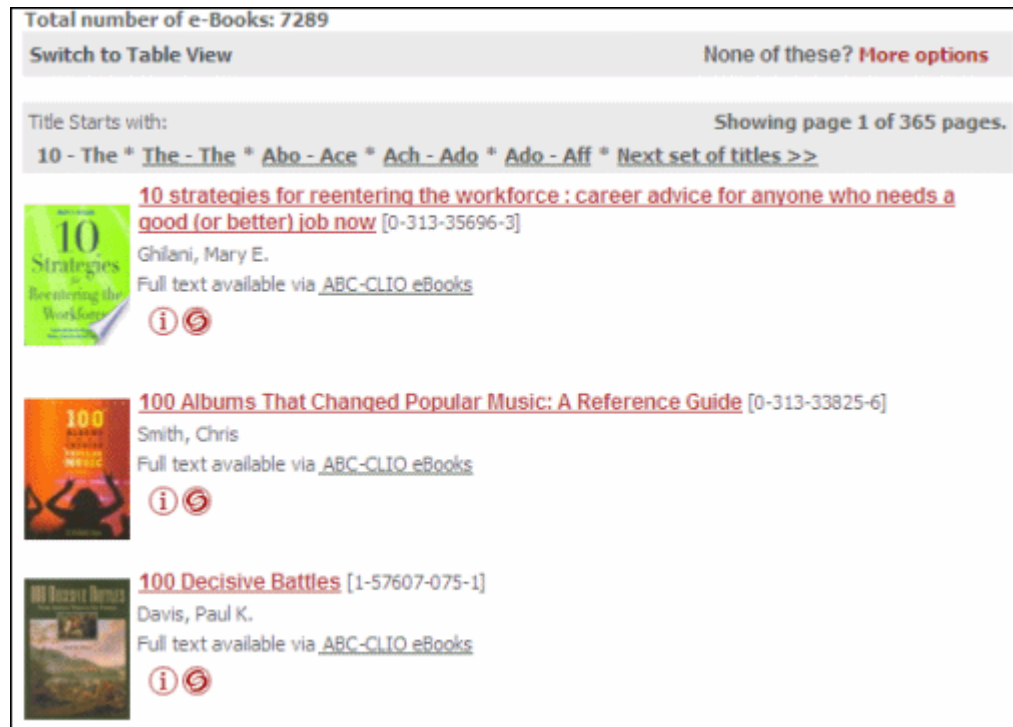


Figure 211: eBook Search Detail View

In Detail view, the following information is displayed:

- **Thumbnail** – An image of the book's cover. (If this is configured to be displayed).
- **Book Title** – Click to skip the SFX menu and display full text (if directLink is turned on).
- **Availability Statement** – Click the target name to skip the SFX menu and display full text (if directLink is turned on). The OpenURL link includes the object portfolio ID to ensure the SFX menu displays only this target. The Object portfolio threshold information is displayed in the Availability Statement. Note that object portfolio thresholds (of the type parsedDate and TimeDiff) are included, but not target or target service thresholds.
- **i button** – Click to display the details dialog box with book information.
- **SFX button** – Click to display the SFX menu.

By default, the following information is included in Detail view:

- Book Title (Main, Abbreviated, Uniform, Alternative, Translation)
- ISBN (hardback, paperback, electronic)

- Author information
- Imprint
- Availability information
- Note
- Authentication
- Book History (with related book information)

In the Detail view, a **None of these - More options** link is displayed that enables you to view the SFX menu and see more options (including ILL or DocumentDelivery options, if available).

By default, the following information is included in the Details dialog box:

- Book titles
  - Main
  - Abbreviated
  - Translation
  - Uniform
  - Alternative
- ISBN (hardback, paperback, electronic)
- Author information
- Imprint
- Availability information
- Note
- Authentication
- Book History (with related book information)

This option is available for the eBook Search, because the book for which you are searching may be unavailable electronically, since only a small percentage of books have been converted to electronic format. If a search is unsuccessful, click this link to view an SFX menu with the metadata information from the original search without any additional metadata enhancements from the SFX database.

## Building the eBook Search

The eBook Search uses a dedicated Solr index. Within the Solr index, each instance has its own Solr core. The Solr index is build and updated using the following two sources of information:

- the SFX databases (both global and local)
- the monograph RSI (for activation information)

The Solr index (and RSI index for monographs) is built using the Server Admin Utility in the following situations:

- Before you can start using the eBook Search for the first time
- After changes in the SFX KnowledgeBase – for example, activation or eBook Search configuration changes

For more information, refer to the **A-Z and eBook Search Indexes** and the **Rapid Service Indicator** sections of the *SFX System Administration Guide*.

## Configuring the eBook Search – Old Version

Click **eBook Search** from the **Configuration** section of the **Setup & Administration** area. The following sections are available:

- **Display** on page 404
- **Content** on page 405
- **Language** on page 408
- **UI Language Control** on page 409

## Display

From the Display section you can configure how the eBook Search is displayed. The following fields are available in this section:

The screenshot shows a configuration panel titled "DISPLAY Section" with a minus sign icon. It contains the following fields and options:

- Records per page:  (settings > 100 may cause performance issues)
- Max pagination links:  (The default value will be 100)
- Pagination link character length:  \*\*
- Default View:  Table View  Detail View
- Default Search:  Starts with  Contains  Exact
- Enable Ajax for title search:
- Include related object information in the eBook search index:  \*\*
- Include books in eBook search index which have no active services, but are related to objects with active services:  \*\*
- Display links between eBook Search and A-Z eJournals end user interfaces
  - A-Z eJournals  eBook Search
- Hide switch views option:
- Hide option 'None of these':
- Show Author Search boxes:
- Display book thumbnails:  Yes  No

Figure 212: eBook Search Display

The following table describes the fields of the Display section:

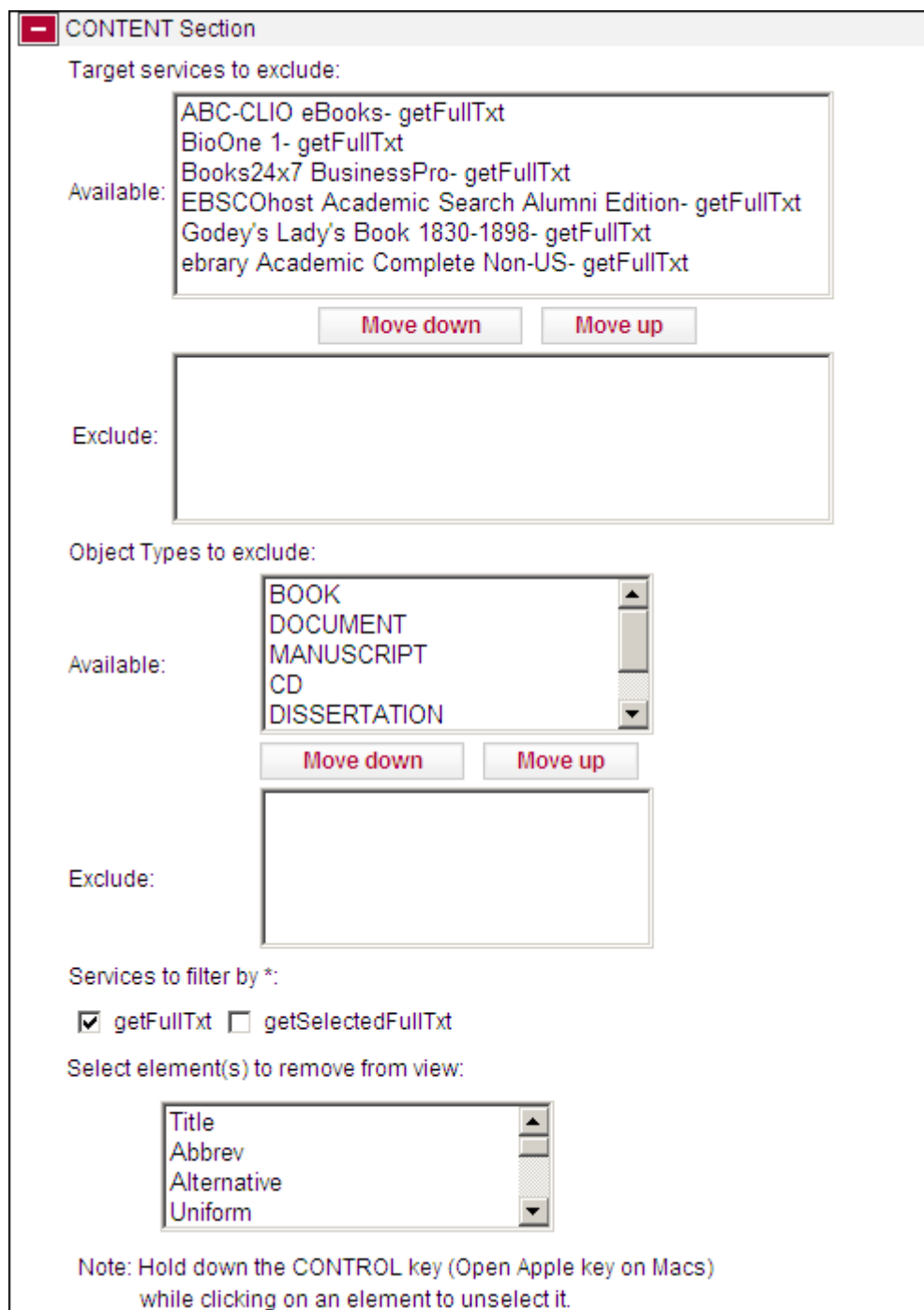
## Content

Table 44. eBook Search Display

Field	Description
Records per page	The number of records you want displayed on each page.
Max pagination links	The number of pages displayed in the navigation section at the top of each page. For example, if 5 is entered, the navigation section looks like this: < 1 2 3 4 5 >
Pagination link character length	The length of the pagination links.
Default View	Select either <b>Table View</b> or <b>Detail View</b> .
Default Search	Select either <b>Starts with</b> , <b>Contains</b> , or <b>Exact</b> . By default this is set to <b>Contains</b> .
Enable AJAX for title search	Select to enable the AJAX auto-complete feature. For more information about AJAX, see <a href="#">AJAX Auto-Complete</a> on page 349.
Include related object information in the ebook search index	Select to include related object information in the eBook Search. For more information, see <a href="#">Related Objects</a> on page 346. If selected, the following option is available.
Include books in ebook search index which have no active services, but are related to journals with active services	Select to include books in the eBook Search index that have no active services, but are related to books with active services. For more information, see <a href="#">Related Objects</a> on page 346.
Display links between ebook search and A-Z ejournals end user interfaces	Select to display a combined interface with links for both Find eJournal and Find eBook displayed.
Hide switch views option	Hides the option to switch between detailed and table views.
Hide option 'None of these'	Select to hide the <b>None of these? More Options</b> link.
Show author search boxes	Select to display the author search boxes.
Display book thumbnails	Select to display thumbnails of the ebooks in the result display. Select <b>Google books</b> or <b>Amazon</b> from the drop-down list to determine the source of the thumbnail.

From the Content section you can configure the content of the eBook Search

results. The following fields are available from the Content section:



**CONTENT Section**

Target services to exclude:

Available:

- ABC-CLIO eBooks- getFullTxt
- BioOne 1- getFullTxt
- Books24x7 BusinessPro- getFullTxt
- EBSCOhost Academic Search Alumni Edition- getFullTxt
- Godey's Lady's Book 1830-1898- getFullTxt
- ebrary Academic Complete Non-US- getFullTxt

Move down Move up

Exclude:

Object Types to exclude:

Available:

- BOOK
- DOCUMENT
- MANUSCRIPT
- CD
- DISSERTATION

Move down Move up

Exclude:

Services to filter by \*:

getFullTxt  getSelectedFullTxt

Select element(s) to remove from view:

- Title
- Abbrev
- Alternative
- Uniform

Note: Hold down the CONTROL key (Open Apple key on Macs) while clicking on an element to unselect it.

Figure 213: eBook Search Content

The following table describes the fields of the Content section:

Table 45. eBook Search Content

Field	Description
<b>Target services to exclude</b>	<p>Select the target services to exclude from the eBook Search.</p> <hr/> <p><b>NOTE:</b> The targets displayed in the Available box contain all the active targets (including journal targets). However, in the eBook Search index, targets without active books are excluded from the index, including journal targets listed in the Available box. A maximum of 50 targets can be listed in the Excluded box.</p>
<b>Object types to exclude</b>	<p>Select the object types to exclude. This also includes related objects.</p> <hr/> <p><b>NOTE:</b> Only monograph type objects are included in the eBook Search.</p>
<b>Services to filter by</b>	<p>Select the services to be displayed in the eBook Search.</p>
<b>Select elements to remove from view</b>	<p>Select the elements you do not want displayed.</p>

## Language

From the Language section you can configure the language of the eBook Search results. The following fields are available in the Language section:

**LANGUAGE Section**

User Interface Language Set:

<input type="checkbox"/> Catalan; Valencian	<input type="checkbox"/> Estonian	<input type="checkbox"/> Hebrew	<input type="checkbox"/> Slovak
<input type="checkbox"/> Chinese Simplified	<input type="checkbox"/> Faroese	<input type="checkbox"/> Icelandic	<input checked="" type="checkbox"/> Spanish
<input type="checkbox"/> Chinese Traditional	<input type="checkbox"/> Finnish	<input type="checkbox"/> Italian	<input type="checkbox"/> Swedish
<input type="checkbox"/> Czech	<input checked="" type="checkbox"/> French	<input type="checkbox"/> Japanese	<input type="checkbox"/> Welsh
<input type="checkbox"/> Danish	<input type="checkbox"/> Galician	<input type="checkbox"/> Korean	
<input checked="" type="checkbox"/> Dutch	<input checked="" type="checkbox"/> German	<input type="checkbox"/> Polish	
<input checked="" type="checkbox"/> English	<input type="checkbox"/> Greek	<input type="checkbox"/> Portuguese	

Select Default Language:

Select your country \*\*:

Latin diacritics handling \*\*:  USA  German  Danish/Norwegian  Swedish

Figure 214: eBook Search Language

The following table describes the fields of the Language section:

Table 46. eBook Search Language

Field	Description
<b>User Interface Language Set</b>	Select the languages to appear in the eBook Search drop-down list. If none is selected, only the default language is available.
<b>Select Default Language</b>	Select the default language to be used by the eBook Search.
<b>Select your country</b>	Select your country. By default this is set to United States.



Table 46. eBook Search Language

Field	Description
Latin diacritic handling	<ul style="list-style-type: none"> <li>■ USA – All characters with diacritics are sorted as characters without diacritics. For example é is sorted as e.</li> <li>■ German – All characters with umlaut are sorted as characters without diacritics + e. The German letter ß is sorted as sz.</li> <li>■ Danish/Norwegian – The following characters are sorted after z: [Æ] [Ø] Å. All other diacritics are disregarded.</li> <li>■ Swedish – The following characters are sorted after z: Å Ä Ö. The German letter ü is sorted as y. All other diacritics are disregarded.</li> </ul> <p>By default this is set to USA.</p>

### UI Language Control

From the UI Language Control section you can define the writing system of the objects that are displayed in the eBook Search.

There are two modes of behavior:

- **SFX 3 behavior** – the eBook Search only displays objects with the same writing system as the search term. Objects whose writing system is different than the search term are not displayed – even if the title is in the writing system of the search term. For example, if you enter a search term in English, the eBook Search displays objects whose language is written in a Latin writing system such as English, French, or German – but not objects written in the Chinese, Arabic, or Greek writing systems – even if the title of the object has been translated into a Latin writing system language.
- **SFX 4 behavior** – you can have the eBook Search search for objects whose writing system is different than the writing system of the search term, but whose title is in the same writing system as the search term.

## UI Control Visibility Hidden for SFX 3 Behavior

The following fields are available in the UI Language Control section with UI control visibility hidden for SFX 3 behavior:

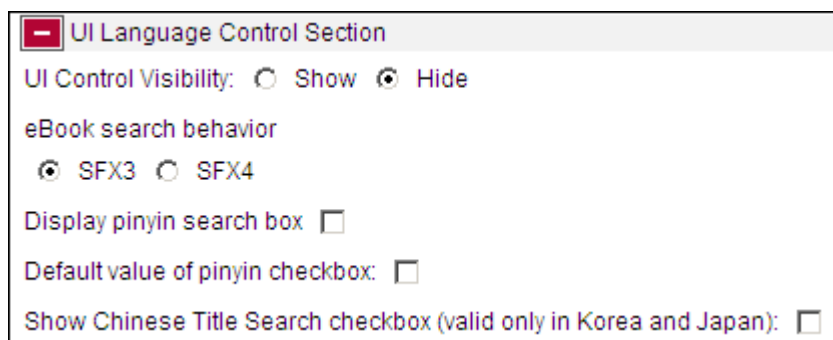


Figure 215: eBook UI Language Control SFX 3 Behavior

The following table describes the fields of the UI Language Control section with UI control visibility hidden for SFX 3 behavior:

Table 47. eBook Search UI Language Control SFX 3 Behavior

Field	Description
<b>UI Control Visibility</b>	Show or hide the ability in the eBook Search to limit searches to specific languages.
<b>eBook Search Behavior</b>	Select whether the eBook Search has the SFX 3 or SFX 4 behavior.
<b>Display pinyin search box</b>	Select to display the pinyin search box in the eBook Search.
<b>Default Value of Pinyin Checkbox</b>	Select to have the Pinyin checkbox in the A-Z List selected by default. The Pinyin checkbox is displayed only if the eBook Search uses both Pinyin and Latin headers.
<b>Show Chinese Title Search Checkbox</b>	Select to display the Chinese Title Search checkbox in the eBook Search. Select this checkbox if the book search profile country setting is Korea or Japan.  This checkbox allows the user to limit the title search to search only Chinese titles.

## UI Control Visibility Hidden for SFX 4 Behavior

The functionality of the eBook Search when control visibility is hidden for SFX 4 behavior is the same as with the A-Z list. For more information, see [UI Control Visibility Hidden for SFX 4 Behavior](#) on page 374.

---

**NOTE:**

It is recommended to select all writing systems or a selection of writing systems for which you want your end users to be able to search. If a specific writing system is not selected, the eBook Search will not display results in those writing systems, even if they exist. Do this only for a specific profile, or where you do not want the titles of a specific writing system to be searchable.

---

### UI Control Visibility Displayed

The functionality of the eBook Search when control visibility is displayed is the same as with the A-Z list. For more information, see **UI Control Visibility Displayed** on page 376.

## Copying A-Z eJournals Configuration

You can create eBook Search configuration profiles based on existing A-Z eJournal configuration profiles.

### To create eBook Search configuration profiles based on existing A-Z eJournal configuration profiles:

- 1 Click **Copy A-Z eJournals configuration wizard**. The following is displayed:

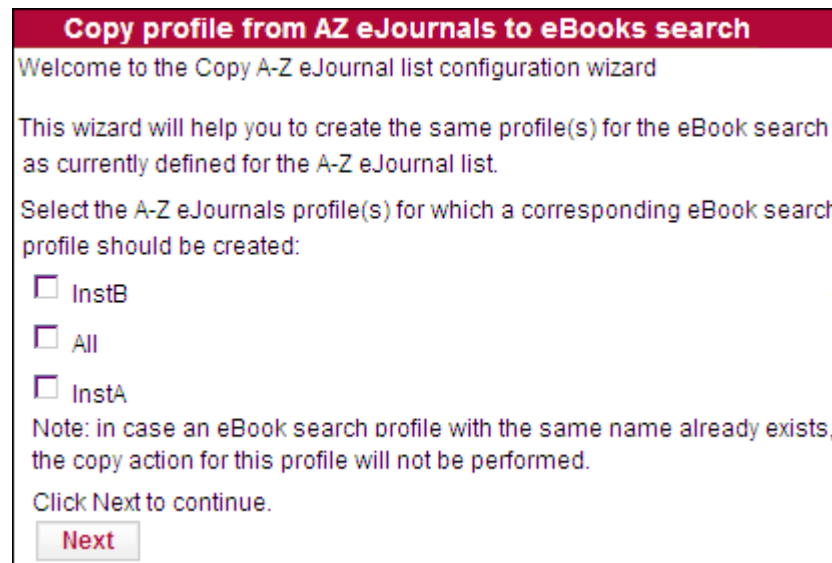


Figure 216: Copy A-Z eJournals Configuration Wizard

- 2 Select the A-Z eJournal profiles for which you want to create a corresponding eBook Search profile.

- 3 Click **Next**. The following is displayed:

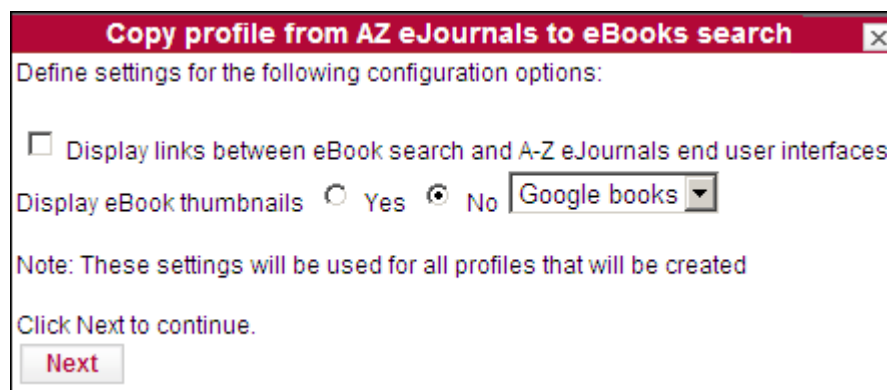


Figure 217: Define Settings

- 4 Select the eBook Search options you want.

---

**NOTE:**

If the wizard is used to copy multiple profiles, the options you select apply to all the profiles that are copied. Note that changes to each profile can be made after they have been created.

---

- 5 Click **Next**. The following is displayed:



Figure 218: Settings Created Successfully

- 6 Click **Finish** to close the wizard.

## Menu Configuration

This section includes:

- [Menu Configuration Overview](#) on page 413
- [Menu Design – General Configuration](#) on page 423
- [Menu Design – Simplified Template and Mobile Configuration](#) on page 431
- [Manual Configuration of Simplified Menu HTML Templates](#) on page 438
- [Display Logic](#) on page 441

- [Proxy/Crossref](#) on page 446
- [Ebsco targetURL API](#) on page 452
- [DirectLink](#) on page 452
- [Related Objects](#) on page 464
- [SFX API](#) on page 474
- [Additional SFX Menu Configurations](#) on page 474
- [Mobile SFX Menu](#) on page 475

## Menu Configuration Overview

When you click the **SFX** button in a search engine or database, the SFX menu is displayed, showing a short summary of the object and a list of basic and extended available services. It contains names of targets, groupings, and descriptions of the different services. All of these items and the order in which they appear can be customized according to your institution's preferences.

For each SFX instance, the look and feel and layout can be completely customized. As a result, different SFX instances on the same SFX server can have SFX menus that look very different. Within each instance, it is possible to determine the look and feel of the menu by selecting an SFX menu template set.

The available templates are:

- The advanced menu template – the default SFX menu template. This SFX menu template has all possible configuration options available by default. Configurations and translations of this template set need to be performed via the HTML templates and UNIX configuration files. For more information on the advanced menu template, refer to the *SFX Advanced User's Guide*.
- The simplified SFX menu template – displays fewer details than the advanced menu, although they can be added, as desired. All configuration and language changes for the simplified menu template set can be done via the SFX Menu main tab of the Translations & Display section of the SFX Admin Center interface.

This section includes:

- [SFX Menu for Multiple Hits in the SFX Database](#) on page 414.
- [ServiceType Feature](#) on page 418
- [Country and Language Settings](#) on page 420
- [Report Broken Link](#) on page 421

### **SFX Menu for Multiple Hits in the SFX Database**

A special SFX menu format is displayed if more than one object is found in the SFX database when building the SFX ContextObject. Possible matches are listed in a special SFX menu format called the multi-object menu. The user selects one of the objects to complete the SFX request.

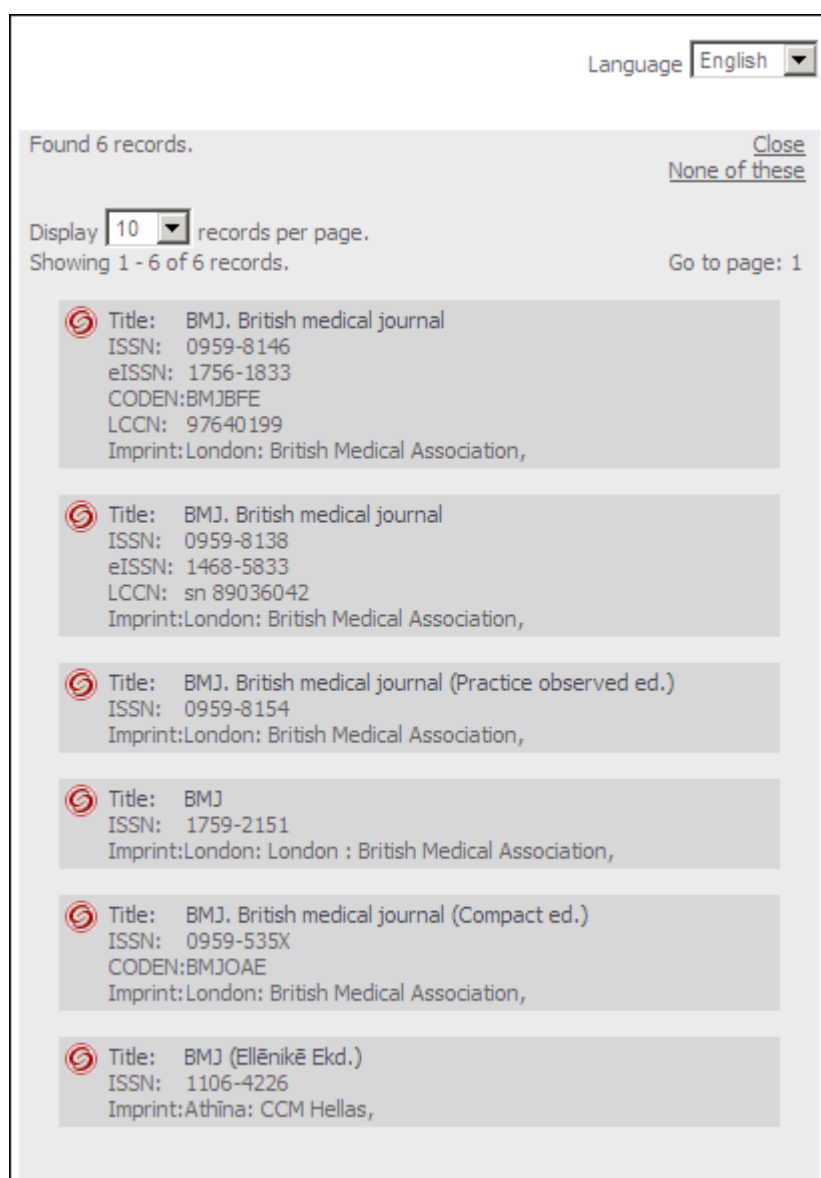


Figure 219: SFX Menu for Multiple Hits

The multi-object menu is displayed in the following scenarios:

- The OpenURL contains the ISSN, ISBN, LCCN, or other unique identifier. SFX tries to find a match for this unique identifier in the SFX database.

