



SFX VERSION 3.0

SFX Web Training Exercises



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Exercise Unit 1: SFX Web Training #1

1.1 Activating an Aggregator Target

Goal:

Activate the Target, Target Service, and all available Object Portfolios for an SFX Target in order to enable linking for the resource.

Task:

Your library has purchased a new aggregator database. You would like to allow your patrons to link to the full text resources in the aggregator database via SFX.

Suggested actions:

1. Filter for a target. You can find your own or use one of the following targets:
 - EBSCOHOST_ACADEMIC_SEARCH_COMPLETE
 - PROQUEST_ABI_INFORM_GLOBAL
 - GALEGROUP_ACADEMIC_ONEFILE
 - WILSON_OMNIFILE_FT_MEGA
2. Activate the Target by pressing on the 'N' button. The text will turn black and the button will display as a yellow 'Y' indicating that you have activated the target
3. Click on 'S' to navigate to the Target Service, activate the Target Service by pressing on the 'N' button
4. Press on 'P' to navigate to the list of Object Portfolios.
5. Use the "activate all" button to activate all the object portfolios associated with this target service. After choosing the button, the text for all of the object portfolios will turn black and each one of the buttons will display a yellow 'Y' indicating that you have activated all of the object portfolios for this particular target service.
6. Test the activation of one of the titles by clicking the on one of the Test SFX buttons.

NOTE: Only use the "activate all" or "deactivate all" buttons at the Object Portfolio level

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Take Note:

- Are there multiple target services for the target you chose?
- Are the object portfolios for the target service you did not choose activated?

1.2 Find a Bibliographic Item using the ISSN or ISBN

Goal:

Be able to search for a particular title in the SFX KnowledgeBase using the ISSN or ISBN of the title.

Task:

Your library is curious if a particular title is available in the SFX KB. Your library has decided to use the Search Objects function found in the SFX Admin Center to help it find the title.

Suggested actions:

1. Choose one of the ISSNs/ISBNs below and search for the title in the ISSN or ISBN field:
 - 0000-0019
 - 0033-0779
 - 0003-0554
 - 0-07-141620-X
 - 0-07-011768-3
 - 977-5945-24-0
2. Examine the object record that appears
3. Click the 'P' button to find the different object portfolios associated with the record.

Take Note:

- What targets and target services are associated with the object portfolios?
- How are related titles handled in the object record?

1.3 Find a Bibliographic Item using the Title

Goal:

Be able to search for a particular title in the SFX KnowledgeBase using the ISSN or ISBN of the title.

Task:

Your library is curious if a particular title is available in the SFX KB. Your library has decided to use the Search Objects function found in the SFX Admin Center to help it find the title.

Suggested actions:

1. Choose one of the titles below and search for it in using the title field:
 - Bee culture
 - Tissue antigens
 - Abacus
 - Journal of the American Ceramic Society
2. Examine the object record that appears
3. Click the 'P' button to find the different object portfolios associated with the record.

Take Note:

- Do a search for Bee* What titles appear in the resulting list?
- What targets and target services are associated with the object portfolios?
- How are related titles handled in the object record?

1.4 Add Thresholds Using the Threshold Composer

Goal:

Create local thresholds that reflect the library's specific date coverage access.

Task:

Your library purchased the Elsevier Science Direct Package. Normally when Elsevier sells this package they provide customers with access back to the first volume for all of the journals. In order to get a reduced rate, your library negotiated to have all of the titles from 1997 to the present. You would like these institution specific dates of coverage to be reflected in SFX.

Suggested actions:

1. Find the **ELSEVIER_SD_SCIENCE_DIRECT_COMPLETE** Target in the Target tables by filtering for the target name.
2. Activate the Target by clicking the 'N' button located next to the target
3. Navigate to the target service by clicking the 'S' button located next to the target.
4. Activate the Target Service by clicking the 'N' button located next to the target service.
5. Click the 'P' button to view the Object Portfolios associated with the target and target service.
6. Activate one of the object portfolios in the list.
7. Click the 'E' button to view the object portfolio record.
8. Observe the global threshold and the space for the local threshold
9. Click the compose button located underneath the local threshold box.