- If SFX finds one object in the SFX database, the object metadata found in the database is added to the ContextObject (a process called augmentation) and the SFX menu is displayed.
- If no match is found, the SFX menu is displayed without any metadata from the SFX database.
- If SFX finds multiple hits in the SFX database, the multi-object menu is displayed.
- The OpenURL does not contain an ISSN, ISBN, or other unique identifier. SFX tries to find a match for the title of the context object in the SFX database. This scenario occurs more often when using the CitationLinker, as described in the **CitationLinker** section of the *SFX Advanced User's Guide*.
  - For books:
    - If one or multiple results are found in the SFX database, the multi-object menu is displayed.
    - If no match is found, the standard SFX menu is displayed.
  - For journals:
    - If multiple results are found in the SFX database, the multi-object menu is displayed.
    - If one match or no match is found, the standard SFX menu is displayed.

If the multi-object menu does not list the journal or book for which you are searching, click **None of these**. An SFX menu is created with the metadata from the original OpenURL without any additional metadata enhancements from the SFX database.

## Configuring the Multi-Object Menu

There are two configuration options for configuring the Multi-Object Menu, version 2 and the legacy version 1 that has fewer configuration options in the interface and instead requires configuration using `tmpl` files.

Access the Multi-Object Menu configuration page from **Configuration > Menu Configuration > Menu Design > Multi-Object Menu configuration**.

The Multi-Object Menu configuration page for version 2 appears as follows:

**Active configuration for multi-object display:**

Multi-object menu V.1 ▲  
Multi-object menu V.2 ▼

**Select Multi-object header image:**  
 Same as SFX menu  Upload a new header image ?

**Select mobile Multi-object header image:**  
 Same as mobile SFX menu  Upload a new header image ?

**Select type of objects displayed in the multi-object window: ?**  
 All objects  Only objects with at least one active full text service

Display objects with active full text services at the top of the list ?

**Records Per Page List:**  5  10  20  50  100

**Default number of records per page:** 10 ▼

**Maximum number of navigation links per page:** 5 ?

Figure 220: Multi-Object Menu Configuration Version 2

The options to select a multi-object header image and to select a mobile multi-object header image are only available for version 2. The following `tmpl` files determine the layout of the Multi-Object Menu:

- `head.tmpl`
- `main.tmpl`
- `new_openurl.tmpl`
- `search_description.tmpl`
- `tail.tmpl`

For template V1, these files are located in `exlibris/sfx_ver/sfx4_1/<instance>/templates/multiobject`

For template V2, these files are located in `exlibris/sfx_ver/sfx4_1/<instance>/templates/multiobject_v2`

For version 2 template wording changes are done using the SFX Admin Center (**Configuration > Translation and Display > MultiObjects Menu**). For version 1, wording changes should be done in the `tmpl` files listed above. For example,



text can be changed in the following section of the `exlibris/sfx_ver/sfx4_1/instance/templates/multiobject/main.tpl` file:

```
<TMPL_LOOP service_loop>
  <TMPL_IF getAbstract>Abstract</TMPL_IF>
  <TMPL_IF getAlikeRecord>A like record</TMPL_IF>
  <TMPL_IF getAuthor>Author</TMPL_IF>
  <TMPL_IF getAuthorEmail>Author e-mail</TMPL_IF>
  <TMPL_IF getBookReview>Book review</TMPL_IF>
  <TMPL_IF getCitedJournal>Cited journal</TMPL_IF>
  <TMPL_IF getCitedRecord>Cited record</TMPL_IF>
  <TMPL_IF getCitedReference>Cited reference</TMPL_IF>
  <TMPL_IF getDocumentDelivery>Document delivery</TMPL_IF>
  <TMPL_IF getDOI>DOI</TMPL_IF>
  <TMPL_IF getFullTxt>Full text</TMPL_IF>
  <TMPL_IF getHolding>Holding</TMPL_IF>
  <TMPL_IF getMessageNoFullTxt>No full text</TMPL_IF>
  <TMPL_IF getReference>Reference</TMPL_IF>
  <TMPL_IF getSubject>Subject</TMPL_IF>
  <TMPL_IF getTOC>TOC</TMPL_IF>
  <TMPL_IF getWebSearch>Web search</TMPL_IF>
  <TMPL_IF getWebService>Web service</TMPL_IF>
  <TMPL_UNLESS __last__,</TMPL_UNLESS>
</TMPL_LOOP>
```

You can view the SFX multi-object menu by sending an OpenURL to the server with a title that belongs to two or more different objects.

For example:

```
http://demo.exlibrisgroup.com:3210/demo?ctx_tim=2004-10-14T16%3A45%3A1EDT&rft.jtitle=BIOCHEMISTRY&rft.genre=journal&rft_val_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Ajournal&ctx_id=10_1&ctx_enc=info%3Aofi%2Fenc%3AUTF-8&ctx_ver=Z39.88-2004&url_ver=Z39.88-2004&svc_val_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Asch_svc&res_id=http%3A%2F%2F10.1.2.233%3A3210%2Fsfxtst3&url_ctx_fmt=10_1
```

The multi-object window has been optimized for display on mobile devices. You access the multi-object window the same way as you would the standard interface – the mobile device is automatically detected.

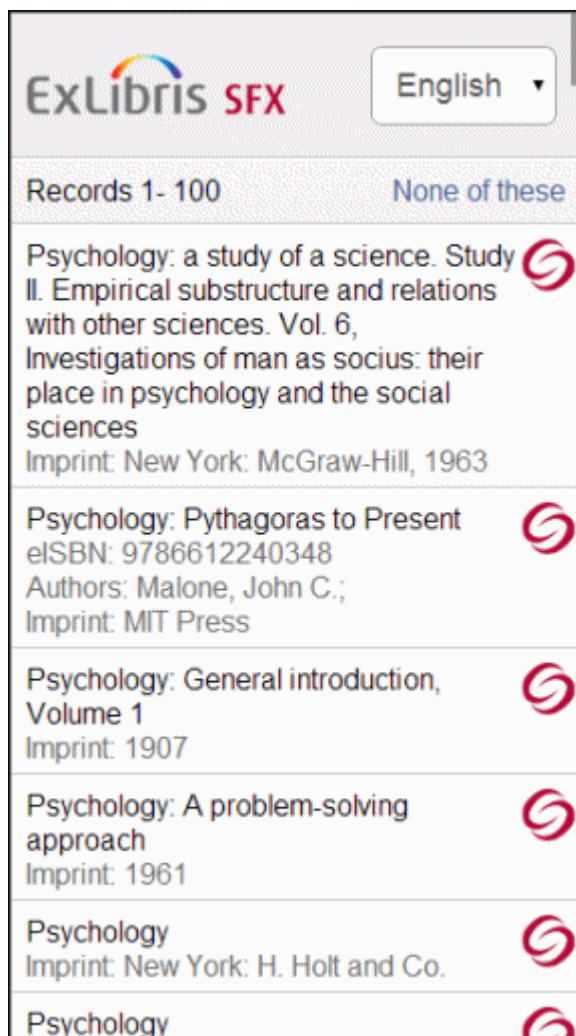


Figure 221: Multi-Object SFX Menu for Mobile Devices

### **ServiceType Feature**

It is possible to restrict the type of services that are displayed in the SFX menu by sending a specially structured OpenURL to the SFX menu. However, this feature can be used only if:

- The library is the information provider (for example, in cases of local collections) and therefore responsible for generating OpenURLs.
- The vendor agrees to provide a serviceType parameter in the OpenURL.
  - In OpenURL 0.1 this needs to be done in the `pid` section of the OpenURL.
  - In OpenURL 1.0 this can be done using the standard OpenURL element.

---

**NOTES:**

When restricting the type of services that are displayed in the SFX menu to full text only (using the OpenURL 1.0 format `svc.fulltext=yes`), the following SFX serviceTypes are included:

- For HTML menu included services are:
    - `getFulltxt`
    - `getSelectedFullTxt`
    - `getMessageNoFullTxt`
  - For all other outputs (including `simplexml`, other xml formats, `service_exist`, etc.), the included services are:
    - `getFulltxt`
    - `getSelectedFullTxt`
- 

**To use this feature in OpenURL 0.1:**

- 1 In the `pid` section of the OpenURL, specify the types of services that you want displayed:

```
pid=serviceType=<name of Service>-<name of Service>
```

- 2 Make sure that the OpenURL contains an `sid` (sourceID), and that the corresponding source parser includes a section that can interpret the `serviceType` part of the `pid`.

For example:

```
http://demo.exlibrisgroup.com:8888/demo?sid=ALEPH&issn=0002-8894&volume=059&issue=1&pid=serviceType=getFullTxt
http://demo.exlibrisgroup.com:8888/demo?sid=ALEPH&issn=0002-8894&volume=059&issue=1&pid=serviceType=getHolding
http://demo.exlibrisgroup.com:8888/demo?sid=ALEPH&issn=0002-8894&volume=059&issue=1&pid=serviceType=getWebService-getFullTxt
http://demo.exlibrisgroup.com:8888/demo?sid=ALEPH&issn=0002-8894&volume=059&issue=1&pid=serviceType=getWebService-getFullTxt-getHolding
```

Currently, the following SFX sources can interpret the `serviceType` part of the `pid`:

- Aleph
- EJOURNAL\_LIST.

In XML, the `serviceType` indication should be:

```
<__service_type>getFullTxt</__service_type>
```

### To use this feature in OpenURL 1.0:

In KEV OpenURL use the following:

```
svc_val_fmt=info:ofi/fmt:kev:mtx:sch_svc&svc.fulltext=yes
```

In XML OpenURL, the serviceType indication looks like the following:

```
<ctx:service-type>
  <ctx:metadata-by-val>
    <ctx:format>info:ofi/fmt:xml:xsd:sch_svc</ctx:format>
    <ctx:metadata>
      <sv:fulltext xmlns:sv="info:ofi/fmt:xml:xsd:sch_svc">yes</
sv:fulltext>
    </ctx:metadata>
  </ctx:metadata-by-val>
</ctx:service-type>
```

## Country and Language Settings

The configuration file located at `/exlibris/sfx_ver/sfx4_1/<instance>/config/ctx_object.config` determines the country settings, title diacritic handling, and Kanji variant configuration of SFX for each instance:

```
Section "locale"
  country "China"
  diacritics_handler "diacriticsUSA"
  use_kanji_variant "1"
EndSection
```

The following are the permitted values:

- **Country** – The full name of the country, as listed in the ISO 3166-1 standard.

---

### NOTES:

- For Taiwan, use Taiwan, not Taiwan, Province of China.
  - If Mainland China is defined as the country, for Chinese objects, the Simplified Chinese version of the title is displayed in the SFX menu banner and stored in the ContextObject.
  - If Taiwan is defined as the country for Chinese objects, the Traditional Chinese version of the title is displayed in the SFX menu banner and stored in the ContextObject.
- 
- **Diacritics Handling** – Determines how diacritics are handled for searching and sorting of title information. Diacritic settings are not applicable for the SFX menu. They are used for sorting in KBManager. Possible values for the `diacritics_handler` parameter are:
    - `diacriticsUSA`

- diacriticsGerman
- diacriticsSwedish
- diacriticsDanish
- **Use Kanji Variants** – Determines if Kanji variants are used for title searches. Values can be 1 or 0. Japanese customers are recommended to activate this feature. If this parameter is not displayed, add it to the `locale` section of the `config/ctx_object.config` file.

```
use_kanji_variant      "1"
```

### Report Broken Link

The Report Broken Link option in the SFX menu can be used by the end user to report broken target links to Ex Libris and to any e-mail address you configure. This option is displayed in the SFX menu for full text, abstract, and Table of Contents services, if the **Go** button or a link to the target has been clicked.

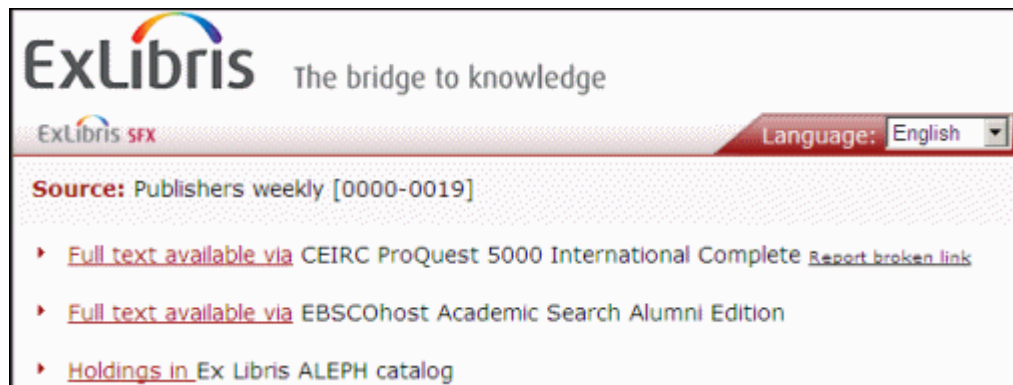


Figure 222: Report Broken Link

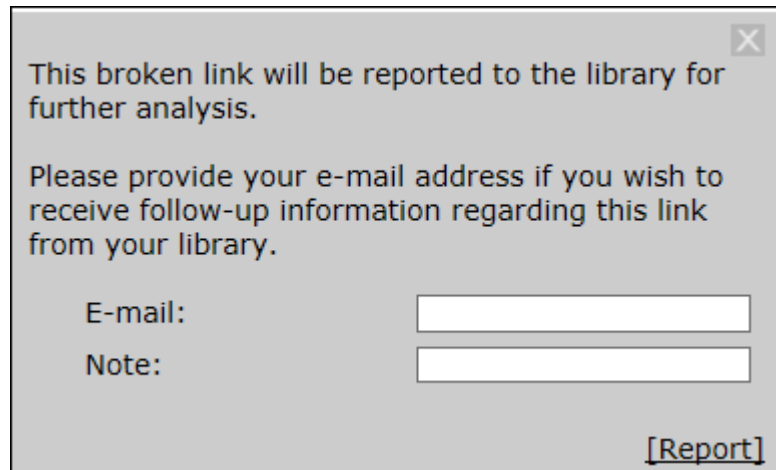
When you click **Report a Broken Link**, the information about the target and target URL is sent to the Ex Libris Beacon server and used to analyze and improve target linking. Additionally, you can configure SFX to send a copy of the report to a pre-defined e-mail address.

By default, the new option is active in the SFX menu after applying the 4.3.1 Service Pack (for Simplified template set only). It is possible to disable the Report Broken Link option and define additional configuration settings. For information on configuring the Report Broken Link functionality, see **Target Design** on page 433.

The text for the Broken link option can be changed and translated via the SFX Menu Main tab of the Translations & Display section of the SFXAdmin Center.

By default, the display of the option is enabled (in simplified menu only).

When clicking **Report broken link**, the following is displayed if you have configured end users to be able to specify an email address and configured an email address for the library:



The screenshot shows a gray dialog box with a close button (X) in the top right corner. The text inside the dialog box reads: "This broken link will be reported to the library for further analysis." followed by "Please provide your e-mail address if you wish to receive follow-up information regarding this link from your library." Below this text are two input fields: "E-mail:" with a text box and "Note:" with a text box. In the bottom right corner of the dialog box, there is a button labeled "[Report]" with a blue underline.

Figure 223: Report Broken Link

Enter an email address to receive follow-up information regarding this link from your library and click **Report**.

The following is an example of an email sent to the library:

```
From: sst1\_2@il-sfx08.corp.exlibrisgroup.com
[mailto:sst1\_2@il-sfx08.corp.exlibrisgroup.com]
Sent: 01 September 2015 08:54
To: Lieve Rottiers
Subject: Broken link report from sst1_2 instance

The following broken link report was sent to Ex Libris from
the SFX menu by one of your users:

    OpenURL: http://www.sfxserver-example.org:3410/
sfxlcl41?url_ver=Z39.88-
2004&url_ctx_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Actx&ctx_ver=Z
39.88-2004&ctx_enc=info%3Aofi%2Fenc%3AUTF-
8&rfr_id=info%3Asid%2Fsfxit.com%3Akbmanager&sfx.ignore_date_t
hreshold=1&rft.object_id=1000000000017905

    Target name: ACLS_HUMANITIES_EBOOK

    Target URL: http://hdl.handle.net/2027/heb.04414

    This user would like to receive follow-up information
regarding this broken link at the following e-mail address:
lieverottiers@exlibrisgroup.com

    End user note: Broken link

    NOTE: The 'Report Broken Link' option allows end-users to
send Ex Libris immediate feedback about issues they may
encounter. This information allows Ex Libris to resolve
broken links much more quickly, using analysis of multiple
reports that reach us centrally from SFX sites worldwide.
```

## Menu Design – General Configuration

Click **Menu Configuration** from the **Configuration** section of the **Setup & Administration** area. Click the **Menu Design** tab. The following window opens.

**Ex Libris SFX**  
Home | KBManager | Configuration

Menu Configuration | Journal Search and A-Z list | eBook Search | Translation & Display

**Menu Configuration**

Menu Design | Display Logic | Proxy / CrossRef | DirectLink | Related Objects | SFX API

Configuration applicable to all SFX menu templates

**General Configuration**

- Simplified Template and Mobile Configuration
- Multi-object menu Configuration
- DirectLink Banner Configuration

**Select a template:**

Advanced  
Simplified Template No.1  
Active template: **Simplified Template No.1** ?  
 Activate selected template after submit

- Include warning (timediff warning) in SFX menu in case the item may not be available because of an embargo or rolling year period ?
- Enable tooltip for timediff warning
- As the first target(s) in the SFX menu, display services in case they use vendor identifiers validated by Ex Libris as preferred linking IDs
- Prefer SFX menu services linking back to/from the same vendor/provider - by displaying them as the first target(s) in the SFX menu ?

Enable/disable mobile SFX menu view (including mobile version of multi object menu and directlink banner):

- Enable for all sources
- Enable for all sources except Primo
- Disable

- Display SFX menu without banner if user is coming from Primo ?
- Show language drop-down ?

First of selected languages will be the default language of the menu

All Languages | Selected Languages

Svenska  
Català  
Slovak  
Norwegian  
Finnish  
Français  
Ελληνικά  
Italiano  
Polish  
한국어  
Chinese Simplified

>>> <<<<

English  
Español  
Dansk

**Report Broken link option** ?

- Display 'Report Broken link' option

Types of services to display 'Report Broken link' option:

- getAbstract
- getFullTxt
- getSelectedFullTxt
- getTOC

Send copy of report to the following library e-mail address(es):

- Allow end user to specify e-mail to receive follow-up information from the library ?
- Disable XSS protection for IE 8 and higher ?

**Target services in the SFX menu will be opened:**

- In a new tab or window
- In the same tab - overriding the SFX menu

Figure 224: Menu Design – General Configuration



This section describes how to select a template set, as well as additional configuration settings that are applicable to all SFX menu templates.

### Selecting a Template

This section describes how to select a template set.

#### To select a template:

- 1 Click **Select a template**. The available template sets are displayed. The active template seen by end users is noted on the right side of the template list.
- 2 Select the template you want to use for the SFX menu in the list box and select **Activate selected template after submit** to confirm.
- 3 Click **Submit**. A warning message is displayed.
- 4 Click **Yes** to confirm the change of template.

The SFX menu appearance is altered according to the new template.

The following is an example of an SFX menu:

The screenshot shows an SFX menu template with the following components labeled on the left:

- Header:** ExLibris logo and the tagline "The bridge to knowledge".
- Banner (Including Logo and Metadata):** ExLibris SFX logo, Title: "A common mutation is associated with a mild, potentially asymptomatic phenotype in patients with isovaleric acidemia diagnosed by newborn screening.", Source: "American Journal of Human Genetics [0002-9297] Ensenauer yr:2004 vol:75 :6 pg:1136 -42".
- List of Basic Services:** Two service links: "Full text available via EBSCOhost Academic Search Premier" and "Holdings in Innovative INNOPAC catalog". Below the links are input fields for Year (2004), Volume (75), Issue (6), and Start Page (1136). A "More Options" dropdown menu is also present.
- Copyright Statement:** © 2008 SFX by Ex Libris Inc.

Figure 225: SFX Menu

The menu consists of:

- A header image, in this case the Ex Libris corporate logo
- A banner with a short summary of the record. The banner can also include a language drop-down list and a banner logo (in this case, the SFX logo).
- A list of services. Each target service is comprised of two parts:
  - The name of the target—for example, **EBSCOhost Academic Search Premier**. The name of a target can be changed by editing the target's **Public Name** field in the target edit window in KBManager. (See [Editing Targets](#) on page 53 for more information.) This text cannot currently be translated into multiple languages.
  - The service, for example, **Full-text available via**. Changes can be made to this text using the **Translations & Display** section of the SFX Admin Center. This is described in the **Force Targets to Display at the Bottom of a List of Services** section of the *SFX Advanced User's Guide*.
- A copyright statement

The services in the SFX menu are grouped into two main groups:

- **Basic services** – Appear immediately when loading the SFX menu.
- **Advanced services** – Appear only when you click **More options**.

This grouping is controlled by a configuration option called Collapsible Menu. For more information about this configuration option, refer to the **Defining the Basic Group of Services** section of the *SFX Advanced User's Guide*.

### **Timediff Warning**

Some articles may not be displayed in the SFX menu if they have an embargo or moving wall period. (For more information concerning embargoes and moving walls, see [Moving Wall/Embargo](#) on page 123.) You can have a warning displayed in the SFX menu that an article may not be available because of an embargo or moving wall period. Select the checkbox to display the warning in the SFX menu. To have a tooltip display to explain the warning, select **Enable tooltip for timediff warning**.

The following is an example of the SFX menu with the warning displayed:

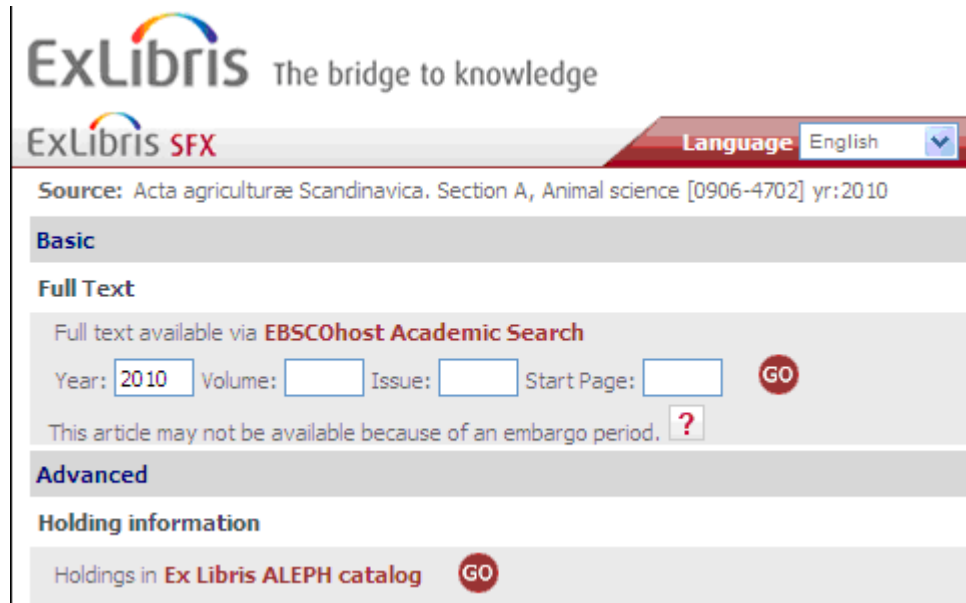


Figure 226: Embargo Warning

### ***Giving Preference to the Original Source***

The sorting algorithm of the target list in the SFX menu takes the source of the record into account when linking from Primo Central. When Primo Central is the OpenURL source, services via SFX targets that match the record source in Primo Central are now displayed at the top of the list presented in the SFX Menu.

For example, when an OpenURL is sent to SFX by Primo Central for a record that originated from Gale (SID values include Primo Central and Gale), Gale targets (if activated) are presented at the top of the SFX menu list of targets.

Note that this functionality overrides target sorting and does not interfere with display logic rules.

By default, this option is turned on, but the option can be deactivated by clearing the relevant check box.

The mapping between Primo Central sources and SFX targets is defined in the following global configuration file:

```
config/source_to_target_mapping.txt
```

Note that this is a global file that should not be changed. It is updated as part of the weekly KB updates.

The following is the format of the file:

```
Section "mapping"  
<string in the 'sid' value of the Primo Central openurl>  
<string in the SFX_TARGET_INTERNAL_NAME>  
EndSection
```

The following is an example of the Primo sid:

```
rfr_id=info:sid/primo.exlibrisgroup.com:primo3-Article-gale_ofa
```

From this sid, SFX extracts the word from last hyphen (-) until the end of the sid. The word is matched against the list of Primo Central 'sid' values in the configuration file, and SFX then checks the corresponding target name to see if it exists in the target list of the SFX menu.

For example:

```
Section "mapping"  
(...)  
gale_ofa          GALEGROUP.*  
(...)  
EndSection
```

### ***Giving Preference to Links Using Vendor Identifiers Validated by Ex Libris as Preferred Linking IDs***

SFX supports links that use article IDs instead of metadata to link to provider platforms, to enhance linking accuracy. By default, if a service in the SFX menu uses a vendor identifier for linking, the service automatically gets a higher priority setting than services that do not support such direct linking. Such a service is pushed to the top of the SFX menu list of services – it is displayed as the first service in the list. If Direct Link is turned on, it is available for this service.

Vendor identifiers (such as article level record numbers or DOIs) are typically provided when a user is coming from Primo Central.

The following providers are currently on the preferred linking ID list:

Table 48. Providers on the Preferred Linking ID List

<b>Provider</b>	<b>CTXO Attribute Used For Preferred Linking By Identifier</b>
Cambridge University Press	rft_cupid, rft.doi
Elsevier ScienceDirect	rft.doi
Erudit	rft_eruid, rft.doi
Gale	rft_galeid

Table 48. Providers on the Preferred Linking ID List

Provider	CTXO Attribute Used For Preferred Linking By Identifier
Ingenta	rft_ingid
Institute of Physics (IOP)	rft.doi
JSTOR	rft.doi
Nurimedia	rft_nurid
Proquest	rft_pqid
Sage	rft.doi
Springer	rft.doi
Taylor&Francis	rft.doi
Thieme	rft.doi

By default, the preferred link target behavior is active. To deactivate this feature, clear the following option from **SFXAdmin > Menu configuration > General**:

**As the first target(s) in the SFX menu, display services in case they use vendor identifiers validated by Ex Libris as preferred linking IDs.**

### **Enabling/Disabling the Mobile SFX Menu View**

You can choose to enable or disable the mobile SFX menu view (including the mobile version of the multi-object menu and direct link banner) for all sources or enable for all sources except Primo. Select one of the following options:

- **Enable for all sources** – the mobile SFX menu is displayed for all sources.
- **Enable for all sources except Primo** – the mobile SFX menu is displayed for all sources except Primo, which instead displays the regular version of the SFX menu. This option is selected by default because the SFX menu mobile UI is optimized for standalone use and works by detecting the device, not the screen size. This works differently in Primo, especially for tablets, where the SFX menu usually appears embedded within a Primo tab.
- **Disable** – the mobile SFX menu is not displayed for any source. Instead, the regular version of the SFX menu is displayed. This option disables the mobile view only for the SFX menu, multi-object menu, and direct link banner, but NOT for CitationLinker. For the A-Z List and CitationLinker, there is no option to not display the mobile view.

By default, the option to enable for all sources except Primo is selected.

For more information concerning the mobile SFX menu, see **Mobile SFX Menu** on page 475.

### **Display SFX Menu Without Banner if User Coming From Primo**

You can choose to have SFX display the SFX menu without the header and banner information when coming from Primo, since in this case, the banner information is already displayed. Instead, only the list of services and copyright statement will be shown in the SFX menu.

### **Show Language Drop-Down**

You can choose to display the language drop-down list in the SFX menu. The default is to not display the drop-down list.

Select the languages you want displayed in the language drop-down list of the SFX menu.

### **Report Broken Link**

You can choose to display a **Report broken link** link in the SFX menu.

The following types of services can be displayed in the Report Broken link option:

- getAbstract
- getFullTxt
- getSelectedFullTxt
- getTOC

To send copy of the report to a library e-mail address, enter the email addresses to which you want to send a copy of the report.

You can choose to allow end users to specify an e-mail address to receive follow-up information from the library. This option is only available if an email address has been entered in the previous step.

For more information on the Report Broken Link functionality, see **Report Broken Link** on page 421.

### **Disable XSS Protection for IE 8 and Higher**

Select if Internet Explorer's cross site scripting protection prevents Open URLs from being accepted.

### **Target Services in the SFX menu will be opened**

Select an option to open target services in the SFX menu:

- In a new tab or window
- In the same tab - overriding the SFX menu

## Menu Design – Simplified Template and Mobile Configuration

This section describes all configuration options for the simplified menu templates and the mobile SFX menu. Refer to the *SFX Advanced User's Guide* for information concerning configuration options for the advanced menu templates, as well as all additional configuration settings for this menu.

### NOTE:

Configuration of the SFX menu for mobile devices uses the same configuration UI as the Simplified template No. 1. For more information, see **Mobile SFX Menu** on page 475.

After any configuration change, you can either save your changes by clicking **Save**, or you may decide not to save them by clicking the **Load Last Saved** link. In this case, the last saved configuration is loaded and the changes made are deleted.

Additionally, it is possible to reload the default configuration provided with the SFX simplified menu template by clicking **Load Defaults**. This deletes all customized settings.

### Menu Design

To customize the SFX menu, click **Menu Design** from the left panel. The following window opens:



Figure 227: Menu Design

The following are the available configuration options:

- **Header Image Type** – Where to display the header image. Select from the following:
  - **No Header** – No header image is displayed. The banner area is the first element of the SFX menu.
  - **Above SFX Banner** – The header image is displayed above the SFX banner, as in [Figure 225](#) on page [425](#).
  - **Instead of SFX Banner** – The header image is displayed at the top of the page and the banner is not displayed. Record metadata is still displayed. Do not select this option if you want to display the language drop-down list, since the language drop-down list is part of the banner.

To change and preview the header image, click **Select image** next to the currently configured header image preview. A dialog box is displayed showing the current available banner images. Select a displayed image or upload a new one.

- **Show Image in SFX Banner** – A small logo image can be displayed in the SFX banner. By default, the SFX logo is used. The logo can be replaced by uploading or selecting a different logo. To change the logo, click **Select image** next to the currently configured image. A dialog box is displayed, showing the available logo images. Select a displayed image or upload a new one. The logo must be 23 pixels high and have a width between 70 and 200 pixels in order to fit in the SFX menu banner area.
- **Header Image for Mobile SFX Menu** – This header image is displayed at the top of the SFX menu when it is viewed in a mobile device. By default, the SFX logo is used. The logo can be replaced by uploading or selecting a different logo. To change the logo, click **Select image** next to the currently configured image. A dialog box is displayed, showing the available logo images. Select a displayed image or upload a new one. It is recommended to use an image 50 pixels high and 210 pixels long. For more information concerning the mobile SFX menu, see [Mobile SFX Menu](#) on page [475](#).
- **Collapsible Menu** – Select to group the services in the SFX menu into basic and advanced groups of services. The advanced services are hidden when the SFX menu initially loads. They can be viewed only when you click **More Options** in the SFX menu. When the collapsible menu is disabled, all services in the SFX menu are displayed immediately. The collapsible menu option is the default.
- **Alignment of 'More Options' tab** – Select to align the More Options tab to the right or the left. When using the collapsible menu, the More Options tab appears in the SFX menu if advanced services are available. By default, the More Options tab is aligned to the right of the SFX menu.



## Target Design

Click **Target Design** from the left panel to configure the display of the target services in the SFX menu.

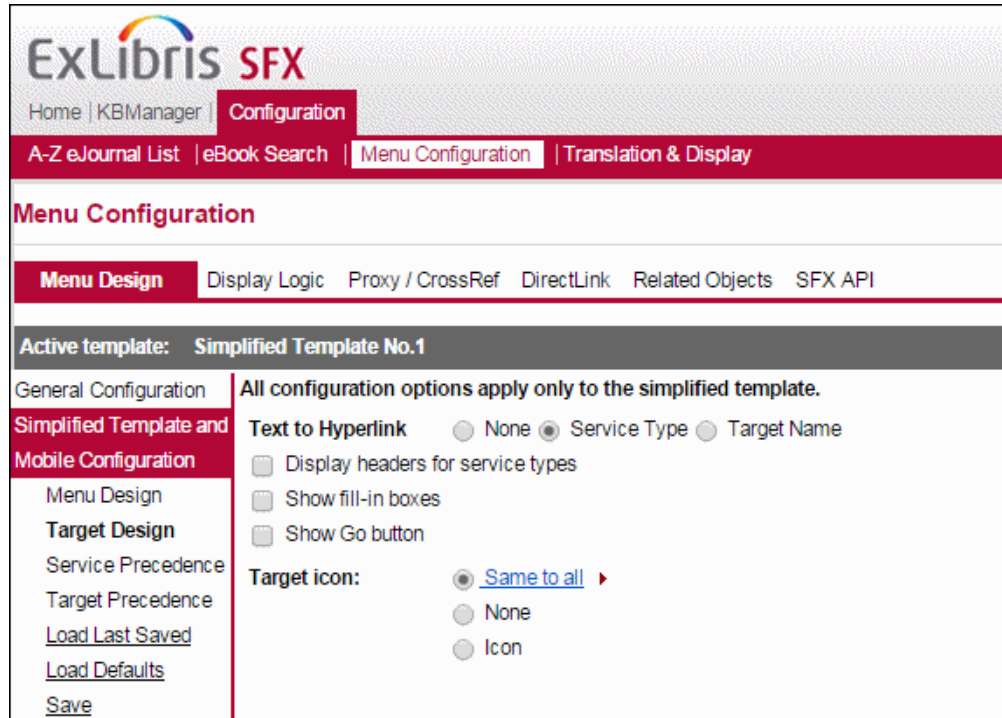


Figure 228: Target Design

The following are the available configuration options:

- **Text to Hyperlink** – This controls which part of the service text is hyperlinked.
  - The options are:
    - **None** – None of the target text is hyperlinked. The only way to link to a target is to click the icon on the left side or click **Go**, if this is available.
    - **Service Type** – Only the service type is hyperlinked.
    - **Target Name** – Only the target public name is hyperlinked.
  - **Display Headers for Service Types** – Select to display a header for each service type. The default is to disable this option.
  - **Show Fill-in Boxes** – Select to display fill-in boxes to edit the record metadata for full-text, getAbstract, and getToc services. The default is to disable this option.
  - **Show Go Button** – Select to display the **Go** button (on the right side of each target). The default is to disable this option.

- **Target Icon** – Controls what is displayed to the left of each target. The options are:
  - **Same to all** – Select to display the same icon for all targets (for example, a small arrow image). To select the image, click **Same to all** or the image, and select or upload a different image.
  - **None** – Select to have no icon displayed for any target. If you select this option, it is recommended to select a text to hyperlink or enable the **Go** button.
  - **Icon** – Select to define an icon for each service type. Selecting this option first displays a preview of the icons available out-of-the-box and allows you to upload or select a new icon. It is also possible to select a blank icon so that no icon is displayed for that service type.

### **Service Precedence**

Click **Service Precedence** from the left pane to configure the order of services in the SFX menu and import preferences previously defined in the configuration files. The following window opens:

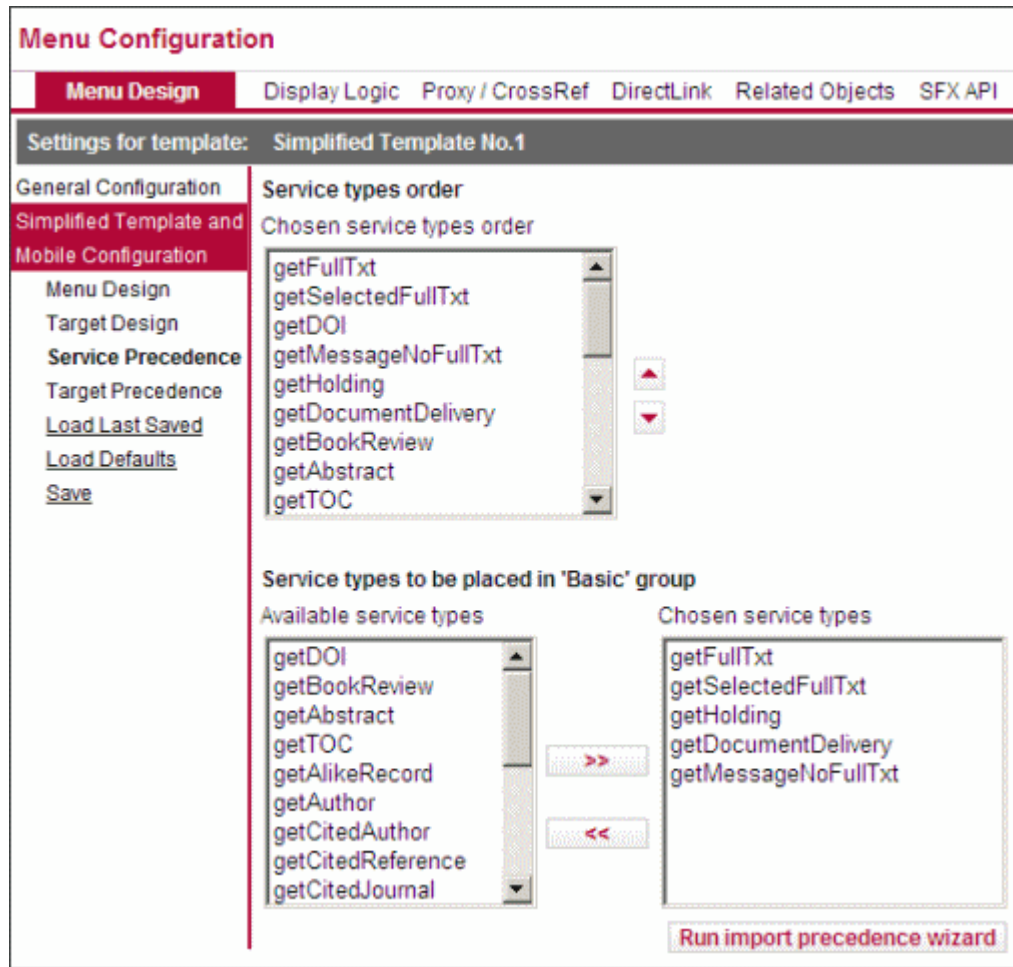


Figure 229: Service Precedence

**NOTE:**

The only service that cannot be configured in the Service Precedence tab is the bX getRecommendation service. This service uses very specific display programs, and its appearance is controlled by the UNIX configuration file, `config/bx.config`. For more information on the configuration of the bX recommendation service, refer to the *bX-SFX Configuration Guide*.

The following are the available configuration options:

- **Service types order** – Determines the order of services in the SFX menu. For example, if the `getFullTxt` service is the first one listed, it is the first service displayed in the SFX menu, if it is available in the list of targets.

Move the service types up or down by selecting them from the list box and using the arrows to the right of the list box.

- **Service types to be placed in 'Basic' group** – Determines which service types are part of the basic group of services versus the advanced group. This is available when the collapsible menu is turned on. To add service types to the basic group, select them from the list box and use the arrows place them in the basic group.

---

**NOTES:**

If the SFX menu is set up to display services in a basic and advanced section, the configuration option **Service types to be placed in 'Basic' group** takes preference over the option to define the order of the service types. The SFX menu behavior is:

- The service types are first separated into Basic / Advanced groups as per the configuration option **Service types to be placed in 'Basic' group**
- Within each group, the order of the service types is according to the **Chosen service types order** option.

- 
- **Run Import Precedence Wizard** – Click to import the current configuration for service precedence used for the advanced SFX menu template. The wizard imports the current settings from the following files:
    - config/services\_public\_name.config\_
    - config/basic\_grouping.config\_
    - config/sort\_services.config\_
    - config/bottom\_list.config\_

## Target Precedence

Click **Target Precedence** from the left pane to configure the order of the target services. The following window opens:

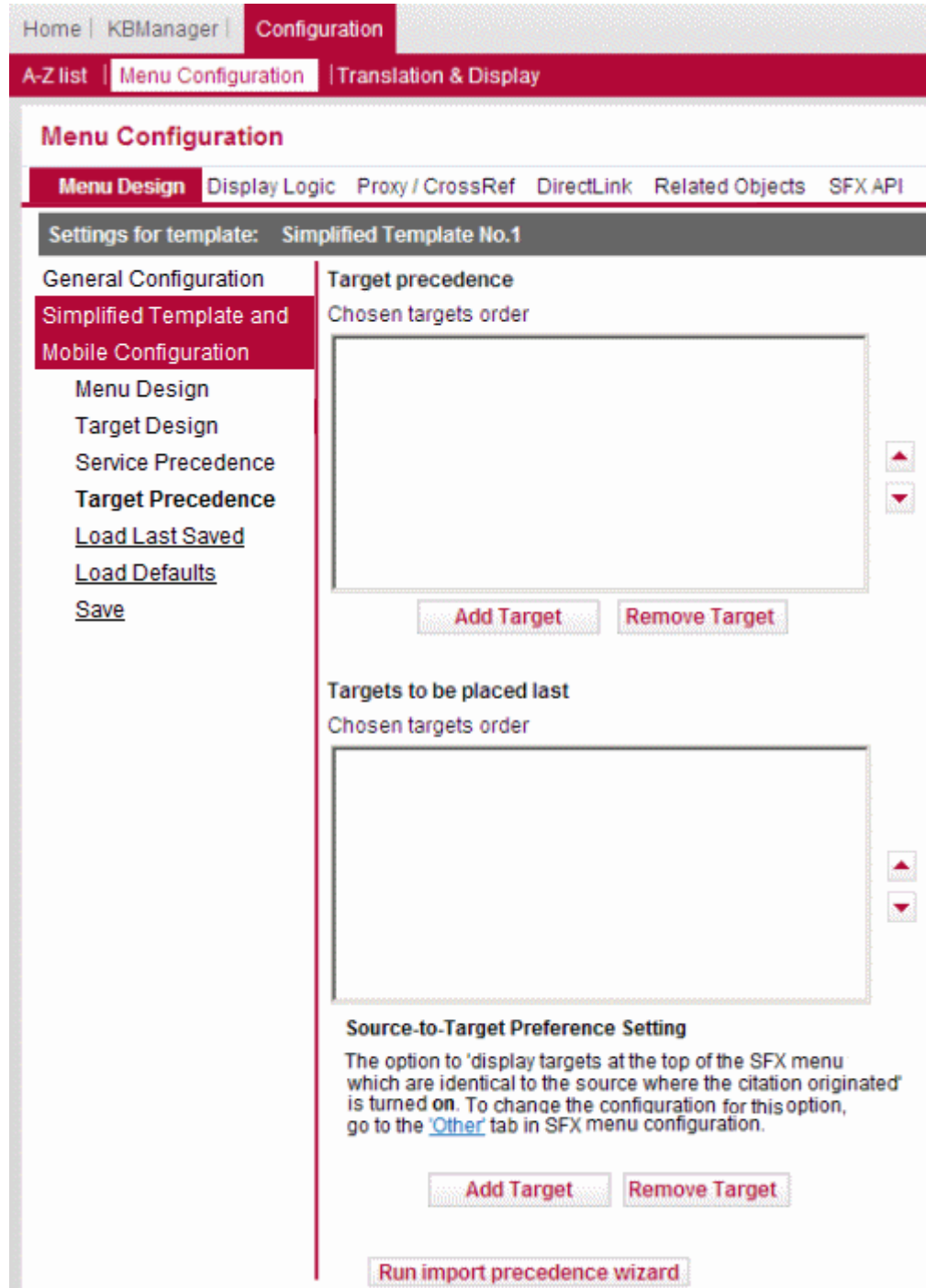


Figure 230: Target Precedence

If several target services of the same type are displayed in the SFX menu, they are displayed, by default, in alphabetical order by target name. Changes can be made to this default alphabetical order using the two sections of the Target Precedence tab.

The following are the available configuration options:

- **Target precedence** – Determines which targets is displayed at the top of the SFX menu target list.
- **Targets to be placed last** –Determines which services are listed at the bottom of the list of services.

Click **Add Target** to add a target to the list.

Click **Remove Target** to remove a target from the list.

Click **Run Import Precedence Wizard** to import the current configuration for target precedence used for the advanced SFX menu template. The wizard imports the current settings from the following files:

- config/services\_public\_name.config\_
- config/basic\_grouping.config\_
- config/sort\_services.config\_
- config/bottom\_list.config\_

If the option is selected in the Other tab, precedence in the SFX menu is given to targets that are identical to the source from which the request originated. (For more information, see [Giving Preference to the Original Source](#) on page 427.)

Note that this functionality overrides any other target sorting options that you indicate, but does not interfere with display logic rules.

## Manual Configuration of Simplified Menu HTML Templates

The simplified menu templates are meant for configuration only via the SFX Admin Center. It is recommended that you not change any template files because this may cause the system to be incompatible with features that Ex Libris may add in the future. It is possible, however, to change the appearance of the SFX menu manually by making additional changes to the images, simplified menu templates, and CSS files.

The files are located in the following locations:

- exlibris/sfx\_ver/sfx4\_1/<instance>/templates/simplified\_template1
- exlibris/sfx\_ver/sfx4\_1/<instance>/templates/css/simplified\_template1
- exlibris/sfx\_ver/sfx4\_1/<instance>/templates/img/simplified\_template1

---

**IMPORTANT:**

When customizing templates, it is recommended not to remove placeholders for the textual elements in the SFX menu that are controlled by the SFX Admin Center's Translations & Display section. Removing the placeholders prevents the textual elements from being displayed.

---

The following is an example of a placeholder:

```
<TMPL_VAR ESCAPE=HTML NAME='MESSAGE("SFX Menu  
Main","Headline--Source")'></th>
```

When making changes to images in the SFX menu, it is recommended not to change the location and names of the images. Rather, replace the original images with your local images. This eliminates the need to make changes to any corresponding `tmpl` files.

### **Changing the CSS File**

The following is a list of changes that can be done in the `.css` file that is used in the simplified menu template:

- To change the background of the menu banner source and title labels:  
Edit: `.headline`  
attribute: `background-color`
- To change the color of the menu banner source and title labels:  
Edit: `.headline table th`  
attribute: `color`
- To change the color of the title and source information in the menu banner:  
Edit: `.headline table td`  
attribute: `color`
- To change the target services background:  
Edit: `.servicesContainer`  
attribute: `background-color`
- To change the font color of the service public names:  
Edit: `.service`  
attribute: `color`  
  
If the service name is hyperlinked in the SFX menu:  
Edit: `.service a`  
attribute: `color`

- To change the font color of target names:

Edit: `.target`

attribute: `color`

If the target is hyperlinked in the SFX menu:

Edit: `.target a`

attribute: `color`

## Changing Images

It is possible to use images of your choice instead of the SFX menu default images. It is recommended to change images using the SFX Admin Center. It is not recommended to change the location and names of the image file. Instead, save the original image (`.gif` file) and replace it with your local image file. This eliminates the need to make changes to any corresponding `.tmpl` files (see the following section).

The following images can be changed:

- The **Verde Info** button

Log on as the instance user and replace the `exlibris/sfx_ver/sfx4_1/<instance>/templates/img/sfxmenu/info.gif` file.

- The background of the language drop-down list

Log on as the instance user and replace the following two files with your files:

- `exlibris/sfx_ver/sfx4_1/<instance>/templates/img/simplified_template1/general/default/langBar_corner.gif`

- `exlibris/sfx_ver/sfx4_1/<instance>/templates/img/simplified_template1/general/default/langBar_bg.gif`

The `langBar_bg.gif` background image is represented as a vertical bar one pixel long that is multiplied to cover the complete banner length.

- The background of the SFX banner

Log on as the instance user and replace the `exlibris/sfx_ver/sfx4_1/<instance>/templates/img/simplified_template1/general/default/top_bg.gif` file:

The background image is a vertical bar one pixel long that is multiplied to cover the complete banner length.

- The background of More Options

Log on as the instance user and replace the following two files with your files:

- `exlibris/sfx_ver/sfx4_1/<instance>/templates/img/simplified_template1/general/default/bar_corner.gif`



- `exlibris/sfx_ver/sfx4_1/<instance>/templates/img/simplified_template1/general/default/bottom_bg.gif`

The background image is a vertical bar one pixel long that is multiplied to cover the complete banner length.

- **The Go button**

The image can be found at: `exlibris/sfx_ver/sfx4_1/<instance>/templates/img/simplified_template1/general/default/button_bg.gif`

The button text is defined in the `exlibris/sfx_ver/sfx4_1/<instance>/templates/simplified_template1/target_list.tpl` file:

In `<TMPL_IF SHOW_GO_BUTTON...>` in `<input>` make changes to the value attribute.

- **The SFX logo**

Log on as the instance user and replace the `exlibris/sfx_ver/sfx4_1/<instance>/templates/img/simplified_template1/general/default/logo.gif` file.

You can remove the SFX logo by logging on as the instance user and editing the `exlibris/sfx_ver/sfx4_1/<instance>/templates/simplified_template1/sfxmenu.tpl` file as follows:

Add `style="display:none"` to the `<img>` tag with `src=logo.gif`

The SFX logo also be changed in the Menu Configuration section of the SFX Admin Center.

- **The SFX logo background image**

Log on as the instance user and replace the `exlibris/sfx_ver/sfx4_1/<instance>/templates/img/simplified_template1/general/default/top_bg.gif` file.

## Display Logic

It is possible to define which services or service types should not appear in the SFX menu, depending on whether other types of services are presented to the user.

To configure the display logic rules of the SFX menu, click the **Display Logic** tab. The following window opens:

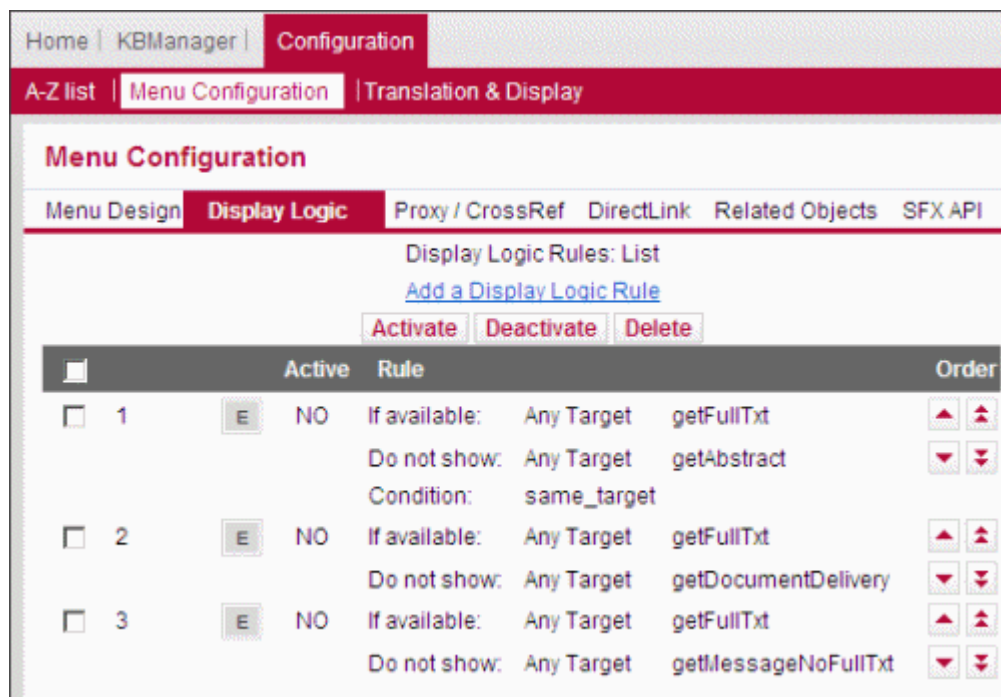


Figure 231: Display Logic

It is possible to define a range of display rules. For example:

- For different services defined for one particular target. For example, if a getFulltext service is displayed for a particular target, do not display a getTOC service for the same target.
- For services defined for all targets. For example, if any getFullTxt service is displayed, do not display any getDocumentDelivery services.
- For a particular target service. For example, if the EBSCO\_ACADEMIC\_SEARCH\_PREMIER getFullTxt service is displayed, do not display any other full-text targets.

**NOTE:**

These default display logic rules are delivered as inactive.

**To activate or deactivate a display logic rule:**

- 1 Select the  check box to the left of the display logic rule.
- 2 Click the **Activate** or **Deactivate** buttons to activate or deactivate a rule.

**To add a new display logic rule:**

- 1 Click **Add a Display Logic Rule**. The following dialog box opens:

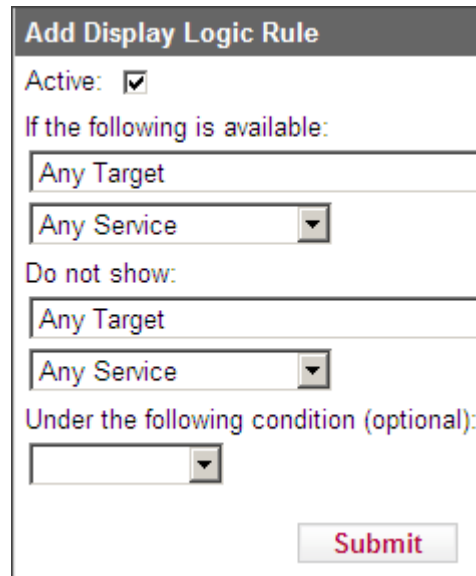


Figure 232: Add Display Logic Rule

- 2 Define the target and target service for which you want to set a condition. You can select **Any Target** or specify a particular target.
- 3 Define the target and target service that you want to suppress. You can select **Any Target** or specify a particular target.

**NOTE:**

The last option in the list is **Other Target**. This option allows customers set up with consortia model 2 to define a display logic rule in the local instance for a target that was created in the shared/remote instance and is not part of the global KnowledgeBase. Since the target does not exist in the local instance, it is not listed in the target drop-down list. Selecting this option displays the Target Internal Name textbox.

- 4 You can optionally select one of the following conditions from the drop-down list:
  - **same\_target** – select if the target in the if the following is available statement is identical to the target in the Do not show statement.
  - **threshold** – select if a threshold statement in perl syntax can be used as a condition, either typed in directly or via the Threshold Composer. For more information on thresholds, see **Thresholds** on page 115.

- **no\_timediff\_warning** – select if at least one target exists in the if the following is available statement without an embargo or moving wall warning. For more information, see [Menu Design – General Configuration](#) on page 423.
- **same\_threshold** – select if you want to exclude services from the SFX menu if they have an identical active threshold.


The following is an example of a rule using this condition:

```
Do not show EBSCOHOST* getFullTxt  
If available EBSCOHOST* getFullTxt  
Condition: same_threshold
```

This rule determines that only one EbscoHost target appears if a journal article is available from two Ebsco packages with the same coverage.

To edit a display logic rule, click the **Edit** button  to the left of the rule.

#### To delete a display logic rule:

- 1 Select the  check box to the left of the display logic rule.
- 2 Click the **Delete** button.

#### To reorder the display logic rules:

Use the arrow buttons to the right of each rule to change the order in which the rules appear.



Figure 233: Arrow Buttons

The single arrows move the rule one step up or down.