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10. Fill in the year in the 'First Publication' section and hit submit.
11. Confirm that the date is what you were expecting and hit submit again.
12. Observe the threshold in the Object Portfolio record and hit submit to exit the record and put your changes in effect.
13. Click the Test SFX button and view the date information reflected on the SFX Menu.

Take Note:

- If SFX does not know the volume and issue for a threshold it instead utilizes the term 'undef', meaning that the volume and issue are not defined.
- Notice that the threshold composer also allows you to place an end date for a threshold.

Exercise Unit 2: SFX Web Training #2

2.1 Activating a Selective Package Target

Goal:

Activate the Target, Target Service, and all available Object Portfolios for an SFX Target in order to enable linking for the resource.

Task:

Your library has purchased new e-journals from an e-journal provider. You would like to allow your patrons to link to the full text of articles in the e-journals via SFX.

Suggested actions:

1. Filter for **SYNERGY_BLACKWELL_COMPLETE** in the SFX Targets Section of the Admin Center.
2. Activate the Target by pressing on the 'N' button. The text will turn black and the button will display as a yellow 'Y' indicating that you have activated the target
3. Click on 'S' to navigate to the Target Service, activate the getFullTxt Target Service by pressing on the 'N' button next to the service.
4. Press on 'P' to navigate to the list of Object Portfolios.
5. Find one of the following titles in the object portfolio list and activate it by clicking on the 'N' button next to the title.
 - 1600-5368 Acta crystallographica
 - 0002-7766 American business law journal
 - 0001-7272 Acta zoological
 - 1541-4337 Comprehensive reviews in food science and food safety
 - 0001-690X Acta psychiatrica Scandinavica
 - 0001-6314 Acta neurologica Scandinavica
6. Test the activation of the title by clicking the on the Test SFX button located to the right of it.

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Take Note:

- Are there multiple target services for the target you chose?
- Are the object portfolios for the target service you did not choose activated?
- Click on the Test SFX button next to a title you did not activate. Does it appear on the SFX Menu?

2.2 Activating One Title in a Selective Package

Goal:

Activate the one Object Portfolio for an SFX Target in order to enable linking for the resource.

Task:

Your library has purchased new e-journals from an e-journal provider. You would like to allow your patrons to link to the full text of articles in the e-journals via SFX.

Suggested actions:

1. Filter for **SYNERGY_BLACKWELL_COMPLETE** in the SFX Targets Section of the Admin Center and check to make sure that the target and target service are active.
2. Click the Search Objects link in the top navigation bar
3. Search for one of the following titles using the ISSN search function or the title search function:
 - 0012-2017 Dialectica
 - 0012-9682 Econometrica
 - 0017-467X Ground Water
 - 0018-2370 The Historian
 - 0023-8333 Language learning
4. Click on the 'P' button at the top of the object record to view all of the object portfolios related to the title.
5. Find the object portfolio related to **SYNERGY_BLACKWELL_COMPLETE** and activate the object portfolio.
6. Test the activation of the title using the Test SFX button located to the right of the title.

Take Note:

- Does the title you have selected related to multiple **SYNERGY_BLACKWELL_COMPLETE** object portfolios? If so what target services are associated with each of the object portfolios?
- Click on the Test SFX button next to a target that is not active. Does something appear on the SFX Menu?

2.3 Batch Activating a Select Group of Object Portfolios

Preparations Needed:

In order to run this exercise you will need to prepare a text tab delimited file. You can create a text tab delimited file using Microsoft Excel.

- In column 1 include a list of ISSNs – this will be your Primary Key
- In column 2 type the word ACTIVE next to each ISSN – this will be the object portfolio's availability. Conversely you can use the word INACTIVE to turn titles off.

To save the file as a text tab delimited

- Choose 'File'
- Choose 'Save As...'
- In the resulting pop-up window choose where you would like to save the file
- Give your file a name in the 'File Name' box
- Choose from the 'Save As Type' box text tab delimited.