The double arrows move the rule to the top or bottom of the list.

#### Examples of Display Logic Rules

- Example 1 – If EBSCO\_ACADEMIC\_SEARCH\_PREMIER getFullTxt exists, do not show any other full-text targets.

This rule looks like the following:

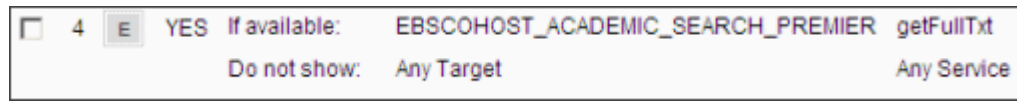


Figure 234: Example 1

- Example 2 – If EBSCO\_ACADEMIC\_SEARCH\_PREMIER getFullTxt exists, suppress EBSCO\_ACADEMIC\_SEARCH\_PREMIER getTOC.

This rule looks like the following:

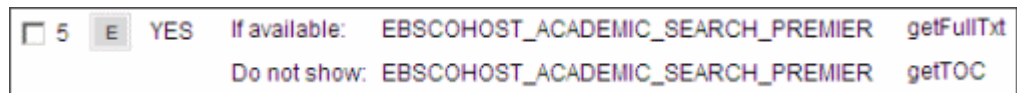


Figure 235: Example 2

- Example 3 – If EBSCO\_ACADEMIC\_SEARCH\_PREMIER getFullTxt exists, suppress PROQUEST\_5000 getFullTxt only if the user is a student.

This rule looks like the following:

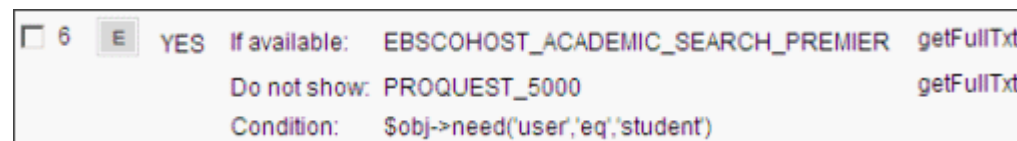


Figure 236: Example 3

- Example 4 – The following special display logic rule is used for the DirectLink banner:

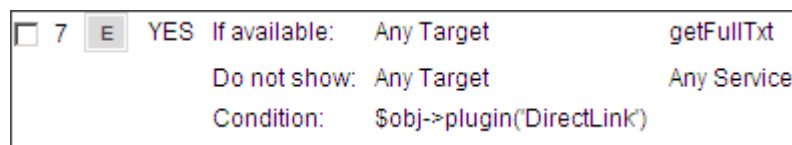


Figure 237: Example 4

For more information on this rule, see [DirectLink Sidebar/DirectLink Banner](#) on page 457.

## Troubleshooting Display Logic Rules

In the HTML source of the SFX menu, you can see which target services were suppressed as a result of these rules. For example:

```
SFXMenu::Services::DisplayLogic::evaluate_display_logic_rules:  
Evaluating Display Logic Rules:HASH(0x1386684) .  
SFXMenu::Services::DisplayLogic::evaluate_display_logic_rules: *  
Started processing rule '4'.  
SFXMenu::Services::DisplayLogic::evaluate_single_display_rule:  
Evaluating rule for services of context object '0'.
```

## Display Logic When Services for Related Objects are Included in the SFX Menu

If services for related objects are included in the SFX menu, display logic rules are calculated separately on the following objects:

- the main object and its closely related objects
- the remotely related objects

This prevents the scenario where display logic rules prevent services for the main object from being displayed, because a remotely related object service appears in the SFX menu.

For an overview of related objects, see [Related Objects](#) on page 346. For a description of closely and remotely related objects, see page [Close Relations](#) on page 465 and [Remote Relations](#) on page 465.

## Proxy/Crossref

This section explains how SFX works with both rewrite proxies and Web proxies. The following proxy types are supported by SFX:

- [Rewrite Proxy](#) on page 446
- [Web Proxy](#) on page 448

## Rewrite Proxy

This is an authentication method to allow off-campus users access to licensed databases. The proxy operates as an intermediary server between end users and the library's licensed databases.

SFX currently supports the following rewrite proxies:

- EZProxy
- EZProxy Encode
- Innovative WAM proxy
- LIBPROXY

■ OpenAthens

---

**NOTE:**

These proxy modules have been tested and implemented with SFX. The location of the corresponding Perl modules is:

```
/exlibris/sfx_ver/sfx4_1/<instance>/lib/Parsers/Proxy/  
<PROXY>.pm
```

Where <PROXY> is the name of the PROXY module as it will appear in the Proxy drop-down list in **SFXAdmin > Menu Configuraton > Proxy**.

With minor adjustments, it may be possible to configure an existing proxy module to work with your own proxy system if it is not one of the supported proxy modules listed above. Note that it is recommended to make a copy of the proxy module before making changes.

If you require SFX to work with a different proxy server, contact your local Ex Libris support representative.

---

When creating target URLs, SFX can direct end users (either for all targets or selective targets) to the institution's proxy server.

For example, instead of creating the following URL:

<http://www.bmj.com>

SFX can create the following URL:

<http://proxy.library.edu/login?url=http://www.bmj.com>

The proxy server determines the IP address of the end user and detects whether this user is accessing the target on campus or off campus.

- If a user is on campus, the user is allowed to go to the target
- If a user is off campus, the user is prompted for the proxy user name/password information. The proxy then connects to licensed databases to obtain Web pages and send them back to the user. Since the proxy runs on a machine on the library's network, the database vendors see the requests as coming from an IP address on the network and therefore permit access.

---

**NOTE:**

If SFX detects that the IP address of the proxy server is identical to the IP address from which the SFX request was sent—that is, the OpenURL request that SFX received came through the proxy server—SFX does not attempt to prefix the proxy address to the target URL, since this is handled by the proxy server itself.

---

## Web Proxy

A small number of SFX sources and targets use HTTP fetch. If you are associated with an institution that uses a Web proxy and want the HTTP requests sent by the SFX server to go through this proxy, follow the instructions detailed in [Configuring Proxy Information](#) on page 448.

The following sources use HTTP fetch:

- PubMed
- CrossRef

The following targets use HTTP fetch:

- EBSCOHost and EBSCO EJS

---

### NOTE:

Squid represents an example of a Web proxy.

---

## Configuring Proxy Information

To configure proxy information, click the **Proxy/CrossRef** tab. The following window opens:

The screenshot shows the ExLibris SFX Configuration interface. At the top, there is a navigation bar with 'Home | KBManager | Configuration' and links for 'OpenURL Generator' and 'Log Off'. Below this is a secondary navigation bar with 'Menu Configuration | Journal Search and A-Z list | eBook Search | Translation & Display'. The main content area is titled 'Menu Configuration' and has several tabs: 'Menu Design', 'Display Logic', 'Proxy / CrossRef' (which is selected), 'DirectLink', 'Related Objects', and 'SFX API'. Under the 'Proxy / CrossRef' tab, there are three sections: 1. 'CrossRef Section' with 'CrossRef connection:  On  Off' and 'Email address for Crossref functionality in SFX:  Submit'. 2. 'Proxy Settings Section' with the message 'No Proxy Settings are defined' and an 'Add Proxy Settings' button. 3. 'TargetURL API Section' with 'Ebsco targetURL API:  On  Off' and a 'Submit' button.

Figure 238: Proxy/CrossRef



The Crossref section allows you to enable or disable the connection to Crossref. By default, the connection is enabled (On). It is possible to disable the connection, for example, in case of technical issues on the Crossref server.

You can specify the email address that is included when connecting to Crossref. This email address is used by Crossref to contact the library in case of problems, and replaces the username and password Crossref required previously.

For information on how the CrossRef connection is used in SFX, refer to the **DOI/CrossRef Setup** section in the *SFX Advanced User's Guide*.

### To add a new proxy setting:

- 1 Click **Add Proxy Settings**. The following dialog box opens:

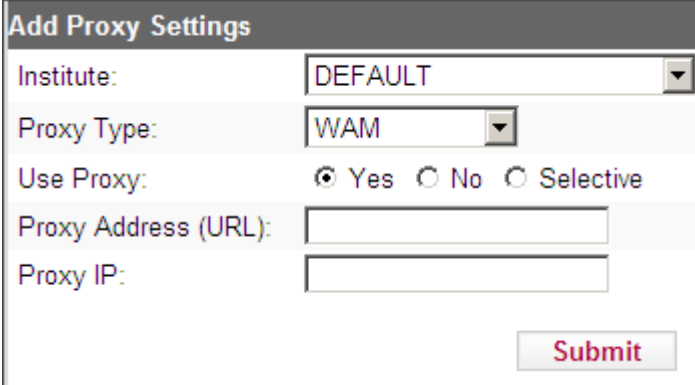


Figure 239: Add Proxy Settings

- 2 From the **Institute** drop-down list, select the institute for which you want to specify a proxy if institutes have been defined in the instance, or **DEFAULT** if no institutes have been set up.
- 3 From the **Proxy Type** drop-down list, select one of the following proxy modules:
  - EZPROXY
  - EZPROXY\_encode
  - LIBPROXY
  - OpenAthens
  - WAM
  - WEB\_PROXY

---

#### NOTE:

For examples on how proxy information is added to the target URL for each proxy option, see **Testing Proxy Configuration** on page 451.

---

- 4 Under **Use Proxy**, select one of the following options:
  - **Yes** – to have proxy support for all target services. Every target service is directed through the proxy server.
  - **No** – to have the browser redirect to the original target URL, as usual. If you select this option, there is no attempt to access the proxy server.
  - **Selective** – to have proxy support only for selected target URLs. If you select this option, only those targets whose target service **Proxy** option is selected are directed through the proxy server. For more information, see [Target Services](#) on page 65.
- 5 In the **Proxy Address (URL)** text box, enter the URL of the proxy server.

---

**NOTES:**

SFX supports the HTTPS protocol for the following proxy types:

- EZPROXY
- WAM
- OpenAthens

For HTTPS, specify the URL by using `https://<proxyserverURL>` in the proxy address (URL).

---

- 6 In the **Proxy IP** text box, enter the IP address of the proxy server.

---

**NOTE:**

If the IP address from which the SFX request is sent does not match the IP address of the proxy server, SFX adds a prefix to the proxy address of the target URL. However, if the IP address of the proxy server is identical to the IP address from which the SFX request is sent (that is, the OpenURL request came through the proxy server), SFX does not add a prefix to the proxy address of the target URL, since the proxy server itself does this.

---

For EzProxy, it is possible to include a list of IP addresses/IP ranges that will be excluded from the proxy mechanism.

To configure this list, access the following configuration file on the SFX server:

```
/exlibris/sfx_ver/<instance>/config/proxy_ezproxy.config
```

The IP information can be specified as a single address or a range of addresses. It is possible to use an asterisk and a hyphen to define IP ranges. See the following example configuration file:

```
Section "exclude_ip"  
#add here ip ranges that you wish to exclude from being  
proxied.  
#a separate line for each range  
10.1.1.1  
10.1.2.11-13  
10.1.4.*  
10.8.0-79.-10.8.81-255.  
11.1..  
EndSection
```

## Testing Proxy Configuration

After you configure a proxy, it is recommended to test the proxy configuration by sending an OpenURL to the SFX instance and verifying whether the correct proxy information has been added to the target URL.

- **Rewrite proxies (WAM, EZProxy, EZPROXY\_encode, LIBPROXY, OpenAthens)**

- WAM: if a regular target URL looks like this:

<http://www.publishersweekly.com>

a correctly proxied target URL looks like this:

<http://0-www.publishersweekly.com.proxy.lib.university.edu/>

- EZProxy: if a regular target URL looks like this:

<http://www.publishersweekly.com>

a correctly proxied target URL looks like this:

<http://proxy.yourlib.org:2048/login?url=http://www.publishersweekly.com>

- EZProxy Encode: if a regular target URL looks like this:

<http://www.akademai.com/openurl.asp?issn=0001-5210&genre=journal>

a correctly proxied target URL looks like this:

<http://proxy.yourlib.org:2048/login?url=http%3A%2F%2Fwww.akademai.com%2Fopenurl.asp%3Fissn%3D0001-5210%26genre%3Djournal>

- LIBPROXY: if a regular target URL looks like this:

<http://www.publishersweekly.com>

a correctly proxied target URL looks like this:

<http://proxy.yourlib.org:2048/login?url=http://www.publishersweekly.com>

- OpenAthens: if a regular target URL looks like this:

<http://www.publishersweekly.com/2012/33/1/56>

a correctly proxied target URL looks like this:

<http://www.publishersweekly.com.proxy.yourlib.org:2048/2012/33/1/56>

- **Testing Web proxies**

Test to make sure the HTTP fetch is working by using the following OpenURL:

```
<base_url>?id=pmid:14972762
```

If the fetch is successful, the banner of the SFX menu will contain text similar to the following:

```
Title Pragmatic principles--methodological pragmatism in the  
principle-based ...  
Source The Journal of medicine and philosophy [0360-5310] Schmidt  
Felzmann yr: 2003 vol: 28 iss: 5-6 pg: 581
```

## Ebsco targetURL API

You can improve linking to EBSCO content (journals and articles) by using the EBSCO API to check availability of items before showing the EBSCO target in the SFX menu and to obtain a direct link. To configure this feature, click the **Proxy/CrossRef** tab. The Ebsco targetURL API section is displayed:

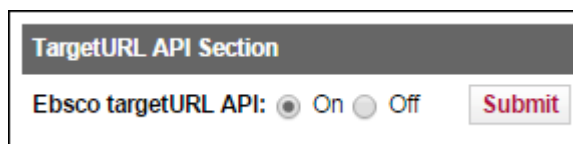


Figure 240: Ebsco targetURL API

Select **On** and click **Submit** to enable the API.

For more information on the Ebsco API, see [Plug-in Program for Ebsco](#) in the *SFX Advanced User's Guide*.

## DirectLink

It is possible to configure SFX to skip the SFX menu and link immediately to a target when coming from any OpenURL-enabled source. This is called DirectLink. When using DirectLink, the SFX menu is not shown; instead, the end user is presented with the target Web page containing the desired content. A banner containing the SFX information and links can be configured to appear on the right side of the page.

DirectLink does not work unless all of the following conditions are met:

- The DirectLink option is turned on in the SFX Admin Center.
- The target service type is specified in the list of allowed services for the DirectLink tool.
- There is only one target service in the SFX menu or the option **Enable DirectLink when multiple targets available** is turned on.
- The target service does not have a special target displayer with a drop-down list.

### **Configuring DirectLink**

Click the **Direct Link** tab. The following window opens:

Home | KBManager | **Configuration**

Menu Configuration | **A-Z eJournal List** | eBook Search | Translation & Display

### Menu Configuration

Menu Design | Display Logic | Proxy / CrossRef | **DirectLink** | Related Objects | SFX API

**DirectLink:**  On  Off

Available Service Types:

getAbstract  
getAlikeRecord  
getAuthor  
getAuthorEmail  
getBookReview  
getCitedAuthor  
getCitedBook  
getCitedGenome  
getCitedJournal  
getCitedRecord

Service Type(s) for which DirectLink should be allowed:

**Enable Menu Banner/Sidebar for DirectLink** ?

For more DirectLink Banner/Sidebar configuration including the choice of sidebar or top banner, refer to the [Menu configuration > Menu Design > DirectLink Banner Configuration](#) section.

The DirectLink banner/sidebar uses frames. Some target platforms do not allow their web content to be displayed in a frame and will show an empty page.

For those targets you can define here an alternative behaviour:

disable DirectLink completely  
 use DirectLink without Menu banner  
 display a link in the DirectLink Banner target frame ?

Enabled Targets:

856\_URL  
ABC\_CLIO\_EBOOKS  
ABC\_CLIO\_HISTORY\_REFERENCE\_ONLINE\_COM  
ACADEMIC\_JOURNALS\_FREE  
ACADEMIE\_ROYALE\_DE\_BELGIQUE\_FREE  
ACLS\_HUMANITIES\_EBOOK  
ACM\_DIGITAL\_LIBRARY  
ACM\_DIGITAL\_LIBRARY\_PROCEEDINGS  
ACQ\_EX\_LIBRIS\_ALEPH  
ACSESS\_DIGITAL\_LIBRARY

Disabled Targets:

ADISONLINE  
AMERICAN\_PHYSICAL\_SOCIETY  
AMERICAN\_PHYSICAL\_SOCIETY  
ELSEVIER\_SCIENCE\_DIRECT\_AL  
LEXISNEXIS\_ACADEMIC  
LEXISNEXIS\_JURISCLASSEUR  
LEXISNEXIS\_KOREA  
LEXISNEXIS\_NETHERLANDS  
LEXIS\_LIBRARY  
NERL\_THIEME\_CONNECT

Enable DirectLink on closely related objects' services ?  
 **Enable DirectLink when multiple targets available** ?  
 Choose first target in list  
 Choose according to target linking level ?

**Disable DirectLink when additional information available in:** ?

Authentication field  
 Note field  
 **Enable Source Filtering for DirectLink** ?

Allowed Sources:

ABC\_CLIO  
AMS\_MATHSCINET  
ANNUAL\_REVIEWS  
ARXIV  
BIOMED\_CENTRAL  
BOWKER\_ULRICHSWEB  
BREPOLS  
BX\_HOTARTICLE  
CAMBRIDGE\_SCIENTIFIC\_ABSTRACTS  
CHADWYCK\_HEALEY

Forbidden Sources:

Figure 241: DirectLink

The following configuration options are available:

- **DirectLink** – Select **On** to enable DirectLink.
- **Target Services** – Select the target services that you want available for direct linking from the box on the left and click the arrow button to move them to the box on the right. If the OpenURL requests a target service that you have not selected, the SFX menu is displayed and not the DirectLink.
- **Enable Menu Banner/Sidebar for DirectLink** – Select to display the SFX menu banner above the target or the SFX menu sidebar on the side of the page. For more information, see [DirectLink Sidebar/DirectLink Banner](#) on page 457.

The DirectLink banner/sidebar uses frames. Some target platforms do not allow their web content to be displayed in a frame and will show an empty page. For those targets, you can define an alternative behavior:

- **Disable DirectLink completely** – DirectLink is completely disabled
- **Use DirectLink without Menu banner** – DirectLink is enabled, but the DirectLink banner is not displayed
- **Display a link in the DirectBanner target frame** – display the DirectLink sidebar that has a link that opens the vendor Web page in a separate browser window. (This option is only displayed if you select **DirectLink Banner V2 - Sidebar** in the **DirectLink Banner Configuration** tab.)
- **Enable DirectLink on closely related objects' services** – Select to enable DirectLink for services of closely related objects. Close relation types are:
  - Proceeding Series
  - Proceeding
  - Other edition
- **Enable DirectLink when multiple targets available in the SFX menu** – Select to enable DirectLink even when SFX finds more than one available target. The target selected can be:
  - The first target in the list
  - The target with the deepest linking level. The linking level is determined according to the **Linking level** field in the target service and object portfolio tables.



---

**NOTES:**

- This option is not relevant if the **Enable Menu Banner for DirectLink** option is selected.
  - Even if this option is not selected, the DirectLink menu banner is displayed if more than one target is available, if the display logic rule in **Figure 246** on page **462** is activated.
- 
- **Disable DirectLink when additional information available in** – Select **Authentication** field and/or **Note** field. It is possible to disable DirectLink when the object portfolio, target service, or target contains a value in the **Authentication** or **Note** field– for example, if the e-journal has a user name or password that must be displayed to the end user via the SFX menu.
  - **Enable Source Filtering for DirectLink** – Select sources that you do not want available for direct linking from the box on the left and click the arrow button to move them to the box on the right. If the OpenURL originates from sources that you have selected, the SFX menu is displayed and not the DirectLink.

### **DirectLink Sidebar/DirectLink Banner**

You can configure SFX to display a DirectLink menu sidebar on the target web page. When DirectLink is enabled, the DirectLink menu sidebar is displayed on the side of the target.

---

**NOTE:**

The DirectLink menu top banner has been replaced by the sidebar and should no longer be used.

---

The DirectLink menu sidebar displays the following:

- A sidebar image
- The Source section of the SFX menu (with information about the reference in which the user is interested)
- A **Help** link to send feedback or report a problem to the library, similar to the LOCAL\_FEEDBACK target in the regular SFX menu
- An arrow icon to hide the DirectLink menu sidebar and view the target in the full page
- A **More** link to open the full SFX menu in a separate browser window.
- A link in the DirectLink Banner target frame (if the target does not support the display of its content in a frame, and the DirectLink banner display for these targets has been configured to display a link).

The following are examples of a DirectLink menu sidebar and a DirectLink menu sidebar with a link in the DirectLink target frame:

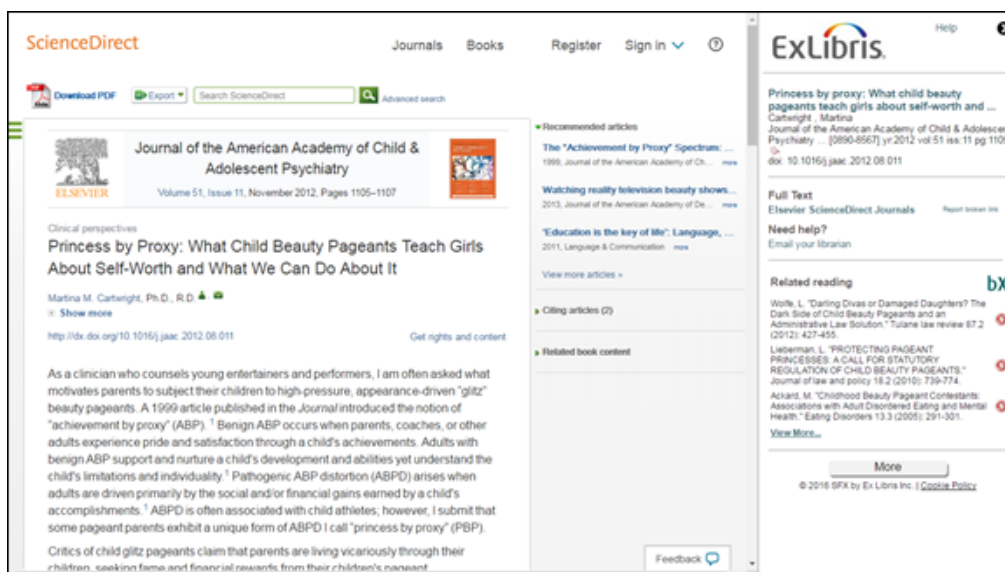


Figure 242: DirectLink Menu Sidebar

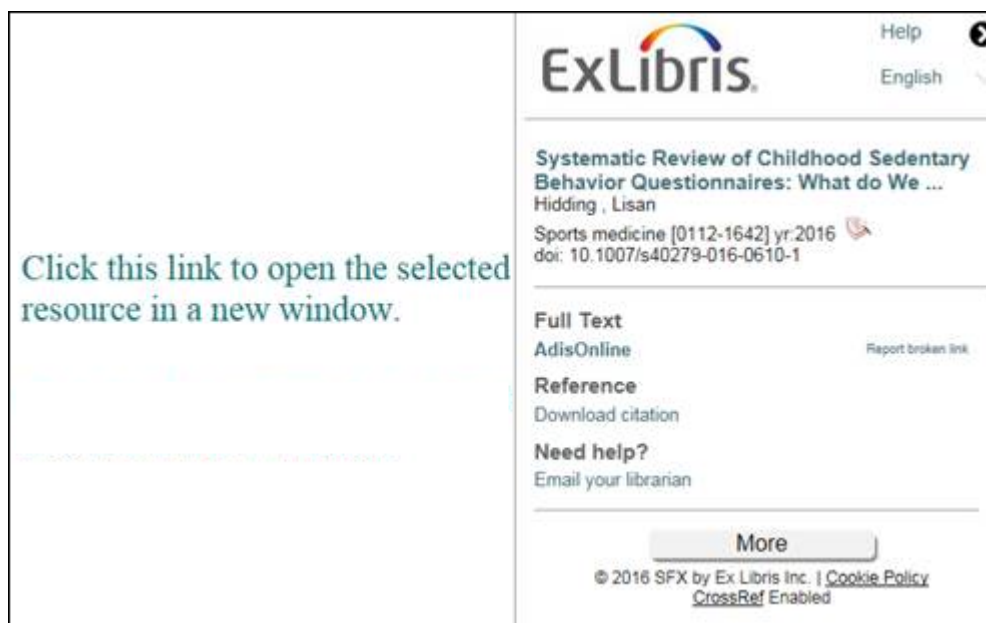


Figure 243: DirectLink Menu Sidebar with a link in the DirectLink Target Frame

### To activate the DirectLink menu sidebar:

From the DirectLink Banner Configuration tab (**Setup & Administration > Configuration > Menu Configuration > Menu Design**), select **DirectLink Banner V2 - Sidebar**.

**DirectLink banner/sidebar configuration**

Menu Design | Display Logic | Proxy / CrossRef | DirectLink | Related Objects | SFX API

**Configuration for Direct Link SideBar**

General Configuration  
Simplified Template and Mobile Configuration  
Multi-object menu Configuration  
**DirectLink banner configuration**

DirectLink banner/sidebar is an abbreviated SFX menu format to allow display of the SFX menu as a banner on top of, or a sidebar beside the publisher website. The DirectLink banner/sidebar will display in case DirectLink has been activated in the [Menu configuration > DirectLink](#) configuration section.

**Active direct link banner:**  
DirectLink Banner V1 - Top Banner  
DirectLink Banner V2 - Sidebar

**Active CSS file for DirectLink Banner:** ?  
You are currently using the default CSS file without customizations.  
 Only default CSS [Download](#)  
 Customizations to the default CSS [Download](#) [Select file](#)  ?  
 Test CSS ?

Sidebar is minimized after  seconds

**Select for which types of services, targets will be displayed in the sidebar:** ?

Available service types	Chosen service types
getDOI getMessageNoFullTxt getBookReview getAbstract getTOC getAlikeRecord getAuthor getCitedAuthor getCitedReference	getFullTxt getSelectedFullTxt getHolding getDocumentDelivery getRecommendation

Define maximum number of targets to display per Service Type.  ?

Define Email Address(s) for the 'Help' option:  ?

**Show Peer-reviewed indication:**   
 Text  Image  
Currently used image ?   
[Select image](#)

**Select banner image:** ?  
Currently used image ?   
[Select image](#)

**Select banner image for minimized sidebar:** ?  
Currently used image ?   
[Select image](#)

**Select banner image for mobile minimized sidebar:** ?  
Currently used image ?   
[Select image](#)

Figure 244: DirectLink Menu Sidebar Configuration

The following options are available:

- Use only the default CSS – select this option to use the default CSS for the DirectLink menu banner. Click **Download** to download a CSS that you can customize.

- Customize the default CSS – select this option to use a customized CSS for the DirectLink menu banner. Click **Download** to download a customized CSS. Click **Select File**, select a CSS file, and click **Submit** to upload a customized CSS.
- Test CSS – Select this option when testing a customized CSS file. Select a CSS file from the drop-down list and enter an IP address to restrict use of the CSS file to that address. Test the CSS with the OpenURL generator or the KB Manager test button for a record with active full text and view the DirectLink sidebar with the customized CSS.
- Sidebar is minimized after X seconds – Enter the number of seconds after which the DirectLink Sidebar is minimized
- Select which types of services will be available in the sidebar
- Define the maximum number of targets to display per service type
- Define the email addresses for the Help option
- Show peer-reviewed indication and select to use a text or image indication
- Select a banner image for:
  - The peer-reviewed indication
  - Banner image
  - Banner imaged for minimized sidebar
  - Banner image for mobile minimized sidebar

---

**NOTES:**

- If you change an image, the new image must have a different name than the old image or the old image is displayed.
  - Image file names cannot have spaces in them.
- 

The DirectLink menu top banner displays the following:

- A banner image
- The Source section of the SFX menu (with information about the reference in which the user is interested)
- The following links:
  - to view the regular SFX menu instead of the DirectLink menu banner screen
  - to report a problem or send feedback to the library, similar to the LOCAL\_FEEDBACK target in the regular SFX menu
  - to hide the DirectLink menu banner and view the target in the full page

The following is an example of a DirectLink menu top banner:

The screenshot displays the ExLibris website interface. At the top, the ExLibris logo and tagline 'The bridge to knowledge' are visible. Below this, a red-bordered banner contains the source information 'source: Basic histology [0891-2106]' and links for 'report a problem', 'view menu', and 'hide frame'. The main navigation bar includes links for 'A-Z Index', 'Librarians', 'Newsletter', 'Subscriptions', 'About', 'Advisory Board', 'Contact Us', and 'Help'. The 'ACCESS Medicine from McGraw-Hill' logo is prominently displayed, along with a '(Log In)' button. A secondary navigation bar lists various content types: 'Home', 'Textbooks', 'Multimedia', 'Q&A', 'Drugs', 'Updates', 'Images', 'Dx Tests', 'DDx', 'Guidelines', 'Quick Answers', 'Case Files', 'Patient Ed', and 'News'. A search bar is present with a dropdown menu set to 'All AccessMedicine' and a 'search' button. Additional search options include 'Enable Autosuggest', 'Advanced Search', and 'About Search'. The main content area features a book cover for 'Junqueira's Basic Histology: Text & Atlas, 12e' by Anthony L. Mescher. Below the cover are links for 'Preface', 'Copyright', 'Authors', and 'Figure Credits'. A 'CONTENTS' section lists 'Chapter 1 Histology & Its Methods of Study', 'Chapter 2 The Cytoplasm', and 'Chapter 3 The Cell Nucleus'. A 'Features' box highlights 'LANGE Case Files™' with the text 'Apply your knowledge to real-life clinical cases! Prepare for tough questions on rotations and ace exams.' and a 'View Cases' link.

Figure 245: DirectLink Banner

### To activate the DirectLink menu top banner:

- 1 From the DirectLink Banner Configuration tab (**Setup & Administration > Configuration > Menu Configuration > Menu Design**), select **DirectLink Banner V1 - Top Banner**.
- 2 Configure the `ctx_object.config` file in the `config` directory of your instance by adding the following new section:

```
#For mixed directLink page.
Section "mix_html_menu"
  debugging      "0"
  log            "$ENV{SFXCTRL_HOME}/logs/sfxmenu"
  timer         "0"
  keep_log      "0"
  debug_ip_range "*. *.*.*.*"
  grouping      "Y"
  collapsible   "Y"
  user_must_pick_single_object "1"
  template      "$ENV{SFXCTRL_HOME}/templates/sfxmenu/
mix_sfxmenu.tmpl"
  verde_link    "0"
  mail_to       "your@email_address.here"
EndSection
```

- 3 In the `mail_to` line, add the e-mail address to be used when clicking the **report a problem** link that is displayed in the menu banner.

---

#### NOTE:

Verify that this section does not already exist before you try adding it. An error message is displayed in the SFX menu if you turn on the DirectLink menu banner without the new section in the `config/ctx_object.config` file.

---

- 4 Select **On** under **DirectLink**. See **Figure 241 DirectLink** on page 455.
- 5 In the **Display Logic** tab, make sure that the following display logic rule is active and is the last one in the list:

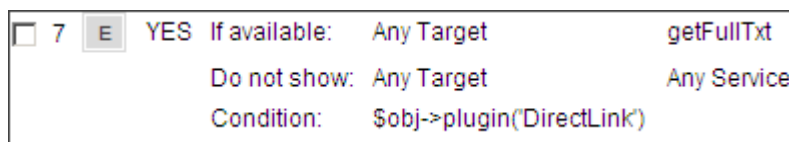


Figure 246: Display Logic Rule

This rule is activated automatically when you select **Enable Menu Banner for DirectLink**.

This rule makes sure that DirectLink is activated for every SFX menu that has at least one full-text service and suppresses all but the first full-text

service. If you have set other display logic rules to define the preferences of one full-text service over another, make sure this new rule appears at the bottom of your list so that it is applied only after the other rules.

The condition in the rule ensures that the suppression of the other services occurs only when following the DirectLink. When selecting **View the full SFX menu** from the **view menu** link on the menu banner, this display logic rule makes it possible to click in the banner and see the full SFX menu with all available services.

It is possible to add an additional threshold to the current condition, such as:

```
Condition: $obj->plugIn('DirectLink') && $obj->need('sfx.sid','ne','ALEPH:EXU01')
```

The above threshold prevents the DirectLink feature from being enabled when the user contacts SFX from Aleph.

```
Condition: $obj->plugIn('DirectLink') && $obj->need('sfx.sid','ne','sfxit.com:azlist')
```

The above threshold prevents the DirectLink feature from being enabled when the user contacts SFX from the SFX A-Z List.

- 6 Configure the display of the DirectLink menu banner from the `templates/sfxmenu/mix_sfxmenu.tpl` HTML template file.

To change the fonts and colors of the text displayed in the banner, enter formatting information in the following section. Note that it is very important to maintain the structure of the file and not change the text outside the `<STYLE>` tags.

```
tm.write('<STYLE>A, A:HOVER, A:VISITED
{float:right;clear:none;padding-top:2px;font-size:70%;font-family:TAHOMA,ARIAL,VERDANA;padding-left:5px;padding-right:5px;text-decoration:underline;color:#CC6633;font-weight:bold;}</STYLE>');
```

The image shown in the banner, by default, is the following one:

```
/templates/img/sfxmenu/header.gif
```

This is the same header image as displayed in the main SFX menu window.

- 7 In the **DirectLink** tab (see [Figure 241](#) on page 455), select the targets for which you do not want the DirectLink banner displayed and select one of the following options:
  - **Disable DirectLink completely** – DirectLink is completely disabled
  - **Use DirectLink without Menu banner** – DirectLink is enabled, but the DirectLink banner is not displayed

## Related Objects

For an overview of related objects, see [Related Objects](#) on page 346.

The following is an example of the SFX menu with services for a related object.

ExLibris The bridge to knowledge  
ExLibris SFX Language English

Source: BMJ. British medical journal (Compact ed.) [0959-535X]

**Basic**

**Full text**

No Full text available **for this item.**

**Advanced**

**Full text for other editions**

Related to: BMJ. British medical journal [0959-8138]

Full text available via **BMJ Journals Online Archive**

Year:  Volume:  Issue:  Start Page:  **GO**

Available from 1840 volume: 1 issue: 1

Full text available via **EBSCOhost Electronic Journals Service**

Year:  Volume:  Issue:  Start Page:  **GO**

Available from 1994 volume: 308 issue: 6920

Figure 247: SFX Services for This Record

In the example, the object sent in the OpenURL has no full-text available. However, SFX has detected that a full-text service exists for a related object, and this is presented in the SFX menu. The related services—for example, **Full text for related titles**—is displayed by default as a section of the SFX menu, as are other service types (for example, **Full-text** or **Holding information**).

Relation information is stored in the SFX KnowledgeBase `KB_RELATIONS` table and can be seen in the Search Object results in KBManager. For more information on objects, see [Objects](#) on page 88.

For example:

```
Title Civil engineering systems
ISSN 0263-0257
OBJECT_ID 954926969983
Is continued by:
Title Civil engineering and environmental systems
ISSN 1028-6608
OBJECT_ID954925587322
```



## **Relation Types Used in SFX**

See [Table 8 Relation Types Used in SFX](#) on page 95 for an explanation of the relation types used in SFX.

If the related object feature is turned on in the SFX menu, a distinction is made between close relations—where the full text of the related object is identical or very close to the original object requested—and more remote relations.

### **Close Relations**

If the object requested in the OpenURL has related objects with close relations, services from the related object can be included in the SFX menu with no indication that these are services for the related object.

Close relation types are:

- Proceeding series
- Proceeding
- Other book edition

To the end user, it appears as if these services are for the object sent in the OpenURL. Since the relation type is very close, it can be considered equivalent, and as far as the user is concerned no distinction has to be made.

---

#### **NOTE:**

The display of closely related object services can be configured. For more information, see [Configuring Related Objects](#) on page 348.

---

### **Remote Relations**

For more distant relation types defined in the SFX KnowledgeBase, the services of the related object are not displayed in the SFX menu as regular services, but are displayed separately with an indication that these services are for related objects. This is the case for the following remote relation types:

- Absorbed by
- Absorbed in part by
- Continued by
- Continued in part by
- Continues
- Continues in part
- Formed by the union of
- Merged into
- Other edition

- Related to
- Split into
- Supplement parent
- Supplement
- Translated as

If two objects are related to each other and are available via the same target, the following behavior occurs:

- For closely related objects, the service for the related object is not displayed in the SFX menu. Only the target for the core object, for which the OpenURL is sent, is displayed. This is called deduplication of services for related objects.
- For remote related objects, where a link to the same service may be valuable, the same service is displayed for both the core object and the related object. Deduplication of services does not occur.

The behavior of remote related objects can be changed so that deduplication occurs using the related object configuration options.


In order to avoid very large sets of services for related objects, SFX does not display in the SFX menu, services of type `SERIES_ITEM` (especially in case of parent – child relations, from `SERIES` to a list of series items).

Additionally, if there are more than five related objects for an object, the RSI index is checked regarding active services for the request before performing augmentation. Augmentation and calculation of services is done only for those related objects where RSI indicates that there is at least one service that is displayed in the SFX menu.

For more information on building the RSI index, refer to the **Rapid Service Indicator** section of the *SFX System Administration Guide*.

### **Configuring Related Objects**

To configure Related Objects, click the **Related Objects** tab. The following is displayed:


OpenURL Generator | Log Off

Home | KBManager | **Configuration**

Menu Configuration
Journal Search and A-Z list
eBook Search
Translation & Display

### Menu Configuration

Menu Design
Display Logic
Proxy / CrossRef
DirectLink
Related Objects
SFX API

This section allows you to define the display of link services for related objects in the SFX menu ([more info below](#))

**Include related object services in SFX menu:**

Serials:  On  Off

Available Relation Types:

>>

<<

Relation Type(s) for which related objects should be allowed:

ABSORBED

ABSORBED\_BY

ABSORBED\_IN\_PART

ABSORBED\_IN\_PART\_BY

CONTINUES

CONTINUED\_BY

CONTINUES\_IN\_PART

CONTINUED\_IN\_PART\_BY

FORMED\_BY\_THE\_UNION\_OF

MERGED\_INTO

Monographs:  On  Off

Available Relation Types:

>>

<<

Relation Type(s) for which related objects should be allowed:

ABSORBED

ABSORBED\_BY

ABSORBED\_IN\_PART

ABSORBED\_IN\_PART\_BY

CONTINUES

CONTINUED\_BY

CONTINUES\_IN\_PART

CONTINUED\_IN\_PART\_BY

FORMED\_BY\_THE\_UNION\_OF

MERGED\_INTO

**Choose the service type that you would like to display for a related object**

Select: [All](#) [None](#)

getFullTxt (electronic full text)

getSelectedFullTxt (electronic full text for journals partially available online)

getHolding (e.g. your OPAC)

getAbstract (Abstract services)

getTOC (Table of Contents services)

**Choose how closely related objects should be displayed** ([more info below](#))

with no indication that these services are for the related object ?

separately from regular services with an indication that these services are for related object ?

**Choose where remotely related objects should be displayed** ([more info below](#)) ?

right below services of the same type

in the SFX menu Advanced section

Do not display services for related objects if same service type (e.g. full text) is available for the original object

Use deduplication of target services for remote related objects ?

Figure 248: Related Objects

The following configuration options are available:

- **Include related object services in SFX menu**
  - **Serials** – Select **On** to include related object services for Serials in the SFX menu. By default, the related object display is on.  
Using the arrows, move the relation types for serials that you want allowed to the box on the right.
  - **Monographs** – Select **On** to include related object services for Monographs in the SFX menu. By default, the related object display is on.  
Using the arrows, move the relation types for monographs that you want allowed to the box on the right.
- **Choose the service type that you would like to be displayed for related objects** – The following options are available: getAbstract, getFullTxt, getSelectedFullTxt, getTOC, or getHolding. By default, getFullTxt and getSelectedFullTxt are selected.
- **Choose how closely related objects should be displayed**
  - **with no indication that these services are for the related object** – Select to display closely related objects together with services for the object sent in the OpenURL.
  - **separately from regular services with an indication that these services are for related objects** – Select to display closely related objects in a separate list. Closely related objects are displayed in the location you select to have remotely related objects displayed.
- **Choose where remotely related objects should be displayed**
  - **right below services of the same type** – Select to have services displayed right below services of the same type
  - **in the SFX menu Advanced section** – Select to have services displayed in the advanced section of the SFX menu. By default, services for related objects are displayed in the advanced section of the SFX menu.
- **Do not display services for related objects if same service type (e.g. fulltext) is available for the original object** – Select to prevent the display of related objects with the same service type as the original object.
- **Use deduplication of target services for remote related objects** – If selected, a service for remotely related objects is not displayed if the same target service (for example, full text for Ebsco Academic Search Elite) is displayed in the SFX menu for the core object or closely related object.



ExLibris SFX

**Source:** PCR Protocols [0-89603-642-1]  
yr:2003

- ▶ The requested version of your document is not available.  
If alternatives are available, they are listed below.

[More Options](#) ▲

---

Related to: PCR Protocols: Second Edition [0-89603-627-8; 1-59259-384-4]

- ▶ [Full text available via netLibrary](#)

Figure 249: Full-Text for Related Object

### Translation

The wording for the relation types and default service grouping headers can be changed and translated. In the Relation Types tab, under Translations & Display, it is possible to define the wording for the display of the different types of relations. See [Translations and Display](#) on page 481 for more information.

### Related Book Services in SFX

Unlike related object information for journals and e-books that is stored in the SFX database, related object information for books is available only from services such as LibraryThing's ThingISBN.

Related book services allow for lookups of ISBNs. It is possible to send an ISBN and receive a set of related ISBNs in return (that pertain to the same text but to different manifestations of it, such as paperback versus hardback, first edition versus second edition, or different language editions of the same text). This may be useful for linking when a user clicks the SFX button and sends one ISBN to SFX, but the active full-text portfolio or OPAC record exists for another edition and a different ISBN.

SFX uses the ThingISBN from LibraryThing book service.

ThingISBN is a service that retrieves a list of ISBNs associated with a submitted ISBN, based on the LibraryThing database of books. LibraryThing is a social cataloging Web application for storing and sharing personal library catalogs and book lists. Its database contains books and other material cataloged by

LibraryThing members. The service is free and available for non-commercial use only. You cannot send more than one ThingISBN request per second, and you must notify LibraryThing if usage of the service exceeds 1,000 requests per day.

Additional information regarding the ThingISBN service can be found at:

[http://www.librarything.com/thingology/2006/06/introducing-thingisbn\\_14.php](http://www.librarything.com/thingology/2006/06/introducing-thingisbn_14.php)

---

**NOTE:**

xISBN is no longer supported.

---

### **Configuring Related Book Services**

Determine the following options before proceeding with the configuration of related book services:

- The point during the SFX workflow at which the related book service is queried. It can occur during one of the following operations:
  - Related Book Augmentation – Augmentation with additional ISBNs when loading the SFX menu for all book requests
  - Related Book Target Lookup – Lookup of additional ISBNs only when linking to the OPAC (Aleph or Voyager). In the future, all catalogs that allow multiple ISBN searching with Boolean or statement will be adapted.
- How to handle ISBNs for editions of the book in different languages.

### **Related Book Augmentation**

SFX performs an ISBN lookup for every OpenURL with an ISBN that is sent to the SFX server. This occurs at the start of the SFX flow, when the OpenURL is received by SFX, before the augmentation from the SFX KnowledgeBase starts.

After the related book service lookup of an ISBN, the array of related ISBNs is added to the ContextObject. This array of related ISBNs is used from this point going forward, for the following purposes:

- Checking for active portfolios in the SFX KnowledgeBase
- Querying the OPAC using the Aleph plug-in
- Target linking in the Aleph and Voyager OPAC
- Linking to the Google Book Search target

This option is recommended, as it allows the maximum use of related ISBN information and is also good for customers using the Aleph plug-in. Note that this option may have an impact on the performance of the SFX menu, since the lookup takes place before the SFX menu is displayed. A time-out value is configured to limit the delay if the related book service is down.

The following is an example of a related ISBN array in the ContextObject:

```
sfx.related_isbn| => {
  |close| => [
    |0-374-11394-7|,
    |0-15-600329-5|,
    |0-571-16892-2|,
    |0-571-22525-X|
  ],
  |remote| => [
    |965-07-0793-X|
  ]
}
```

### **Related Book Target Lookup**

SFX performs an ISBN lookup only after the user has selected to link to the Aleph or Voyager OPAC target. The lookup is performed as part of the target parser. In the future, all catalogs that allow multiple ISBN searching with Boolean OR statements will be adapted to use multiple ISBNs.

The following are the advantages of the related book target lookup:

- It is performed before searching the OPAC, avoiding any impact on SFX menu performance.
- It involves lower usage of the related book service.

The disadvantage of the related book target lookup is that it can be performed only when a target is selected. Additional book information cannot be used for SFX menu augmentation or plug-in purposes.

### **Handling Editions in Different Languages**

By default, SFX works only with the ContextObject related ISBNs that are in the same language as the original ISBN requested. These related ISBNs behave in the same manner as other closely related objects defined in the SFX KnowledgeBase.

This means that:

- When an active full-text object portfolio exists for a related ISBN, the full-text service is presented in the SFX menu as if it is a service for the original object.
- When performing an Aleph plug-in check, all related ISBNs are used in Boolean OR searches.
- When performing a search in the Aleph or Voyager OPAC, all related ISBNs are used in Boolean OR searches.

However, it is possible to configure the service to also use other language editions. This needs to be defined in the configuration file described in

**Handling Editions in Different Languages** on page 471. Other language edition ISBNs are treated as remote related objects. This means that:

- When an active full text portfolio exists for a remotely related ISBN, the full text service is presented in the SFX menu with an indication of the relation and the ISBN of the related object.
- Remote related ISBNs are not included when performing an Aleph plug-in check or when searching the Aleph or Voyager OPAC.

### ***Implementation Instructions***

#### **To implement a related book service:**

- 1 Add the following section to the `config/ctx_object.config` configuration file:

```
Section "related_isbn"  
  <include:$ENV{SFXCTRL_HOME}/config/related_isbn.config_>  
EndSection
```



**2 Configure the config/related\_isbn.config file with the following text:**

```

Section "general_settings"
  use_related_isbn_lookup      "0"
  # possible methods are xISBN or thingISBN
  method "thingISBN"
  # base url for OCLC xISBN service
  xISBN_baseurl                "http://xisbn.worldcat.org/
webservices/xid/isbn/"
  # base url for thingISBN service
  thingISBN_baseurl            "http://www.librarything.com/
api/thingISBN/"
  # possible types are augmentation or target_parser
  query_type                   "augmentation"
  # related ISBN query timeout in seconds
  query_timeout                "3"
  maximum_results_to_use      "10"
  # use/do not use ISBNs in languages different from originating ISBN
  use_additional_languages     "1"
  # include/do not include OCLC affiliate id in request for statistics
  use_affiliate_id             "0"
EndSection

Section "subscription"
  use_subscription              "0"
  # possible values are token or ip
  subscription_type            "ip"
  # ip address of SFX server or gateway
  ip                            ""
  # for access token subscription
  token                          ""
  # for access token subscription: secret token value
  secret                         ""
  # for ip controlled access and statistics
  affiliate_id                  ""
EndSection

```

## General Configuration

### To configure related services:

- 1 Turn on the related book feature by setting the value of the `use_related_isbn_lookup` parameter to 1:

```
use_related_isbn_lookup      "1"
```

- 2 Define `thingISBN` as the book service to use:

```
method                       "thingISBN"
```

- 3 Define when to retrieve related book information. Either `augmentation` for related book augmentation when loading the SFX menu or `target_parser` for related book target lookup when linking to the Aleph or Voyager OPAC.

```
query_type          "augmentation"
```

- 4 Define whether to accept ISBNs in languages different than those in the original ISBN. Set this value to 0 to block these ISBN values, or to 1 to accept them:

```
use_additional_languages  "1"
```

If you set this parameter to 1, you must also define which additional languages should be accepted as related ISBNs in the `languages` section at the bottom of the configuration file.

In the example below, changing the value next to the language Afrikaans from 0 to 1 enables the acceptance of ISBNs for editions of the original book in Afrikaans as related to the original ISBN:

```
Afrikaans          "0"
```

## SFX API

For information concerning this tab, see the Developer Network (<https://developers.exlibrisgroup.com>).

## Additional SFX Menu Configurations

Wording changes and translations for the simplified SFX menu template are performed in the Translations & Display section. See [Translations and Display](#) on page 481 for more information.

## Hebrew SFX Menu

When you select Hebrew from the language drop-down list in the A-Z list the SFX menu is displayed in Hebrew:

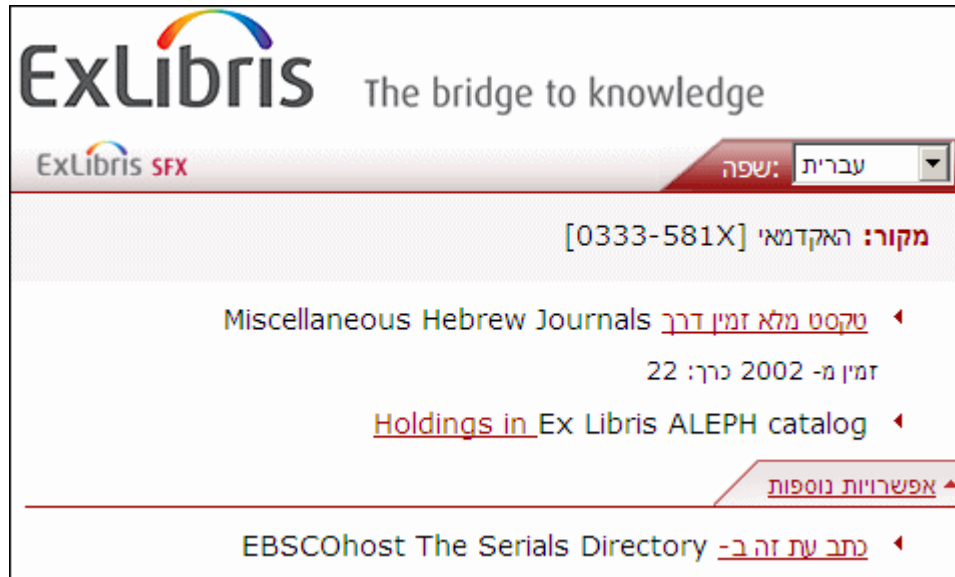


Figure 250: Hebrew SFX Menu

The following elements are now displayed right-aligned:

- sources
- target services
- the arrows that point to the target services (if you have selected an arrow as the image to indicate a target service)

The following elements, however, remain as in the English SFX menu:

- the top header
- the language drop-down list
- the More Options link

### NOTE:

Hebrew support for the SFX menu is limited to the simplified menu template and is not provided for the advanced SFX menu template.

## Mobile SFX Menu

The SFX menu has been optimized for display on mobile devices. The mobile interface differs in several ways from the standard SFX menu:

- No image in the SFX menu banner. Institutional branding is done via separate header image for mobile SFX menu.
- The menu is divided into three sections, each accessible via a separate tab:
  - Main – a section with basic services (displayed by default when accessing the menu)
  - bX
  - More – additional services
- No separate simplified and advanced template sets. All configuration is done via **SFX Admin Center > Configuration > Menu design** via the configuration UI for the simplified template set.
- All textual information is defined via **SFXAdmin > Configuration > Translations & Display**.
- Verde license information icon is not displayed in the mobile SFX menu.

---

**NOTE:**

The mobile interface has been tested on the following devices:

Nexus 5, LG G3, LG G2, iPhone 4s, iPad 2, Galaxy Tab 2

---

## Overview

You access the SFX menu interface the same way as you would the standard interface – the mobile device is automatically detected. The configuration settings that are set for the simplified template No. 1 also apply to the mobile interface, although there are cases where the mobile interface differs from the standard SFX menu (For more information, see **Mobile SFX Menu Configuration** on page 479.)

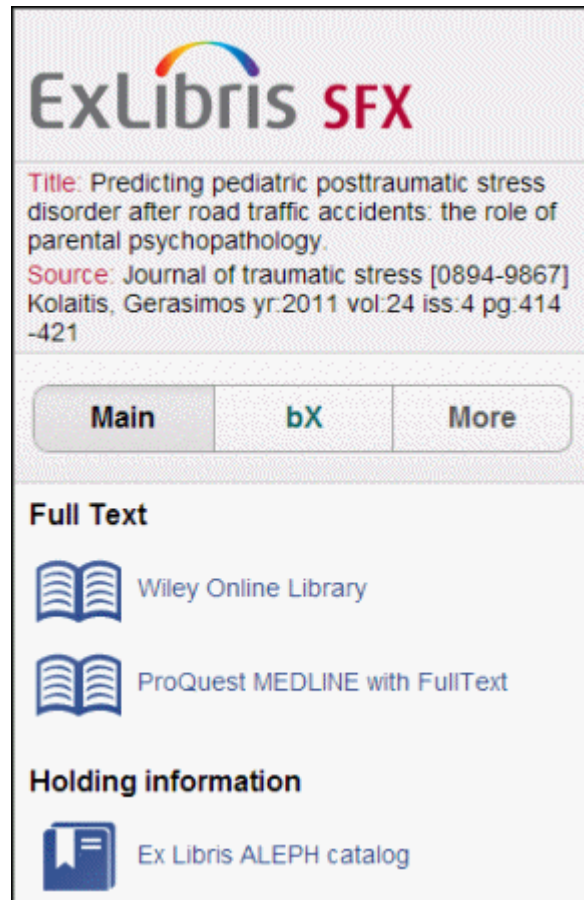


Figure 251: Mobile SFX Menu – Main Tab

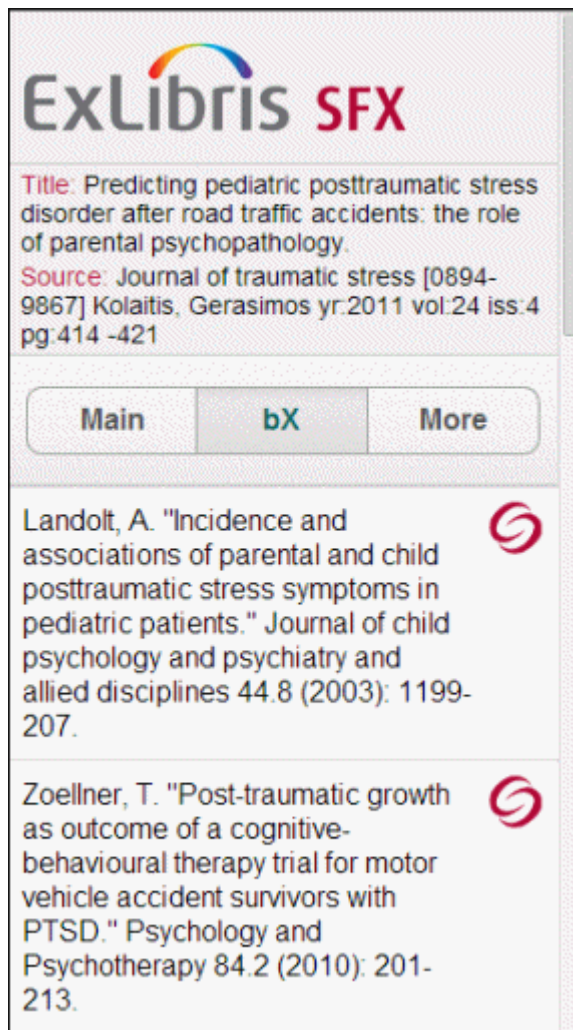


Figure 252: Mobile SFX Menu – bX Tab

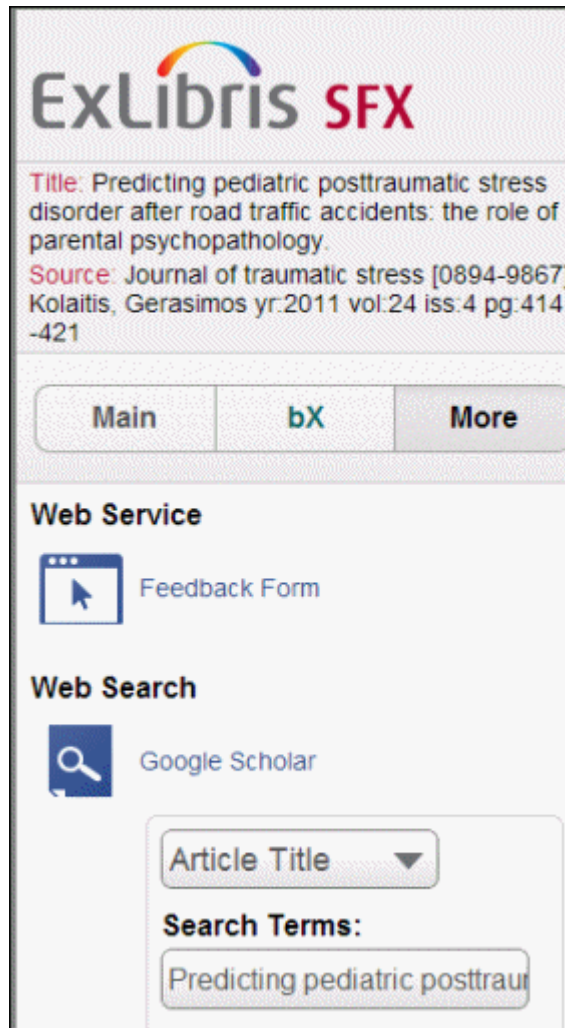


Figure 253: Mobile SFX Menu – More Tab

### **Mobile SFX Menu Configuration**

You can enable/disable the mobile SFX menu for all sources or enable the mobile SFX menu for all sources except for Primo. For more information, see [Enabling/Disabling the Mobile SFX Menu View](#) on page 429.