Goal:

Update a select group of object portfolios for a specific target and target service

Task:

Your library just purchased a number of titles in Wiley Interscience. You would like to activate the titles in batch form via the SFX Admin Center.

Suggested actions:

1. Click the dataloader link from the SFX Admin Center.
2. Select Target and Target Service WILEY_INTERSCIENCE-getFullTXT.
3. A new drop down menu should appear. From the list select the subtarget and service WILEY_INTERSCIENCE_JOURNALS-getFullTXT.
4. Specify input file name. Click on the BROWSE button, find the file you prepared, and upload it to dataloader.

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5. Select the type of each column in your input file:
 - a. Column 1 (Primary Key) – choose ISSN out of drop down menu.
 - b. Column 2 – choose AVAILABILITY.
6. Choose the 'Update' box in the 'Load Type' section at the bottom of the screen. This will activate the titles that already exist in SFX.
7. Click on "Submit".
8. Download the Error Report to check for any errors.

Take Note:

- What are the different types of error messages that you see in the error report?
- Availability words must be entered in all capital letters in order for dataloader to act upon the column.
- Local thresholds can also be used with dataloader. For more information on creating local thresholds using excel, see *User Guide Part 2 Appendix G: How to Use Excel to Create Local Thresholds*.

2.4 Inputting your Proxy Server Information

Goal:

Set up your proxy server so that users off-site can access your materials via SFX.

Tasks:

Enter your proxy information into SFX using the information you gathered in your workbook.

Suggested Actions:

1. From the SFX Admin Center main page click the Menu Configuration link.
2. In the top links, click the Proxy/Crossref link
3. Choose your proxy server type from the drop down box
4. Select how you would like to use the proxy server using the Use Proxy radio buttons
5. Enter your proxy server address in the Proxy Address (URL) box
6. Enter your proxy server's IP address in the Proxy IP box
7. Click submit

2.5 Setting Up A Selective Proxy

Goal:

If you have chosen to implement a selective proxy, choose which targets you would like to proxy.

Tasks:

Check the proxy box for all of the targets you have chosen to proxy.

Suggested Actions:

1. In the targets section of the SFX Admin Center, find a target you would like to proxy.
2. Click the S button associated with the target to move to the target service level.
3. Click the E button next to the active target service to view the target service record.
4. Check the proxy box
5. Click submit.

Take Note:

- It is possible to proxy a target at the target level, however not all of the services you have turned on will need to be proxied. For example, most publishers provide abstracts and table of contents free of charge.
- Wherever you choose to check the proxy box, make sure that all staff members using SFX know where to check the box.

2.6 Inputting Username Password Information

Goal:

Input Username/Password Information in order to enable linking to particular targets.

Tasks:

Enter your username/password information into SFX using the information you gathered in your workbook.

Suggested Actions:

1. In the targets section of the SFX Admin Center, find a target that requires Username/Password information.
2. Click the S button associated with the target to move to the target service level.
3. Click the U/P button next to the active target service to view the information you need to input
4. Click the E button next to the flag you would like to input information for.
5. Enter your flag value and click submit
6. Repeat steps 4 and 5 as necessary

Take Note:

- The Target Configuration Guide will help you as you enter U/P information into SFX. Keep in mind that this Guide is a reference tool that will not only provide what information goes in the U/P section, but also other information about implementing a particular target.

Exercise Unit 3: SFX Web Training #3

3.1 Deconstructing an OpenURL

Goal:

Learn about the types of metadata contained in an OpenURL in order to better understand how SFX utilizes the technology.

Task:

Dissect one of the following OpenURLs to determine why your users can not get to the full text of the article.

Example #1

OpenURL:

```
http://your_base_url_here/instance_name?genre=article&issn=00000019&title=Publishers Weekly&volume=239&issue=55&date=19991228&atitle=ABA mulls superstore resolution; FTC official to speak at NEBA.&spage=8&sid=EBSCO:Academic Search Premier&pid=<authors></authors><ui>9301103783</ui><date>19921228</date><db>Academic Search Premier</db>
```

Suggested Actions:

1. Copy the above link and paste it into your web browser.
2. Click one of the links found on the SFX Menu
3. Observe that you are unable to get to the full text.
4. Do a search for "ABA mulls superstore resolution" in the database.
5. Compare the citation information from EBSCOHost and the citation information on the SFX Menu.

Example #2

OpenURL:

```
http://your_base_url_here/instance_name?genre=document&issn=00000019&title=Publishers Weekly&volume=251&issue=51&date=20041220&atitle=Olson: Random House To Build on Strengths.&spage=5&sid=EBSCO:Academic Search Premier&pid=<ui>15420770</ui><date>20041220</date><db>Academic Search Premier</db>
```

Suggested Actions:

1. Observe the metadata in the above OpenURL.
2. Copy the above link and paste it into your web browser.
3. Observe the citation information on the SFX Menu.
4. Remove the genre from the OpenURL and refresh the SFX Menu.
5. Observe the new menu.

3.2 Creating a Link

Goal:

Understand how SFX Target Parsers create links using metadata.

Task:

Using the URL formulas, create links for the 2 of the 4 citations listed below.

Example #1

URL Formula:

[http://www.emeraldinsight.com/rpsv/cgi-bin/cgi?body=linker&reqidx=ISSN\(YEAR\)VOL:ISSUE.STARTPAGE](http://www.emeraldinsight.com/rpsv/cgi-bin/cgi?body=linker&reqidx=ISSN(YEAR)VOL:ISSUE.STARTPAGE)

Citation:

Author: Jefcoate, Graham
Article: "Gabriel: Gateway to Europe."
Journal: Program **ISSN:** 0033-0337
Year: 2006 **Volume:** 40
Issue: 4 **Pages:** 325-333.

Suggested Actions:

1. replace **ISSN** in the URL with the citation's ISSN
2. replace **YEAR** in the URL with the citation's year
3. replace the **VOL** in the URL with the citation's volume
4. replace the **ISSUE** in the URL with the citation's issue
5. replace the **STARTPAGE** in the URL with the starting page of the article.

Example #2

URL Formula:

<http://JKEY.oxfordjournals.org/cgi/content/full/VOL/ISSUE/STARTPAGE>

Citation:

Author: Fryer, Roland
Article: "The Black-White Test Score Gap Through Third Grade"
Journal: American Law and Economics Review
JKEY: aler **Year:** 2006
Volume: 8 **Issue:** 2
Pages: 249-281

Suggested Actions:

1. replace **JKEY** in the URL with the citation's jkey
2. replace the **VOL** in the URL with the citation's volume
3. replace the **ISSUE** in the URL with the citation's issue
4. replace the **STARTPAGE** in the URL with the starting page of the article.

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Example #3

URL Formula:

[http://www.emeraldinsight.com/rpsv/cgi-bin/cgi?body=linker&reqidx=ISSN\(YEAR\)VOL:ISSUE.STARTPAGE](http://www.emeraldinsight.com/rpsv/cgi-bin/cgi?body=linker&reqidx=ISSN(YEAR)VOL:ISSUE.STARTPAGE)

Citation:

Author: Berg, Elisabeth
Article: "Emphasizing technology: socio-technical implications"
Journal: Information Technology & People
ISSN: 0959-3845 **Year:** 2005
Volume: 18 **Issue:** 4
Pages: 343-358.

Suggested Actions:

1. replace **ISSN** in the URL with the citation's ISSN
2. replace **YEAR** in the URL with the citation's year
3. replace the **VOL** in the URL with the citation's volume
4. replace the **ISSUE** in the URL with the citation's issue
5. replace the **STARTPAGE** in the URL with the starting page of the article.