All configuration is done via **SFXAdmin Center > Configuration > Menu Configuration** via the configuration UI for the simplified template set. If the active template is set to the advanced template you have to configure it to the simplified template:

### To configure the SFX mobile menu to the simplified template:

- 1 Select **Simplified Template No. 1** from list. The Menu Design sections now become accessible.
- 2 Make configuration changes via the sections on the left side of this screen and click **Save**.

Most configuration settings that are set for the standard interface also apply to the mobile interface, except that for the mobile SFX menu you change or define the header image in **SFXAdmin > Configuration > Menu Configuration**.

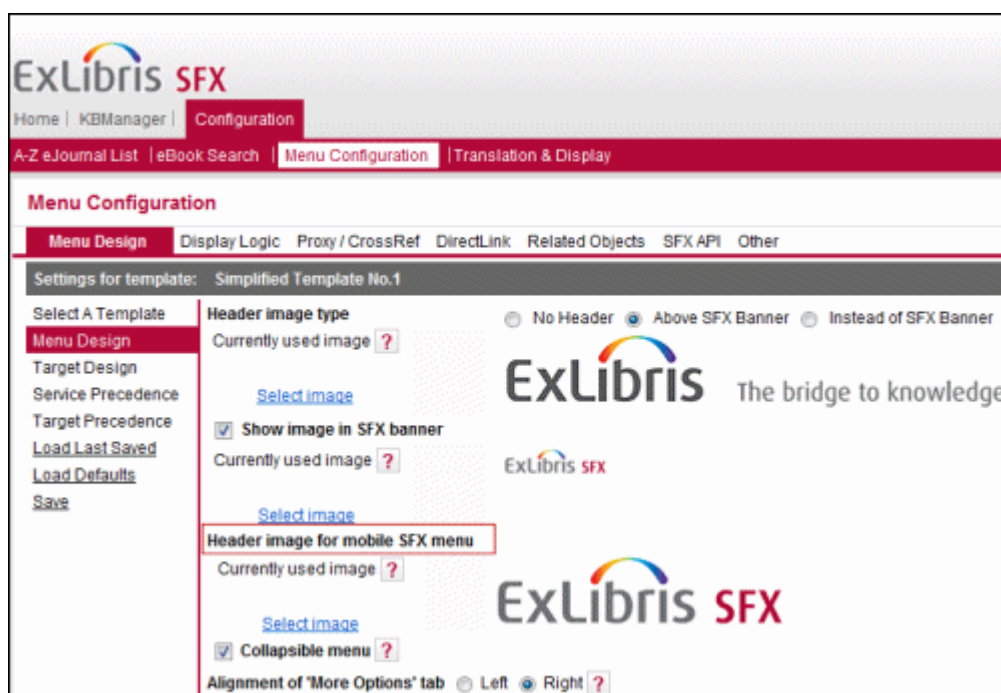


Figure 254: Mobile SFX Menu Header

The following configuration settings are fixed for the mobile SFX menu and are not configurable via the Target Design tab in the Menu Configuration section of the SFXAdmin:

- **Text to Hyperlink** is set to Target Name.
- **Show fill-in boxes** is set to No.
- **Show Go button** is set to No.
- **Target icon** – configured to be a fixed set of target icons specific to the mobile SFX menu.



### **Configuration for the bX Section of the SFX Menu**

bX configuration is done via `config/bx.config` (like in the regular SFX menu), except for the following:

- The `show_full_text_button` is always 0 for mobile. A full text link is available via the article title or book title hyperlink and cannot be disabled.
- The location of the bX section cannot be configured – it is always a separate tab.
- No more than 10 results are displayed - even if the `bx.config` file settings are higher than 10.
- The result list cannot be collapsed or expanded.

Additionally, the following differences exist between the standard SFX menu and the mobile SFX menu:

- The bX logo is not shown in the mobile SFX menu.
- Selecting and saving bX citations is not supported in the mobile SFX menu.

### **Target Displayers in the SFX Mobile Menu**

For full text, Table of Contents, and abstract services, no fill-in boxes are used (for both the default displayers and displayers for specific targets).

For other services, the displayers are displayed (for example, Web searches).

## **Translations and Display**

This section of the SFX Admin Center allows you to determine the exact wording for all text elements to be used in your SFX A-Z List, for one or multiple languages in which you want to make the A-Z List available to end users.

This tool allows you to:

- Change the wording of all text elements in the language of your choice.
- Return to the default settings for languages provided by Ex Libris.
- Add or remove a language.
- Run the SFX Admin mapping wizard to import existing configurations.

The first time you access the tool, the SFX Admin mapping wizard appears. The wizard helps you import your existing SFX menu language settings, defined in the following files of your SFX instance, for use in the SFX A-Z List:

- `config/map_languages.config_`
- `config/services_public_name.config_`

This ensures that languages used in the SFX menu are imported to the A-Z configuration section.

Click the **Translation and Display** tab. The following is displayed:

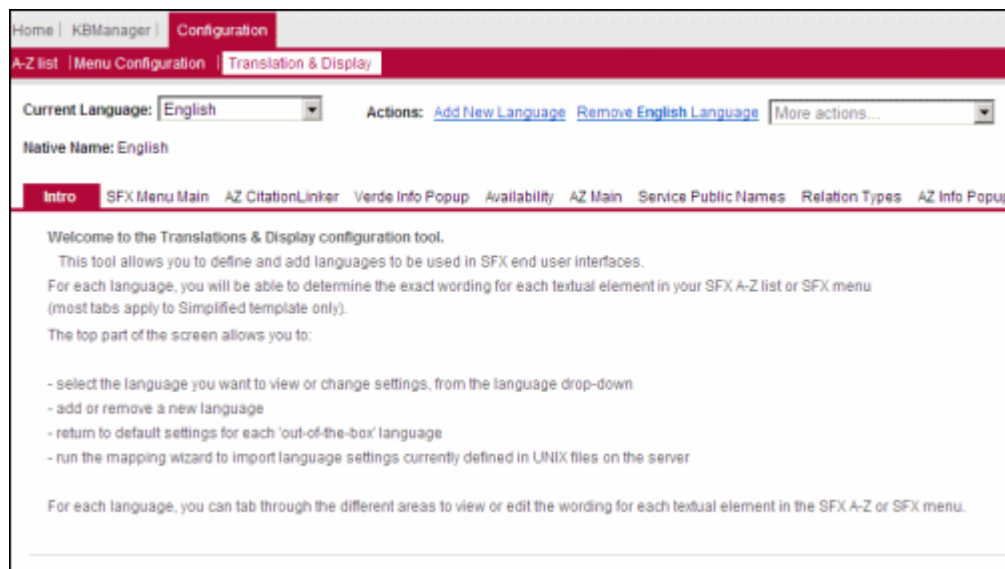


Figure 255: Translations & Display

The top part of the window displays the following options:

- **Current Language** – From the **Current Language** drop-down list, select the language you want to view or for which you want to change settings
- **Add New Language** – Click to add a language.
- **Remove Language** – Click to remove a language.
- **More Actions** – Select to perform additional actions, such as running the mapping wizard and editing the native language name.

For each language, several tabs are available, grouping similar text elements. Click a tab to view or edit the wording for each text element in the SFX A-Z List. For example:

Message Text	Description	Message Code
Absorbed by	ABSORBED_BY Relation Type	ABSORBED_BY
Absorbed	ABSORBED RelationType	ABSORBED
Absorbed in part by	ABSORBED_IN_PART_BY Relation Type	ABSORBED_IN_PART_BY
Series	SERIES RelationType	SERIES
Part of series	SERIES_ITEM Relation Type	SERIES_ITEM
Absorbed in part by	ABSORBED_IN_PART Relation Type	ABSORBED_IN_PART
Continued by	CONTINUED_BY Relation Type	CONTINUED_BY
Continued in part by	CONTINUED_IN_PART_BY Relation Type	CONTINUED_IN_PART_BY
Continues	CONTINUES Relation Type	CONTINUES
Continues in part	CONTINUES_IN_PART Relation Type	CONTINUES_IN_PART
Formed by the union of	FORMED_BY_THE_UNION_OF Relation Type	FORMED_BY_THE_UNION_OF
Merged into	MERGED_INTO Relation Type	MERGED_INTO
Other edition	OTHER_EDITION Relation Type	OTHER_EDITION
Other book edition	OTHER_BOOK_EDITION Relation Type	OTHER_BOOK_EDITION
Part of proceeding series	PROCEEDING_SERIES Relation Type	PROCEEDING_SERIES
Proceeding	PROCEEDING_ITEM Relation Type	PROCEEDING_ITEM

Figure 256: Relation Types

**NOTE:**

Currently, only the Relation Types text elements translated using the Translations and Display tool are used in the SFX menu.

Each tab presents a list of text elements. For each text element, the following is displayed:

- **Message text** – The text as it is displayed in the A-Z List. When a new language is created, the message text is in English. The translation can be entered using the **Edit** button .
- **Description** – A description of the message and its use in the A-Z List.
- **Message code** – A code used in the HTML template as a placeholder for the actual text.

Click the **Edit** button to change the message text wording. The following dialog box opens:

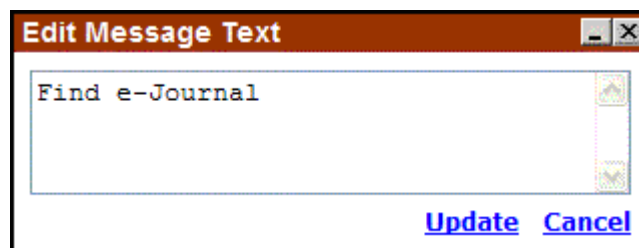


Figure 257: Edit Message Text

Change the text and click **Update** to save your changes or click **Cancel** to close the dialog box without saving your changes. Saved changes are displayed in the A-Z List immediately. No restarting of services or re-indexing of the A-Z List is required.

The following tabs are available:

- **MultiObjects Menu** – Contains the translations of the multiObject menu.
- **SFX Main Menu** – Contains all textual elements for the display of the SFX menu banner and the textual elements used by the different target displayers distributed as part of the SFX software.
- **AZ CitationLinker** – Contains all textual elements for the display of the AZ CitationLinker.
- **Verde Info Popup** – Contains all textual elements for the Verde license information dialog box. More information on this option can be found in the Verde user documentation.
- **Availability** – Contains all textual elements for the display of coverage and embargo information in the SFX menu. This coverage information is displayed when the option **Show Availability** is turned on for a particular source. More information on this option can be found in the **Using a Special Displayer to Show Date Threshold Information** section of the *SFX Advanced User's Guide*. This also affects the display in the A-Z List and DirectLink sidebar.
- **AZ Main** – Contains all textual elements for the display of the main A-Z List
- **Service Public Names** – Contains the text describing each type of service—for example, **Full-text available via**. This text is used as the default explanatory text for each service in the SFX menu. This also affects the display of the A-Z List.

---

**NOTE:**

It is possible to change the default explanatory text for one particular target service using the KBManager. To do this, click **Edit** next to the target service and enter the required text in the **Public Name** field. This

text overrides the default explanatory text defined in the Services Public Names tab for this target service.

---

- **Relation Types** – Contains all textual elements for the display of related object services in the SFX menu. More information on related objects in the SFX menu can be found in **Related Objects** on page 464. This also affects the display of the A-Z List.
- **AZ Info Popup** – Contains all textual elements for the display of the A-Z Info dialog box.

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**NOTE:**

The only element that cannot be translated or defined in the Translations & Display section of the SFX Admin Center is the target public name. This is defined in the KBManager Target window and cannot currently be translated.

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# 9

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## Update Reports

This section includes:

- **Overview** on page 487
- **Text Reports** on page 487
- **HTML Reports** on page 503

### Overview

This section describes the reports that are generated as a result of the KB update procedure. Global report information is included as part of the KnowledgeBase database package. Local report information (updated and deleted local database items, localizations, and other activation information per instance) is added to these global reports during the revision update process.

All report data is stored in the `REPORT` tables in the global and local instances, and from these tables, SFX makes available two report formats: text (`.txt`) and HTML (`.htm`).

### Text Reports

The text reports contain detailed information about each database item that is new, updated, or deleted in an SFX database during the update procedure. The text reports are produced in a tab-delimited format. The tab-delimited files can be read using a text editor or can be opened in Microsoft Excel.

For each table in the SFX database, you can produce a report containing information about one of the following:

- New items
- Updated items
- Deleted items

This information is specific to the revision update and the SFX instance in which the update is run. Report contents vary, depending on the amount of customization that took place in the SFX instance.

## Viewing Text Reports

To view KB update reports in `.txt` format, from the KBUUpdate section of the Setup and Administration area, click **Text Reports**. The following window opens:

ExLibris SFX  
OpenURL Generator | Log Off  
Home | KBManager | KBUUpdate  
Text Report | HTML Report  
Revision Reports - Text  
Select Revision: 20113300 Started At: 20110817120840  
Type of change: New  
Filter to active/localized only?: No  
Reports Grouped per Table  
 Targets  Target Services  Object Portfolios  
 Objects  Sources  Source Services  
 Relations  Publishers  Linking Parameters  
 Categories  Subcategories  Cat/Subcat combinations  
 Category assignments  Authors  Object Identifiers  
 Titles  
 Local Titles  Local Object Identifiers  
Submit

Figure 258: Text Report



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**NOTE:**

If there is a lot of report data in the SFX database (more than twelve KBDB revisions), the following warning is displayed in the Revision Reports window:

Report tables contain more than twelve KBDB revisions. This may cause slowness when showing the reports. To remove old report data, use the "ServerAdminUtility > Revision Update" section.

---

**To view a text report:**

- 1 From this window, select the various filters to determine the content of the report. The filters must be selected in the following order:
  - **Select Revision** – Select the revision for which you want to see a report.
  - **Started At** – Select the date and time that the revision was started.
  - **Type of Change** – Select the type of change to be included in the report:
    - New
    - Updated
    - Deleted
  - **Filter to active/localized only?** – Select **Yes** to filter the report to contain only items that are active, localized, or local.
  - **Reports Grouped per Table** – Select the types of items to be included in the report. If an item is greyed-out, it means that there are no records for that item.
- 2 Click **Submit**.

The report is produced as a .txt file. You can either save it or open it with a text editor.

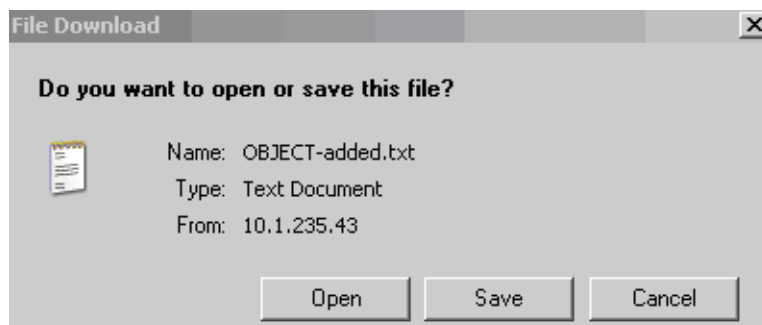


Figure 259: Open or Save File

## Opening Text Files in Excel

When you select to produce a report in .txt format, it is recommended to save the file and open it in Microsoft Excel.

### To open the .txt files in Excel:

- 1 Start Excel and select **File > Open** to open your file.
- 2 Navigate to the directory containing the report. If you cannot see the file, select **All files** as the file type.

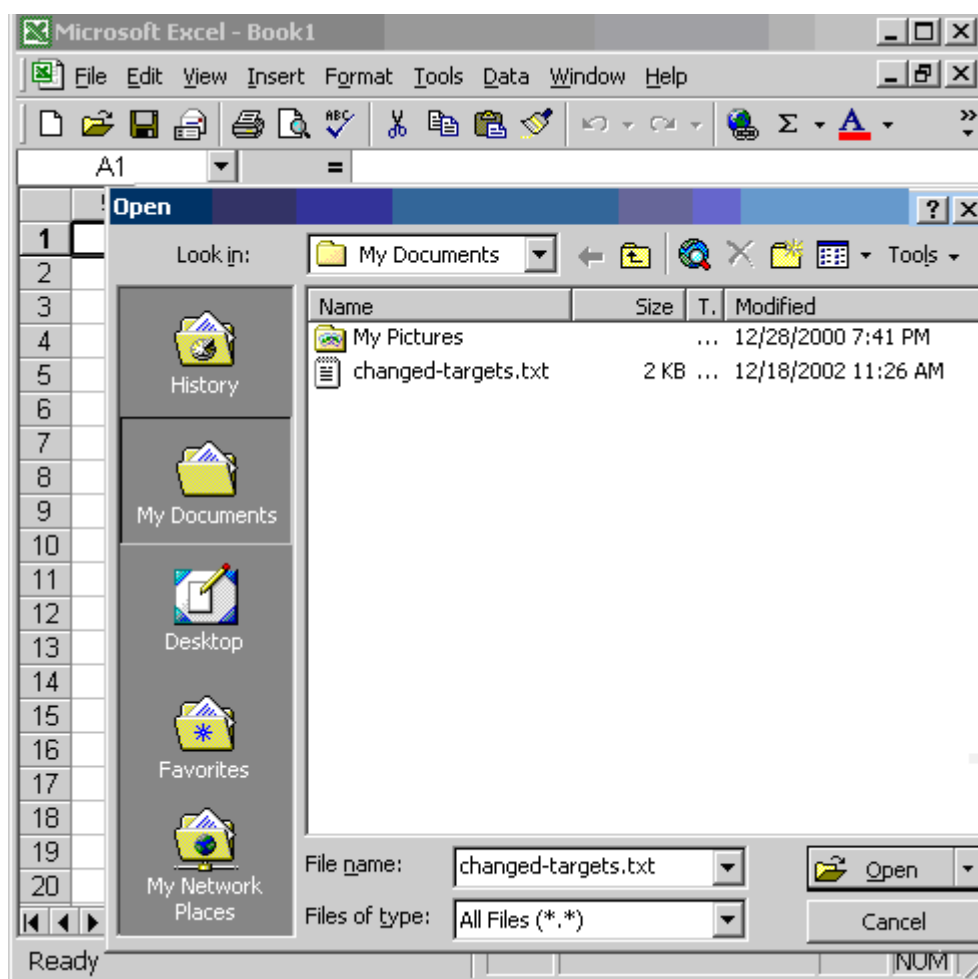


Figure 260: Open File

- 3 Select the .txt file. The Text Import Wizard opens.

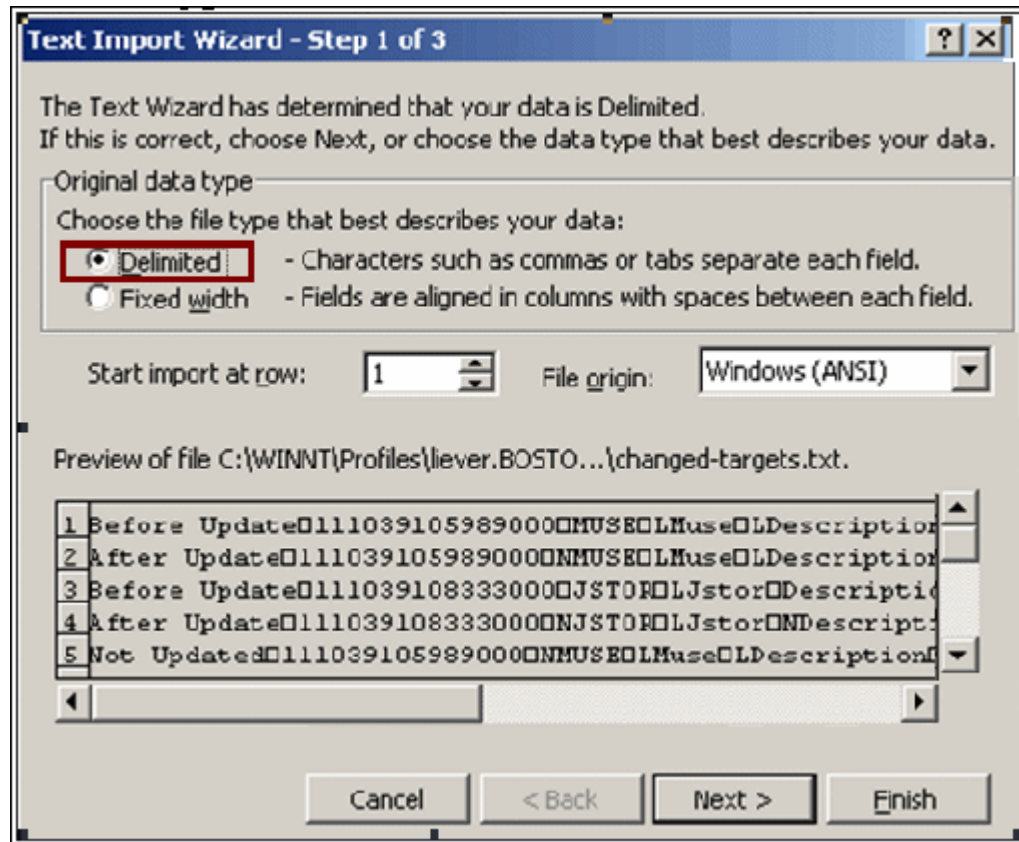


Figure 261: File Type Delimited

- 4 Select the **Delimited** file type and click **Next**.

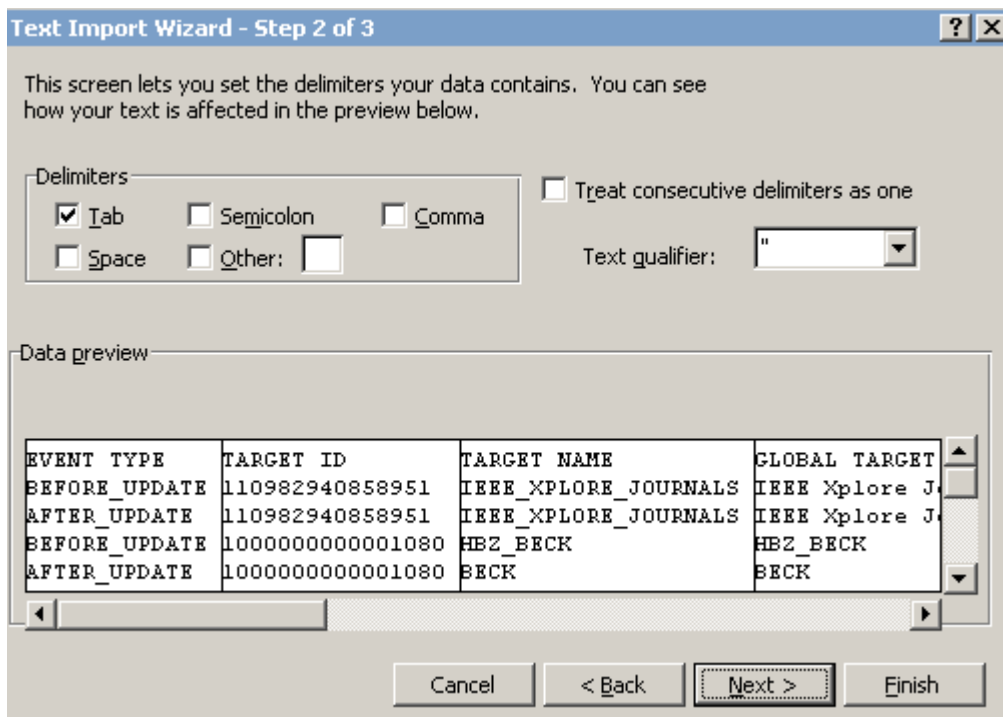


Figure 262: Delimiter: Tab

- 5 Select **Tab** as the delimiter. Click **Next**.

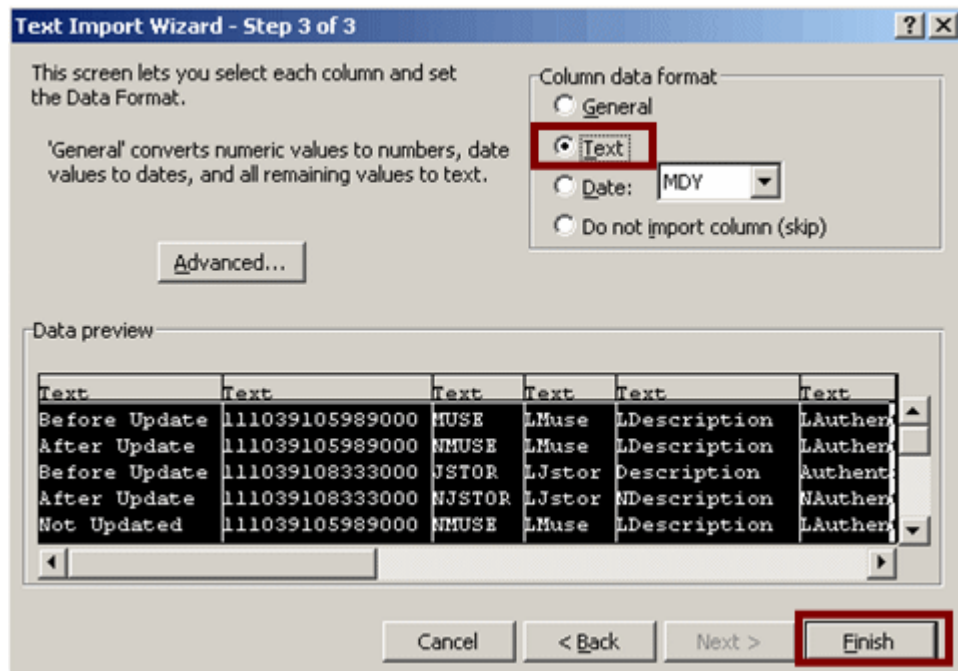


Figure 263: Text Format

- 6 Select all columns in the Wizard (you can use CTRL+SHIFT to select all columns).
- 7 Select **text**.
- 8 Click **Finish**.