Example #4

URL Formula:

<http://JKEY.oxfordjournals.org/cgi/content/full/VOL/ISSUE/STARTPAGE>

Citation:

Author: Hui Li, Bing
Article: "Inhibitory Effects of Flavonoids on Animal Fatty Acid Synthase"
Journal: The Journal of Biochemistry
JKEY: jb **Year:** 2004
Volume: 135 **Issue:** 1
Pages: 85-91

Suggested Actions:

1. replace **JKEY** in the URL with the citation's jkey
2. replace the **VOL** in the URL with the citation's volume
3. replace the **ISSUE** in the URL with the citation's issue
4. replace the **STARTPAGE** in the URL with the starting page of the article.

Exercise Unit 4: SFX Web Training #4

4.1 Adding a Local Target to SFX with no Object Portfolios

Goal:

Add a local target to the SFX KnowledgeBase

Tasks:

Your institution would like to create a static link to your library's Ask A Librarian page.

Suggested Actions:

Add the Target and Target Service

1. In the Targets section of the SFX Admin Center click the "Add New Target" button.
2. Give your target an internal name that will appear in the Target section of the SFX Admin Center. For the purposes of this exercise use:
ASK_A_LIBRARIAN
3. Give your target a public name your users will see on the SFX Menu. For the purposes of this exercise use:
Ask a Librarian
4. Choose the target most closely related to this service. Keep in mind that like services are grouped together on the SFX menu. For the purposes of this exercise use:
getWebService
5. Click submit to save your new Target

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Edit the Target Service

1. Click the S button to move down to the target service records available for the ASK_A_LIBRARIAN target.
2. Click the E button next to the getWebService you just created.
3. In the public name section of the target service record, enter the words that you would like to appear in front of the target name. For the purposes of this example enter:
Questions?
Your new target will read: Questions? Ask a Librarian
4. Set the object lookup option
 - a. For targets with object portfolios set the object lookup to yes
 - b. For target without object portfolios set the object lookup to no

For the purposes of this exercise set the object look up to no. This will tell SFX that no object portfolios are associated with this target.

Create a Linking Structure

Your library has decided to use the Generic target parser to create a link to the libraries webpage.

1. At the target service level, indicate that you will be using the Generic target parser by typing "Generic" without the quotes, in the target parser box.
2. At the target service level, enter your linking structure into the parse param field. Below is an example linking structure
if () "http://my.library.edu/ask.html"
This will link your users directly to the webpage put in quotes

NOTE: For more information about the Generic Target Parser see *User Guide Part 1 Section 6.5 Using the Generic Target Parser*

4.2 Adding an Object Portfolio Manually To a Target

Goal:

Add a new object portfolio to an already existing target.

Tasks:

Your library has decided to add an object portfolio to the MISCELLANEOUS_FREE_EJOURNALS target in SFX.

Suggested Actions:

Activate the Target and Target Service

1. Find MISCELLANEOUS_FREE_EJOURNALS target in the list of targets.
2. Activate the target by click the N button next to the target record.
3. Click the S button to move down to the target service records available for the target.
4. Activate the target service by clicking the N button next to the getFullTxt service.

Add an Object Portfolio

1. Click the P button next to the getFullTxt service.
2. Click the Add New Portfolio button in the upper left hand corner. A new window will open.
3. Click the Select Object button and another window will open.
4. Search for an object using the title or an ISSN. For the purposes of this exercise use the following journal:
ISSN: 0333-256X
Title: Rangifer
5. Click the Select Object button next to the object you would like to create an object portfolio for.
6. Click the Compose button below the Local Threshold box.
7. In the resulting window enter in dates of coverage and click the submit button.
8. Confirm that the threshold is right and click the submit button.

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Create a Linking Structure

The MISCELLANEOUS_FREE_EJOURNALS target uses the Bulk::BULK parser. To create a link for an individual object portfolio follow these steps:

1. In the object portfolio record enter the following linking structure into the record's parse param field:
`jkey="http://www.twodeadducks.net/rangifer/index.php"`

This will link your users to the URL within quotes.

2. Review the record for errors and when you're satisfied everything is correct, click the submit button.
3. Test your new object portfolio by clicking the test SFX button next to the object portfolio.