## Format of the Text Reports

The name of each file indicates the type of change being reported (New, Deleted, and Updated) and the name of the table to which the report pertains.

For each table, the fields listed below are included in the files.

Note that the **Event Type** can be:

- New
- Deleted
- Before Update
- After Update

## Reading New Reports

Table 49. Text Report Fields

Report Item	Fields
<b>Targets</b>	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ TARGET ID</li> <li>■ TARGET NAME</li> <li>■ GLOBAL TARGET PUBLIC NAME</li> <li>■ INTERFACE ID</li> <li>■ TARGET CHARACTER SET</li> <li>■ DESCRIPTION</li> <li>■ GLOBAL THRESHOLD</li> <li>■ AGGREGATOR</li> <li>■ ACTIVATION STATUS</li> <li>■ LOCAL TARGET PUBLIC NAME</li> <li>■ LOCAL THRESHOLD</li> <li>■ LOCAL? – (value is Y if the item is locally created and N if it is global.)</li> </ul>
<b>Target Services</b>	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ TARGET SERVICE ID</li> <li>■ TARGET NAME</li> <li>■ SERVICE TYPE</li> <li>■ DESCRIPTION</li> <li>■ GLOBAL TARGET PARSER PROGRAM</li> <li>■ GLOBAL PARSE PARAM</li> <li>■ GLOBAL TARGET DISPLAYER PROGRAM</li> <li>■ GLOBAL OBJECT LOOKUP</li> <li>■ LINKING LEVEL</li> <li>■ FREE</li> <li>■ CROSSREF SUPPORTED</li> <li>■ GLOBAL THRESHOLD</li> <li>■ AUTOLOADER USED</li> <li>■ LOGIC UPDATE DATE</li> <li>■ STATUS</li> <li>■ ACTIVATION STATUS</li> </ul>

Table 49. Text Report Fields

Report Item	Fields
<b>Target Services</b>	<ul style="list-style-type: none"> <li>■ AUTO ACTIVE</li> <li>■ SERVICE PUBLIC DESCRIPTION</li> <li>■ LOCAL TARGET PARSER PROGRAM</li> <li>■ LOCAL PARSE PARAM</li> <li>■ LOCAL TARGET DISPLAYER PROGRAM</li> <li>■ LOCAL OBJECT LOOKUP</li> <li>■ LOCAL CROSSREF ENABLED</li> <li>■ LOCAL THRESHOLD</li> <li>■ LOCAL? – (value is Y if the item is locally created and N if it is global.)</li> </ul>
<b>Object Portfolios</b>	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ OP ID</li> <li>■ TARGET NAME</li> <li>■ SERVICE TYPE</li> <li>■ OBJECT ID</li> <li>■ GLOBAL TARGET PARSER PROGRAM</li> <li>■ GLOBAL PARSE PARAM</li> <li>■ DESCRIPTION</li> <li>■ LINKING LEVEL</li> <li>■ GLOBAL THRESHOLD</li> <li>■ VALUE</li> <li>■ TITLE VALUE</li> <li>■ ACTIVATION STATUS</li> <li>■ LOCAL TARGET PARSER PROGRAM</li> <li>■ LOCAL PARSE PARAM</li> <li>■ LOCAL THRESHOLD</li> <li>■ USE PROXY</li> <li>■ LOCAL? – (value is Y if the item is locally created and N if it is global.)</li> </ul>

Table 49. Text Report Fields

Report Item	Fields
<b>Objects</b>	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ OBJECT ID</li> <li>■ OBJECT TYPE</li> <li>■ LANGUAGE</li> <li>■ PEER REVIEWED</li> <li>■ TITLE VALUE</li> <li>■ TITLE VALUE</li> <li>■ STATUS</li> <li>■ LOCAL? – (value is Y if the item is locally created and N if it is global.)</li> </ul>
<b>Sources</b>	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ SOURCE ID</li> <li>■ SOURCE NAME</li> <li>■ SOURCE PARSER PROGRAM</li> <li>■ SHOW AVAILABILITY</li> <li>■ DESCRIPTION</li> </ul>
<b>Source Services</b>	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ SOURCE SERVICE ID</li> <li>■ SOURCE ID</li> <li>■ SERVICE TYPE</li> <li>■ SHOW AVAILABILITY</li> </ul>
<b>Relations</b>	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ RELATION ID</li> <li>■ PRIMARY OBJECT ID</li> <li>■ SECONDARY OBJECT ID</li> <li>■ RELATION TYPE</li> </ul>



Table 49. Text Report Fields

Report Item	Fields
<b>Publishers</b>	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ PUBLISHER NAME DISPLAY</li> <li>■ PUBLISHER NAME NORMALIZED</li> <li>■ DATE OF PUBLICATION</li> <li>■ PLACE OF PUBLICATION DISPLAY</li> <li>■ PLACE OF PUBLICATION NORMALIZED</li> <li>■ OBJECT ID</li> <li>■ TITLE VALUE</li> </ul>
<b>Linking Parameters</b>	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ LINKING PARAM ID</li> <li>■ ITEM TYPE</li> <li>■ ITEM ID</li> <li>■ TARGET NAME</li> <li>■ SERVICE TYPE</li> <li>■ PARAMETER NAME</li> <li>■ DESCRIPTION</li> <li>■ IS OTB VALUE</li> <li>■ VALUE</li> </ul>

Table 49. Text Report Fields

Report Item	Fields
<b>Authors</b>	<ul style="list-style-type: none"> <li>■ EVENT</li> <li>■ AUTHOR_ID</li> <li>■ AUTHOR_SIGNIFICANCE</li> <li>■ AUTHOR_TYPE</li> <li>■ AUTHOR_FIRST_NAME</li> <li>■ AUTHOR_LAST_NAME</li> <li>■ AUTHOR_FULL_NAME</li> <li>■ AUTHOR_FIRST_NAME_NORMALIZED</li> <li>■ AUTHOR_LAST_NAME_NORMALIZED</li> <li>■ AUTHOR_FULL_NAME_NORMALIZED</li> <li>■ FULL_NAME_FORMAT</li> <li>■ COMMENT</li> <li>■ OBJECT_ID</li> <li>■ ID</li> <li>■ TITLE</li> </ul>
<b>Categories</b>	<ul style="list-style-type: none"> <li>■ EVENT</li> <li>■ CAT ID</li> <li>■ CAT NORMALIZED</li> <li>■ CAT DISPLAY</li> </ul>
<b>Cat/Subcat Combinations</b>	<ul style="list-style-type: none"> <li>■ EVENT</li> <li>■ INTERNAL ID</li> <li>■ CAT ID</li> <li>■ CAT NORMALIZED</li> <li>■ SUBCAT ID</li> <li>■ SUBCAT NORMALIZED</li> </ul>
<b>Subcategories</b>	<ul style="list-style-type: none"> <li>■ EVENT</li> <li>■ SUBCAT ID</li> <li>■ SUBCAT NORMALIZED</li> <li>■ SUBCAT DISPLAY</li> </ul>

Table 49. Text Report Fields

Report Item	Fields
Category Assignments	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ CAT ASSIGN INTERNAL ID</li> <li>■ CAT SUBCAT INTERNAL ID</li> <li>■ CAT NORMALIZED</li> <li>■ SUBCAT NORMALIZED</li> <li>■ OBJECT ID</li> <li>■ VALUE</li> <li>■ TITLE VALUE</li> </ul>
Object Identifiers	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ OBJECT IDENTIFIER ID</li> <li>■ OBJECT ID</li> <li>■ TYPE</li> <li>■ SUB TYPE</li> <li>■ STATUS</li> </ul>
Titles	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ TITLE ID</li> <li>■ OBJECT ID</li> <li>■ TITLE TYPE</li> <li>■ TITLE SUB TYPE</li> <li>■ TITLE VALUE</li> <li>■ NON FILING CHAR</li> <li>■ TITLE LANGUAGE</li> <li>■ STATUS</li> </ul>

Table 49. Text Report Fields

Report Item	Fields
<b>Local Titles</b>	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ TITLE ID</li> <li>■ OBJECT ID</li> <li>■ TITLE TYPE</li> <li>■ TITLE SUB TYPE</li> <li>■ TITLE VALUE</li> <li>■ NON FILING CHAR</li> <li>■ TITLE LANGUAGE</li> <li>■ STATUS</li> </ul>
<b>Local Identifiers</b>	<ul style="list-style-type: none"> <li>■ EVENT TYPE</li> <li>■ OBJECT IDENTIFIER ID</li> <li>■ OBJECT ID</li> <li>■ TYPE</li> <li>■ SUB TYPE</li> <li>■ STATUS</li> </ul>

The New reports contain detailed information about each item that was added to your SFX during the revision update.

The following is an example of a report of new objects:

	A	B	C	D	E	F	G	H
1	EVENT TYPE	OBJECT ID	OBJECT TYPE	LANGUAGE	PEER REVIEWED	TITLE VALUE	TITLE VALUE	STATUS
2	NEW	2.32E+15	JOURNAL	eng	NO	Journal of management history	Journal of management history	ACTIVE
3	NEW	2.32E+15	JOURNAL	eng	NO	South African tax cases	South African tax cases	ACTIVE
4	NEW	2.32E+15	JOURNAL	eng	NO	OBJECT has no Main Title	OBJECT has no Main Title	ACTIVE
5	NEW	2.32E+15	JOURNAL	eng	NO	Farm labor	Farm labor	ACTIVE
6	NEW	2.32E+15	JOURNAL	eng	NO	Vegetables	Vegetables	ACTIVE
7	NEW	2.32E+15	JOURNAL	eng	NO	Vegetables	Vegetables	ACTIVE
8	NEW	2.32E+15	JOURNAL	ita	NO	Nuovo bullettino di archeologia cristiana	Nuovo bullettino di archeologia cristiana	ACTIVE

Figure 264: Objects

The following is an example of a report of new target services:

	A	B	C	D	E	F	G	H	I
1	EVENT TYPE	TARGET SERVICE ID	TARGET NAME	SERVICE TYPE	DESCRIPTION	GLOBAL TARGET PARSER PROGRAM	GLOBAL PARSE PARAM	GLOBAL TARGET DISPLAYER PROGRAM	GLOBAL OBJECT LOOKUP
2	NEW	2.38E+15	KARGER_BOOKS_SERIES	getCitedRecord					Y
3	NEW	2.42E+15	HIGHWIRE_PRESS_HARBORSIDE_PRESS	getFullTtxt		Highwire:HIGHWIRE			Y
4	NEW	2.42E+15	HIGHWIRE_PRESS_QUADRANT_HEALTHCOM_INC	getFullTtxt		Highwire:HIGHWIRE			Y
5	NEW	2.42E+15	HIGHWIRE_PRESS_PARENTERAL_DRUG_ASSOCIATION_INC_PDA	getFullTtxt		Highwire:HIGHWIRE			Y
6	NEW	2.42E+15	WILEY_INTERSCIENCE_ONPT_IN_TITLES_2010	getFullTtxt		Wiley:WILEY	url=http://www.w3.interscience.wiley.com		Y
7	NEW	2.42E+15	WILEY_INTERSCIENCE_ONPEN_ACCESS_FREE_2010	getFullTtxt		Wiley:WILEY	url=http://www.w3.interscience.wiley.com		Y
8	NEW	2.42E+15	METAPRESS_LIVERPOOL_UNIVERSITY_PRESS	getFullTtxt		METAPRESS::METAPRESS	url=http://www.metapress.com		Y

Figure 265: Target Service File

## Reading Updated Reports

The updated reports contain detailed information about each item in your SFX instance in which a change was made during the revision update.

	A	B	C	D	E	F	G	H	I	J
1	EVENT TYPE	TARGET SERVICE ID	TARGET NAME	SERVICE TYPE	DESCRIPTION	GLOBAL TARGET PARSER PROGRAM	GLOBAL PARSE PARAM	GLOBAL TARGET DISPLAYER PROGRAM	GLOBAL OBJECT LOOKUP	GLOBAL LINKING LEVEL
2	BEFORE_UPDATE	1.1097E+14	WILEY_INTERSCIENCE_JOURNALS	getFullTxt		Wiley:WILEY	url1=http://www3.interscience.wiley.com		Y	JOURNAL
3	AFTER_UPDATE	1.1097E+14	WILEY_INTERSCIENCE_JOURNALS	getFullTxt		Wiley:WILEY	url1=http://www3.interscience.wiley.com		Y	JOURNAL
4	BEFORE_UPDATE	1.1097E+14	HIGHWIRE_PRES_S_JOURNALS	getFullTxt		Highwire:HIGWIRE			Y	ARTICLE
5	AFTER_UPDATE	1.1097E+14	HIGHWIRE_PRES_S_JOURNALS	getFullTxt		Highwire:HIGWIRE			Y	ARTICLE
6	BEFORE_UPDATE	1.1097E+14	HIGHWIRE_PRES_S_JOURNALS	getTOC		Highwire:HIGWIRE			Y	ARTICLE
7	AFTER_UPDATE	1.1097E+14	HIGHWIRE_PRES_S_JOURNALS	getTOC		Highwire:HIGWIRE			Y	ARTICLE

Figure 266: Updated Reports

For each item, you can view the state of the item before and after the update.

## Reading Deleted Reports

The Deleted reports contain detailed information about those items that were deleted during the revision update.

	A	B	C	D	E	F	G	H
1	EVENT TYPE	OBJECT ID	OBJECT TYPE	LANGUAGE	PEER REVIEWED	TITLE VALUE	TITLE VALUE	STATUS
2	DELETED	9.55E+11	JOURNAL	eng	YES	Learning & memory	Learning & memory	WITHDRAWN
3	DELETED	1.11E+14	JOURNAL	eng	NO	ISRAEL	ISRAEL	WITHDRAWN
4	DELETED	1.11E+14	JOURNAL	eng	NO	FLOWER AND FEATHER	FLOWER AND FEATHER	WITHDRAWN
5	DELETED	1.11E+14	JOURNAL	eng	NO	Moscow University chemistry bulletin	Moscow University chemistry bulletin	WITHDRAWN
6	DELETED	9.91E+14	JOURNAL	eng	NO	Water	Water	WITHDRAWN
7	DELETED	9.91E+14	JOURNAL	eng	NO	Tetsugaku, kagakushi ronsō	Tetsugaku, kagakushi ronsō	WITHDRAWN
8	DELETED	9.91E+14	JOURNAL	eng	NO	Sun	Sun	WITHDRAWN
9	DELETED	1E+15	BOOK	eng	NO	Lenin	Lenin	WITHDRAWN
10	DELETED	1E+15	JOURNAL	eng	NO	Water	Water	WITHDRAWN

Figure 267: Deleted Reports

## HTML Reports

The HTML reports offer the option to view all the changes, deletions, or new items that are part of a specific revision update. You can also choose to view only items that are active, local, or localized in the instance. To do this, select **Yes** from the **Filter to active/localized only** drop-down list.

If you select **Yes**, the HTML reports are limited to:

- New active items (for portfolios in which the AutoActive option is in use)
- Active items that were updated or deleted
- Updated or deleted local items
- Updated or deleted localized global items

---

**NOTE:**

Unlike text reports, HTML reports do not show objects or object-related tables.

---

## Viewing HTML Reports

To view KB update reports in HTML format, from the KBUUpdate section of the Setup and Administration area, click **HTML Reports**. The following window opens:



The screenshot shows the ExLibris SFX interface for generating HTML reports. The top navigation bar includes 'Home | KBManager | KBUUpdate' and 'OpenURL Generator | Log Off'. Below this, there are tabs for 'Text Report' and 'HTML Report'. The main section is titled 'Revision Reports' and contains several form fields: 'Select Revision:' with a dropdown menu showing '20100305', 'Started At:' with a dropdown menu showing '20100302164236', 'Type of change' with a dropdown menu showing 'New', and 'Filter to active/localized only?' with a dropdown menu showing 'Yes'. Below these are three radio button options: 'Targets, Target Services, Sources, Source Services', 'Linking Parameters', and 'Object Portfolios select target service'. At the bottom, there is a 'Select output type' dropdown menu showing 'Screen', and two buttons: '< Back' and 'Submit'.

Figure 268: HTML Reports

### To view an HTML report:

- 1 Select the various filters to determine the content of the report:
  - **Select Revision** – Select the revision for which you want to see a report.
  - **Started At** – Select the date on which the revision was started.
  - **Type of Change** – Select the type of change to be included in the report:
    - New
    - Updated
    - Deleted



- **Filter to active/localized only?** – Select **Yes** or **No** from the drop-down list to view only items that are active, local, or localized in the instance.
  - Select the type of information you want included in the reports:
    - Targets, target services, sources, source services
    - Linking parameters
    - Object portfolios – Select object portfolios from the drop-down list. Press and hold the CTRL key to select multiple object portfolios.
  - **Select output type** – Select the format in which you want to receive the report:
    - Screen
    - E-mail
- 2 Click **Submit**.

If you selected **Yes** from the **Filter to active/localized only?** drop-down list, a table is displayed showing several subsets with which to refine your results.

For example:

The screenshot shows the ExLibris SFX interface for generating HTML reports. The page title is "Revision Reports". The user has selected revision "20100305" and started at "20100302164236". The "Type of change" is set to "Updated" and the filter is set to "Filter to active/localized only? Yes". The selected options are "Targets, Target Services, Sources, Source Services".

Refine result set	Target	Target Service	Source	Source Service
<a href="#">Updated active localized global record</a>	0	11	NA	NA
<a href="#">Updated localized global records</a>	0	15	0	NA
<a href="#">Updated active records</a>	1	11	NA	0
<a href="#">All updated records:</a>	1	15	0	0

The "Select output type" is set to "Screen". There are "< Back" and "Submit" buttons at the bottom.

Figure 269: HTML Reports with Result Subsets

- 3 Select one of the following options:
  - Updated active localized global record
  - Updated localized global records
  - Updated active records
  - All updated records

The following is an example of an HTML report:

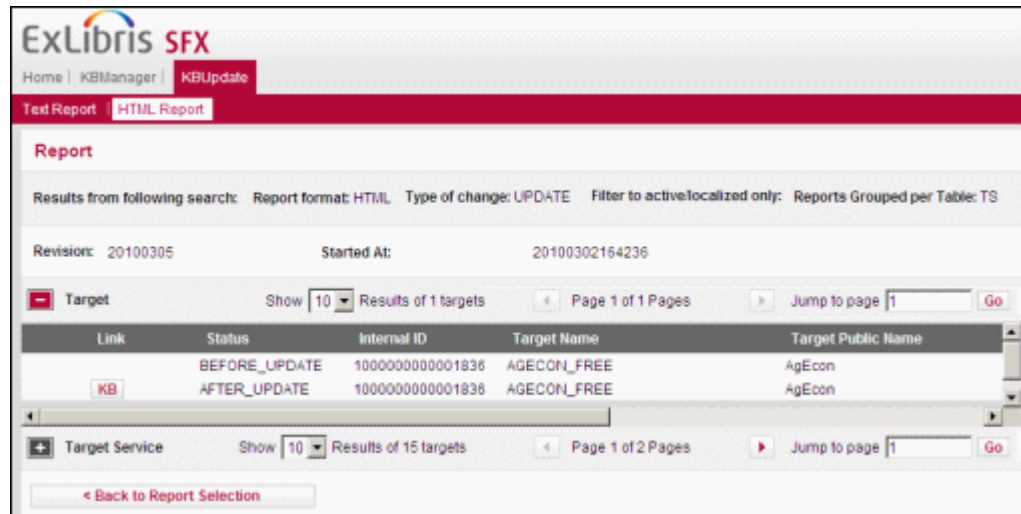


Figure 270: HTML Report Results

- 4 Click [KB](#) to open the item in KBManager. All the linking parameters of the target service are displayed.

## Reports Monitoring Tool

The Server Admin Utility (available via the UNIX file system for the instance) enables you to monitor and clean up the `REPORT` tables. For more information, refer to the **Revision Update** section of the *SFX System Administration Guide*.



# Part IV

---

## Additional Features

This part contains the following sections:

- **Section 10:** **CitationLinker and Fetch Item** on page 511
- **Section 11:** **Central Discovery Index** on page 517
- **Section 12:** **SFX KnowledgeBase Updates** on page 521



# 10

---

## CitationLinker and Fetch Item

---

**NOTE:**

For advanced information on the CitationLinker, refer to the *SFX Advanced User's Guide*.

---

The CitationLinker, a simplified version of the OpenURL Generator, is a tool designed for end users. It takes input specified by an end user, a reference librarian, or an interlibrary loan librarian, and creates an OpenURL that is sent to the SFX server.

As a result, users see an SFX menu created from their input, rather than an SFX menu created using an external source such as an abstracting and indexing database.

There are two versions of the CitationLinker – a new version called Fetch Item and the original CitationLinker.

JOURNAL SEARCH   CITATIONLINKER   FETCH ITEM   Language English

## Fetch item (CitationLinker)

Find a specific journal article, a journal or book by citation information.  
For best results, include a title, ISSN, ISBN, DOI or PMID.

Article    Journal    Book

Article Title   Journal Title   Contains

Year   Month   Day

Volume   Issue

Start Page   End Page

ISSN   DOI   PMID

Author Last Name   Author First Name   Author Initials

RESET   SEND

Figure 271: Fetch Item



ExLibris SFX

## CitationLinker

Article Journal Book

article title

journal  journal title

date

volume  issue

start page  end page

issn  DOI

pmid

author last name  first name  initials

Clear GO

Figure 272: CitationLinker

The CitationLinker is located at:

[http://server\\_name:port/instance\\_name/cgi/core/citation-linker.cgi](http://server_name:port/instance_name/cgi/core/citation-linker.cgi)

The Fetch Item is located at:

[http://server\\_name:port/instance\\_name/fetchitem](http://server_name:port/instance_name/fetchitem)

A drop-down list is displayed in Citation Linker that allows you to specify whether the search is for a result that starts with the text entered, an exact match of the text entered, or contains the text entered. Exact searches for CJK titles behave like a Starts With search for titles longer than 42 characters. This is because title search keys for CJK characters are limited to 255 characters (where each CJK character after normalization requires 6 characters).

For information concerning configuring Kanji variant title searching for SFX, see [Country and Language Settings](#) on page 420.

---

**NOTE:**

Click the [Cookie Policy](#) link at the bottom of CitationLinker to display a description of the SFX Privacy Policy and how Ex Libris uses cookies.

---

## Customizing CitationLinker

---

**NOTE:**

The following instructions are relevant for the original CitationLinker. For instructions on configuring the new Fetch Item utility, see **Configuring the Journal Search, A-Z List, and Fetch Item** on page 352.

---

The default appearance of the CitationLinker is pre-designed by Ex Libris. You can point to the CitationLinker as is, apply your own look and feel to the existing CitationLinker pages, or incorporate the CitationLinker forms into the pages that reside on your library's Web server.

The CitationLinker consists of:

- Five HTML template pages, one of which references a CSS file. These HTML pages are located at:

```
exlibris/sfx_ver/sfx4_1/<instance_name>/templates/  
citation
```

The CSS file is located at:

```
exlibris/sfx_ver/sfx4_1/<instance_name>/templates/css/  
public/style.css
```

---

**NOTE:**

The CSS file is also used by the SFX menu template files.

---

The following are the names of the HTML pages:

- Article.tpl
- Book.tpl
- Journal.tpl
- head.tpl
- tail.tpl
- Ex Libris-provided .gif files. These are located at:

```
exlibris/sfx_ver/sfx4_1/<instance_name>/templates/img/  
citation
```

- The `citation-linker.cgi` program. This is located at:

```
exlibris/sfx_ver/sfx4_1/<instance_name>/cgi/core
```

## CitationLinker for Mobile Devices

The CitationLinker has the same functionality when viewed on a mobile device.

The screenshot displays the mobile interface of CitationLinker. At the top, the 'CitationLinker' logo is on the left and the 'ExLibris SFX' logo is on the right. Below the logos are three tabs: 'Article', 'Journal', and 'Book'. The 'Article' tab is currently selected. The main form area includes a text input field for 'Article Title', another for 'Journal Title', and a 'Date' section with a text input field and three dropdown menus labeled 'Month', 'Day', and 'Year'. Under the 'Journal Title' field, there are three radio buttons: 'Begins with', 'Contains' (which is selected), and 'Exact Match'. At the bottom of the form, there is a prominent red 'Search' button and a 'Clear' link.

Figure 273: Mobile CitationLinker

### CitationLinker Images and Templates

Images for the CitationLinker mobile version (including the header image) can be localized at the following location:

`/exlibris/sfx_ver/sfx4_1/<instance>/templates/img/mobile/`

The following are the header image and template locations and file names:

- Citationlinker title image located on the left side of the screen:  
`/exlibris/sfx_ver/sfx4_1/<instance>/templates/img/mobile/  
logo_citation_linker.png`  
Recommended image size: 238 pixels width, 52 pixels height
- SFX logo image on the right side of the screen:  
`/exlibris/sfx_ver/sfx4_1/<instance>/templates/img/mobile/  
logo_sfx.png`  
Recommended image size: 213 pixels width, 52 pixels height
- Templates for the CitationLinker mobile version:  
`/exlibris/sfx_ver/sfx4_1/<instance>/templates/citation/mobile`

# 11

---

## Central Discovery Index

CDI is a central discovery index that supports both Summon and Primo and delivers enhanced discovery, streamlines library management, and provides operational efficiencies.

For more information about CDI, see [Documentation and Training](#).

The Central Discovery Index section allows you to specify the PC keys used to connect SFX with the Central Discover Index (CDI). This is needed to allow linking from SFX to your CDI institutional profile.

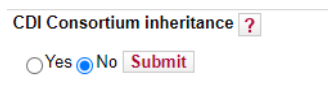
Additionally, this section provides access to:

- The CDI Consortia inheritance settings (for SFX instances with CDI and consortia API configuration set up).
- Configurations to define the priority order per provider that apply to all CDI **Quicklinks** and **Link in record** links.

### To change the CDI Consortia Inheritance:

For instances connected to a 'shared' instance (SFX consortium model 2), it is possible to define whether you want to inherit targets activated for CDI in the shared instance. The setting will be ignored if there is no 'shared' instance defined for your SFX instance.

- 1 From the SFX homepage, select **Central Discovery > Configuration**. The following appears:



The screenshot shows a form titled "CDI Consortium inheritance" with a question mark icon. Below the title are two radio buttons: "Yes" and "No". The "No" radio button is selected. To the right of the radio buttons is a red "Submit" button.

- 2 Select either 'Yes' or 'No' and select 'Save'. If 'Yes' is selected, all targets active in CDI for discovery in the shared instance will be inherited, and all search targets active in the shared instance will be inherited. If 'No' is selected, this inheritance of CDI related activations will not be inherited from the shared instance.

### To configure SFX to link to CDI and define CDI linking provider preferences:

- 1 From the SFX homepage, click **Discovery > Configuration**. The following appears:

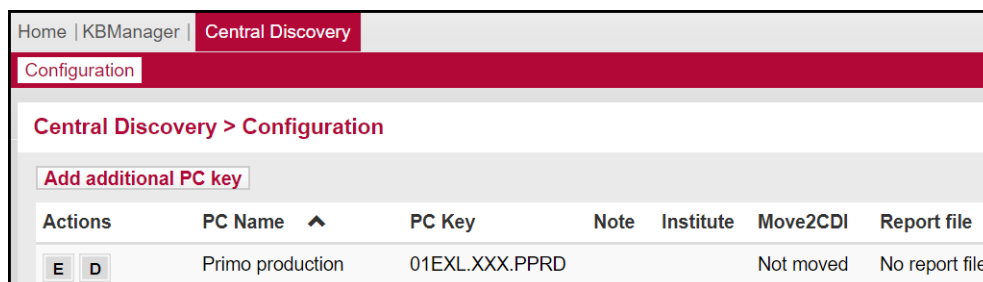


Figure 274: Central Discovery Configuration

- 2 Click **Add Additional PC Key**. The following appears:

Name\*

PC Key\*

CustomerID\*

Institute Name

Note:

You have 255 characters remaining

CDI linking provider preference

Available

- iScience
- 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

>> <<

\* Required field

Cancel Save

Figure 275: Add Central Discovery Configuration

- 3 Fill in the following required fields:
  - **Name** – choose a name for your CDI configuration
  - **PC Key and Customer ID** – provide the values for these fields from your Primo Back office > Institution Wizard configuration
- 4 In the CDI linking provider preference section, additional configuration can be provided. You can define which providers should be given preference

when displaying links from CDI in the Primo View It section. These preferences are used in the following situations:

- When only a single Link in Record link is returned from CDI
- When the Display All Links from CDI option is enabled and multiple links are returned from CDI.
- For Quicklink links

This configuration is passed to CDI and is used when returning search results from CDI. For more information regarding link priority, see [CDI and Linking to Electronic Full Text](#).

- 5 To add providers to the preference list:
  - a Select a new provider from the **Available** box. This box includes all CDI providers that have **Provider Coverage** set to **Yes** in the CDI Collection List.
  - b Use the left/right Arrows to move providers from the **Available** box to the **Chosen providers order** box and the opposite.
  - c Select the up/down arrows in the **Chosen providers order** box to adjust the new provider's precedence.

---

**NOTE:**

Providers not included in the **Chosen providers order** box are listed below the ones you selected.

---

- 6 Click **Save**.

After adding a PC key and Customer ID (and optionally defining provider preferences for CDI linking), you can use the Central Discovery configuration list to edit or delete existing PC keys.





# 12

---

## SFX KnowledgeBase Updates

This section includes:

- **Overview** on page 521
- **Applying an SFX KnowledgeBase Update** on page 523
- **Software Update** on page 529
- **Database Update** on page 530

---

### NOTE:

For advanced information on SFX KnowledgeBase updates, refer to the *SFX Advanced User's Guide*.

---

## Overview

At regular intervals, Ex Libris provides SFX KnowledgeBase packages containing the following:

- Software updates – new and updated configuration files, source parsers, target parsers, and so forth.
- Database updates – new and updated targets, sources, services, portfolios and objects.

This section describes how the SFX KnowledgeBase update works.

## Revision Packages

Each KnowledgeBase update provided by Ex Libris is called a revision. Each revision has a revision number in the following format:

<YYYY><REV\_NR><HOTFIX\_NR>

This number consists of the year in which the revision was issued, a two digit revision number, and a two digit hotfix number (typically 00, but it can be a

different number in case of hotfixes or if a revision consists of multiple packages of the same type).

Each revision consists of a number of `.run` files. For example:

- A KnowledgeBase software package – The name of this package starts with `sfx-kbsw-update-` and is followed by the revision number. For example: `sfx-kbsw-update-20100500.run`
- A database package – The name of this package starts with `sfx-kbdb-update` and is followed by the revision number. For example: `sfx-kbdb-update-20100500.run`
- An extra package – This package contains files that will be placed in the `/app` directory of the SFX server. For example: `sfx-extra-update-20100500.run`
- A software package – This package is included with the revision if a service pack or minor release is released at the same time as the revision. The name of the software package starts with `sfx-sw-update` and is not followed by the revision number, but includes the release or service pack number instead. For example: `sfx-sw-update-4.1.3.run`

The program that is used to apply the revision is called `rev-up`. To run the complete update, you must apply the revision on all local SFX instances (`sfxlcl41`, `sfxtst41`, etc.) as well as on the `sfxlg1b41` instance.

## The SFX KnowledgeBase Update Process

When you apply an SFX KnowledgeBase update using the `rev-up` program, the program does the following:

- 1 Checks which revisions need to be applied on the SFX server. This makes it possible to apply several revisions in one execution of the program.
- 2 Downloads the various revision packages required for the update.
- 3 Backs up the files and database tables that will be altered by the update.
- 4 Executes the `.run` files in the correct order.

During the software `.run` file update, certain files in the `sfxlg1b41` instance are updated and symbolic links are created from the local instances (such as `sfxlcl41` and `sfxtst41`) to any new files in the `sfxlg1b41` instance.

During the database `.run` file update, the databases of the various SFX instances are updated, using the following general rules:

- All global KnowledgeBase data maintained by Ex Libris and held in the `sfxlg1b41` database is updated automatically with all changes, additions, and deletions.

- Each local instance—with all its local items and localizations—is checked and changes are made if the local information is affected by the global KnowledgeBase changes.

Both global and local changes are stored in the `REPORT` tables in the SFX database, to ensure that all database changes can be checked after each update.

More information about the database update can be found in **Database Update** on page 530.

## Applying an SFX KnowledgeBase Update

---

### IMPORTANT:

Before proceeding with the instructions in this section, it is recommended that you perform a full backup of the SFX server. (See the **SFX Backup and Recovery** section of the *SFX Administration Guide* for details.)

---

---

### NOTES:

Before starting the revision update process, the operating system of the SFX server is checked. The following operating system versions are not supported (and result in the revision update not being applied):

- RH4
  - RH5, 32 bit
  - Solaris 8
  - Solaris 9
- 

The program used to apply an SFX KnowledgeBase update is called `rev-up`. To run this program, the UNIX passwords of `sfxlglb41` and all other SFX instances are required.

### To apply an SFX KnowledgeBase update:

- 1 Log on to the SFX server as the `sfxlglb41` user.
- 2 Type `da` to go to the `admin` directory.
- 3 Start the update program by typing the following:

```
./revision/rev-up
```

The program performs the following steps:

- 1 Downloads the `sfx/revision_v4/list/RevisionList.pm` file from the Ex Libris FTP server. This file contains a list of all SFX version 4.0 revisions and the order in which they need to be applied.
- 2 Compares the `RevisionList.pm` file with the following file on your SFX server: `exlibris/sfx_ver/sfx4_1/.sfx_history`. The `.sfx_history` file lists the revision packages that have been applied to each instance. This comparison results in a list of available revisions that need to be applied on the server.

---

**NOTE:**

If multiple revision packages need to be applied on the server, the revision update applies them one at a time, in the order specified in the `RevisionList.pm` file.

---

- 3 Downloads the necessary update packages from the Ex Libris FTP server, based on the comparison results.

```
SFX Revision Update

Logging at 'exlibris/sfx_ver/sfx4_1/tmp/rev-up-2007-06-26T11:19:46.log'.

Downloading RevisionList.pm... ok
Downloading sfx-extra-update-20070528.run... ok
Downloading sfx-kbdb-update-20070601.run... ok
Downloading sfx-kbsw-update-20070601.run... ok
Downloading sfx-sw-update-20070528.run... ok
```

- 4 Backs up the SFX directories and database tables that may be modified as part of the update process. This backup enables you to roll back to the pre-revision state of the server if a problem occurs during the update process.

More information about the backup can be found in the **Running the KnowledgeBase in Batch Mode** section of the *SFX Advanced User's Guide*.

```
Creating full backup...
  IMPORTANT NOTE: This backup includes limited number of
  software folders and KB tables
  It is not a replacement for system backup!
  Initializing backup...
    Checking permissions...done
    Validating backup folder...done
    Creating temporary folder for backup...done
  Creating KB backup...
    Getting list of instances...done
    Backup KB of 'sfxlcl41' instance...done
    Backup KB of 'sfxtst41' instance...done
    Backup KB of 'sfxlglb41' instance...done
  KB backup done
  Creating SW backup...
    Storing folder 'admin'...done
    Storing folder 'cgi'...done
    Storing folder 'config'...done
    Storing folder 'kldb-reports'...done
    Storing folder 'lib'...done
    Storing folder 'sfxadmin'...done
    Storing folder 'sqltab'...done
    Storing folder 'templates'...done
  SW backup done
  Creating History backup...done
  Finalizing backup...
    Creating rollback script...done
    Creating backup archive...done
    Removing temporary files...done
Backup done
```

- 5 Applies any extra packages included in the revision updates first. The purpose of an extra package is to update or add new files in the SFX/app directory (for example, updates to Perl or Apache). The following is an example of what is displayed on the screen when applying an extra package:

```
--[ Executing extra-20070528 ]--
Verifying archive integrity... All good.
Uncompressing SFX 3 - Revision sfx-extra-update-20070528 -
Built 2007-04-30T14:39:07.....
Started running extra-20070528
Checking if there are missing dependencies...
Unpacking linux.tar into exlibris/sfx_ver/sfx4_1.
Finished extra-20070528
```

- 6 Applies any software package included in the revision updates on sfxlglb41 and all the local instances (such as sfxlcl41 and sfxtst41). For

each local instance, symbolic links are created from the local instances to any new files in the `sfxlglb41` instance.

```
--[ Executing sw-20070528 ]--
Verifying archive integrity... All good.
Uncompressing SFX 3 - Revision sfx-sw-update-20070528 - Built
2007-05-29T09:30:19.....
Started running sw-20070528
Logging at 'exlibris/sfx_ver/sfx4_1/tmp/sw-20070528-20070626-
11:20:45.log'
Checking if there are missing dependencies...
[ 1 ] Unpacking into sfxlglb41.
[ 2 ] Removing deprecated files.
[ 3 ] Going over all children instances of sfxlglb41.
[ Execution per instance ]
[ For instance 'sfxlcl41' ]
Type the 'sfxlcl41' Unix Password Password:
Creating symlinks from sfxlglb41 to sfxlcl41... ok
ok
Removing deprectated files and directories
Executing 'restart' for 'sfxlcl41'.
[ For inst41' ]
Type the 'sfxtst41' Unix Password Password:
Creating symlinks from sfxlglb41 to sfxtst41... ok
ok
Removing deprectated files and directories
Executing 'restart' for 'sfxtst41'.
Finished sw-20070528
```

- 7 Applies any KnowledgeBase software packages included in the revision updates on `sfxlglb41` and all the local instances (such as `sfxlcl41` and `sfxtst41`). For each local instance, symbolic links are created from the local instances to any new files in the `sfxlglb41` instance.

```
--[ Executing kbsw-20070528 ]--
Verifying archive integrity... All good.
Uncompressing SFX 3 - Revision sfx-kbsw-update-20070528 -
Built 2007-05-21T13:55:03.....
Started running kbsw-20070528
Logging at 'exlibris/sfx_ver/sfx4_1/tmp/kbsw-20070528-
20070626-11:27:41.log'
Checking if there are missing dependencies...[ 1 ] Unpacking
into sfxlglb41.
[ 2 ] Going over all children instances of sfxlglb41.
[ Execution per instance ]
[ For instance 'sfxlcl41' ]
Type the 'sfxlcl41' Unix Password:
Creating symlinks from sfxlglb41 to sfxlcl41... ok
ok
```

```
Executing 'restart' for 'sfxlcl41'.  
[ For instance 'sfxtst41' ]  
Type the 'sfxtst41' Unix Password:  
Creating symlinks from sfxlg1b41 to sfxtst41... ok  
ok  
Executing 'restart' for 'sfxtst41'.  
Finished kbsw-20070528
```

- 8 Applies any KnowledgeBase database packages included in the revision updates on the global instance `sfxlg1b41`, and then on all the local instances (such as `sfxlcl41` and `sfxtst41`). The following appears on the screen for each local instance:

```
--[ Executing kbdb-20070601 ]--  
Verifying archive integrity... All good.  
Uncompressing SFX 3 - Revision sfx-kbdb-update-20070528 -  
Built 2007-05-21T15:43:17.....  
Started running kbdb-20070528  
Logging at 'exlibris/sfx_ver/sfx4_1/tmp/kbdb-20070528-  
20070626-11:32:09.log'  
Getting list of instances...ok  
  
[ Analyzing sfxlcl41 ]  
Logging activity in exlibris/sfx_ver/sfx4_1/tmp/kbdb-  
20070528-20070626-11:32:09.log  
Reports: exlibris/sfx_ver/sfx4_1/tmp/kbdb-reports/sfxlcl41-  
20070528-20070626113209  
Working on GLOBAL_CAT_ASSIGN...  
  action: Adding  
  action: Deleting  
  action: Updating  
Working on GLOBAL_CAT_SUBCAT...  
  action: Adding  
  action: Deleting  
  action: Updating  
Working on GLOBAL_SUBCAT...  
  action: Adding  
  action: Deleting  
  action: Updating  
Working on GLOBAL_CAT...  
  action: Adding  
  action: Deleting  
  action: Updating  
Working on PUBLISHER...  
  action: Adding  
  action: Deleting  
  action: Updating  
Working on RELATION...  
  action: Adding  
  action: Deleting  
  action: Updating
```

```
Working on CODEN...
  action: Adding
  action: Deleting
  action: Updating
Working on CONTROL...
  action: Adding
  action: Deleting
  action: Updating
Working on ISBN...
  action: Adding
  action: Deleting
  action: Updating
Working on ISSN...
  action: Adding
  action: Deleting
  action: Updating
Working on LCCN...
  action: Adding
  action: Deleting
  action: Updating
Working on TITLE...
  action: Adding
  action: Deleting
  action: Updating
Working on OBJECT_PORTFOLIO...
  action: Adding
  action: Deleting
  action: Updating
Working on SOURCE_SERVICE...
  action: Adding
  action: Deleting
  action: Updating
Working on SOURCE...
  action: Adding
  action: Deleting
  action: Updating
Working on TS_AUTHENTICATION...
  action: Adding
  action: Deleting
  action: Updating
Working on TARGET_SERVICE...
  action: Adding
  action: Deleting
  action: Updating
Working on TARGET...
  action: Adding
  action: Deleting
  action: Updating
Working on INTERFACE...
  action: Adding
  action: Deleting
  action: Updating
```



```
Working on SERVICE...  
  action: Adding  
  action: Deleting  
  action: Updating
```

- 9 Displays the following after all instances on your server and `sfxlglb41` have been updated successfully:

```
[ All instances in sync ]  
Finished kbdb-20070528  
Sending update email...  
[ rev-up finished ]
```

If all instances on your server cannot be updated, the `sfxlglb41` database cannot be updated and the following message is displayed:

```
[ Update of instance 'sfxlglb41' ]  
  
Checking if revision can be applied to sfxlglb41...no, some  
instances are not ready:  
$VAR1 = [  
    'sfxlcl41'  
    ];  
[ END ]
```

---

**NOTE:**

When the update of an SFX database is complete, log files can be found in the following directory: `exlibris/sfx_ver/sfx4_1/tmp`.

---

The KnowledgeBase database run package includes the global reports as well as all the actual database changes. These global reports are included in `sfxglb41` as part of the global update, and local report information is added if needed during the local instance updates.

After the revision, reports are available via the SFX Admin Center. For details on interpreting and using the information in the report files, see [Update Reports](#) on page 487.

## Software Update

During the software update, SFX applies any software packages included in the revision update to `sfxlglb41` and all the local instances (such as `sfxlcl41` and `sfxst41`). Files in the `sfxglb41` instance are automatically added and updated. Afterwards, for each local instance, the following occurs:

- Symbolic links are created from the local instances to any new files in the `sfxlglb41` instance

- Files symbolically linked to the global instance automatically get updates via the `sfxglb41` instance
- Files with broken symbolic links are not automatically updated. Implementation instructions are provided in the revision update release notes that explain how to manually make changes to these files. Alternatively, the symbolic link to the global file can be recreated (if local changes to the file are no longer needed).

It is possible to configure SFX to send a report about files with broken symbolic links updated during the revision update. This can be done either in the `sfxglb41` instance (for all instances specified) or in the local instance (for the local instance only). The report is sent to one or more email addresses specified in the following configuration files:

- For the global instance: `/exlibris/sfx_ver/sfx_version_3/sfxglb41/config/global_broken_symlinks_update.config__`
- For local instances: `/exlibris/sfx_ver/sfx_version_3/<local instance>/config/local_broken_symlinks_update.config`

If no email address have been specified, reports are not sent.

## Database Update

Each KnowledgeBase database package of a revision update includes a set of files with all the changes, additions, and deletions that need to be made in the `sfxglb41` database. There is one file per database table and type of change (add/update/delete). Each one contains a set of SQL statements that are applied to the `sfxglb41` database.

The following are examples of these files:

- `delta_KB_TARGETS-added-5.sql`
- `delta_KB_TARGET_SERVICES-added-13.sql`
- `delta_KB_TARGET_SERVICES-updated-164.sql`
- `delta_KB_TARGETS-updated-5.sql`

The following is an example of the SQL statements in one of the files:

```
insert into KB_TARGETS
(TARGET_ID,TARGET_NAME,TARGET_PUBLIC_NAME,DESCRIPTION,KB_INTE
RNAL_DESCRIPTION,AGGREGATOR,SITE_AVAILABILITY,TARGET_CHARACTE
R_SET,TARGET_TYPE,THRESHOLD,OWNER,AVAILABLE_FOR,INTERFACE_ID,
STATUS,STATUS_DATE,DISTRIBUTION_STATUS,DISTRIBUTION_STATUS_DA
TE,CREATION_DATE,CREATED_BY,LAST_UPDATE_DATE,LAST_UPDATED_BY,
VERSION_NUMBER,RELEASE_NUMBER,CRUD_TYPE,LOGIC_UPDATE_DATE)
values (2260000000000002,'DAVID','David','','','','SITE
UP','iso-8859-
1','Journal','','OTB','OTB','2260000000000002','ACTIVE','0000
-00-00 00:00:00','READY FOR DISTRIBUTION','0000-00-00
00:00:00','2010-01-14 12:03:31','Ex Libris - KB team','2010-
01-14 12:20:38','Ex Libris - KB team','1','','','CREATE','0000-
00-00 00:00:00');

insert into KB_TARGETS
(TARGET_ID,TARGET_NAME,TARGET_PUBLIC_NAME,DESCRIPTION,KB_INTE
RNAL_DESCRIPTION,AGGREGATOR,SITE_AVAILABILITY,TARGET_CHARACTE
R_SET,TARGET_TYPE,THRESHOLD,OWNER,AVAILABLE_FOR,INTERFACE_ID,
STATUS,STATUS_DATE,DISTRIBUTION_STATUS,DISTRIBUTION_STATUS_DA
TE,CREATION_DATE,CREATED_BY,LAST_UPDATE_DATE,LAST_UPDATED_BY,
VERSION_NUMBER,RELEASE_NUMBER,CRUD_TYPE,LOGIC_UPDATE_DATE)
values (2260000000000003,'DAVID2','sfgrfv','','','','SITE
UP','iso-8859-
1','Journal','','OTB','OTB','2260000000000003','ACTIVE','0000
-00-00 00:00:00','READY FOR DISTRIBUTION','0000-00-00
00:00:00','2010-01-14 12:10:03','Ex Libris - KB team','2010-
01-14 12:20:39','Ex Libris - KB team','1','','','CREATE','0000-
00-00 00:00:00');
```

The KnowledgeBase package also contains the global report data for the revision. This report data is inserted into the `sfxglb41` database during the revision update.

The following are examples of these files:

- `report_KB_TARGETS_REPORT-added-5.sql`
- `report_KB_TARGETS_REPORT-deleted-2.sql`
- `report_KB_TARGETS_REPORT-updated-3.sql`

First, using the SQL statements, the revision update program applies all the additions, changes, and deletions on the global instance. This is done automatically, without checking for localizations.

Afterwards, the revision update program goes over the databases of all local instances (`sfxlcl41`, `sfxst41`, and so forth) in succession and implements changes needed as a result of global database changes.

Changes are needed in the local instances in the following cases:

- **In case of database cleaning for new objects (removing object duplicates)**
  - Duplicate objects can occur in SFX if you add local objects (with unique

identifiers such as ISBN or ISSN) that are then added to the global Knowledgebase as part of the revision update. To prevent duplicates, SFX deletes the duplicate local objects.

For more information, see [Database Cleaning for New Objects \(Removing Object Duplicates\)](#) on page 534.

- **In case of duplicate object clean-up** – As part of global KnowledgeBase maintenance, SFX periodically deletes duplicate objects found in the SFX KB. The revision update moves activation and localizations of portfolios from the duplicate object that is deleted to the object that is kept.

For more information, see [Duplicate Object Clean-Up](#) on page 535.

- **As a result of global deletions** – Activation and local overrides of global information are stored in the local instance. This information needs to be removed in case of global deletions. Additionally, sometimes local information is connected to global information (for example, a local portfolio is connected to a global target service). If there are deletions of global data, the locally created information may be affected.
- **In case of new global database items** – if AutoActive has been set to Yes, activate new object portfolios added during the update of `sfxglb41` in the local instances.

If the revision update adds new objects with ISSN or other unique identifiers, the revision update needs to prevent ID duplication if the customer has added a local object with the same identifier.

- **In case of updates to global database items** – when AutoUpdate is turned on in the local instance, local overrides of global information are removed. For more information on AutoUpdate, see below.

## AutoActive

Generally targets allow you to purchase specific journals from a package. In this case, you are required to manually activate each journal you purchased for it to appear in the SFX menu. However, some targets are aggregators, meaning that you are required to purchase all the objects in a package. In this case, you can use AutoActive to automatically activate all of the journals in a package, since there is no need to specify them. SFX also allows you to use AutoActive even if the target is not an aggregator.

AutoActive settings are configured from the Edit Target Service window. (For more information, see [Editing Target Services](#) on page 67.) The following options are available:

- **Aggregator Settings** – Automatically activates the object if the target is an aggregator. If you select this option, the value `INHERIT` is stored in the SFX database.

- **Yes** – Automatically activates the object even if the target is not an aggregator
- **No** – Does not automatically activate the object even if the target is an aggregator

By default, SFX is set to **Aggregator Settings**.

## AutoUpdate

Activating AutoUpdate automatically removes local overrides of target service and object portfolio parser and parse param information. It is set from the Edit Target Service window. (For more information, see [Editing Target Services](#) on page 67.)

By default, the revision update makes changes only to global fields (global threshold, parser, and parse param) and does not make any changes to local fields, leaving any local overrides intact.

The AutoUpdate option overrides this default behavior and removes local overrides of parser and parse param information.

If AutoUpdate is set to , SFX removes local overrides of the parser and parse param fields of object portfolios and target services.

If the global value of the parser and parse param fields is updated during the revision update (regardless of whether or not its value is equal to the local one) SFX automatically deletes the local override.

This would apply to the following levels and fields:

- Target service: parser and parse\_param
- Object portfolio: parser and parse\_param

This option is typically used when the library wants to temporarily override the parser and/or parse param information because of linking problems, but wants to go back to using the global parser and parse param information after the next revision update (when a global fix to the linking problem is released).

## Database Cleaning for Global Deletions

The revision update program cleans the database in the following cases:

- When a global object is deleted, the revision update program deletes local object portfolios and the local override of title, as well as any existing local attributes.

All details regarding the local values of the deleted object portfolio and localizations of the global object are stored in the local revision report tables and are visible in the revision update reports.

- When a global target, target service, portfolio, or source service is deleted, the revision update program deletes local linking information and inventory information for the DEFAULT and for institutes.

Information regarding activation and local overrides of the deleted global entries is stored in the local revision report tables.

- If local database items are connected to deleted global entries.
  - If local target service information is connected to a global target that is deleted, the local target service information is deleted. Details regarding the local target service information are stored in the local revision report tables.
  - If local object portfolios are connected to a global target service that is deleted, the local object portfolio is deleted. Details regarding the local object portfolio information are stored in the local revision report tables.

## Database Cleaning for New Objects (Removing Object Duplicates)

Duplicate objects can occur in SFX version 4 because objects can now be loaded by ISSN and ISBN via KBManager.

This process does the following:

- Finds duplicate local objects based on ISSN/ISBN/LCCN/CODEN.  
SFX objects are duplicates if they have:
  - Identical values for ISSN, LCCN, or CODEN. SFX checks that the same value exists for both the local and global object.
  - Identical value AND identical subtype (PRINT\_HBK, PRINT\_PBK, ELECTRONIC, or INCORRECT) for ISBNs. This means that for ISBNs with the same value but different subtypes are not treated as duplicates.
- Deletes the local object.
- Changes the main title to a local title. All other titles are deleted. All other attributes/identifiers are deleted except for the LOCAL attribute and local category assignments.
- Moves the object portfolio pointer to the new KnowledgeBase object.

Reports on this process are available in the Revision Reports section of the SFXAdmin Center with the same revision release number, except that the last two digits are 99 instead of 00.

---

### NOTES:

- Changing the main title to a local title is not done if a local title already exists for the global object or if the title requirements for the global and local object are not identical. For example, if the global object is English

(where one main title is required), and the local object is Japanese (two main titles are required), the local title is deleted and not connected to the global object.

- If a duplicate local object is connected to more than one global object (for example, one local object with an ISSN or EISSN where the ISSN matches global object1 - and the EISSN matches global object2) only one of the global objects is selected to which the local title (for example) is moved.

The following is the order of priority of the identifiers:

- ISSN - print
  - ISSN - electronic
  - ISBN - print
  - ISBN - electronic
  - LCCN
- This step in the database update can also be performed separately via **ServerAdminUtil > 4 Database maintenance > 15 Remove local duplicate objects**.
- 

## Duplicate Object Clean-Up

As part of global KnowledgeBase maintenance, SFX periodically removes duplicate objects found in the SFX KB.

Duplicate objects may have been loaded in the past because of incorrect object data received from vendors and the SFX loading programs were not able to detect that objects in different vendor load files were in fact the same objects.

When duplicates are detected, SFX merges the two objects by moving the portfolios and other object attributes from object 1 to object 2 and then deleting object 1. These changes are released as part of the Revision Update package.

During the Revision Update, SFX performs the following steps for each of the local instances to reduce manual work for customers:

- Localizations (such as local attributes and local titles) are moved from object 1 to object 2.
- Local portfolios are moved from object 1 to object 2.
- All portfolio activation and local linking information is moved from object 1 to object 2.
- Duplicate object portfolios with the same targets services, parse params, and thresholds are deleted. All activations and localizations are moved from the deleted object portfolio to the one that is kept.
- If identical global object portfolios exist for both object 1 and object 2, the duplicate object portfolio for object 2 is deleted and not moved. Object

portfolios are treated as duplicates if they have the same target services, parse params, and thresholds. All activations and localizations are moved from the deleted object portfolio to the one that is kept (except if the object portfolio for object 1 already has activations and localizations).

Object portfolio deduplication occurs during duplicate object clean-up. This means that if the object portfolios of the object to be deleted and the object to be kept are the same, the object portfolios are deleted and not moved.

All changes are reported in the Revision Update reports as updated portfolios, updated object titles, and updated local object attributes.