



# **bX-SFX Configuration Guide**

bX Version 1.0

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## Updates to This Guide

This guide contains the following update:

- The Ex Libris e-mail address has been updated. For more information, see [Enable Publishing from the SFX Admin Center Menu](#) on page 49.



# 1

---

## bX-SFX Configuration Introduction

This section includes:

- **Overview** on page 7
- **Prerequisites** on page 8

### Overview

bX is an additional service available to SFX customers that provides article recommendations based on a regular SFX request. In a bX/SFX product configuration, SFX provides the following:

- Platform for linking user requests for articles to other online databases.
- Linkage to the bX recommendation service.
- Platform to allow bX to harvest SFX usage logs.
- Display options and viewing environment for bX matches/recommendations.
- Log of activity.

The bX service contains millions of article recommendations; and Ex Libris continues to grow the bX database by harvesting additional data and building more recommendation sets. You can view your institution's own usage of bX and changes over time by using the SFX Statistics module in the **Usage Statistics** chapter starting on page 57 of this document.

For additional information, see EL Commons (<http://www.exlibrisgroup.org>).

## Prerequisites

In order for bX and SFX to work together, you need to do the following:

- Complete online registration for bX  
See the *bX Registration Guide* for more information.
- Complete bX License Entry with the license key that you receive (**Registration Configuration** on page 9)
- Complete activation of a new bX target using KBManager in SFX
- Configure the `bx.config` file to define how SFX processes and displays bX recommendations on the SFX menu and handles publishing if you purchased bX services as a contributor

See **Configuration for bX Recommendations** on page 29 and **Configuration for bX Publishing** on page 43 for more information.

- Configure firewalls (if required)

In order to get a recommendation as a subscriber/contributor, set your environment to accommodate outgoing SFX requests from the SFX server to `bx2.hosted.exlibrisgroup.com` on port 80.

See **Configure Firewalls (If Required)** on page 48 for additional firewall information.



# 2

---

## Registration Configuration

This section includes:

- [Overview](#) on page 9
- [License Key](#) on page 9
- [Multiple SFX Instances - License Key](#) on page 11
- [bX Configuration and Status](#) on page 11
- [Multiple Instances - Configuration](#) on page 12

### Overview

Once you receive your e-mail confirmation from online registration, you are ready to proceed to registration configuration. The e-mail confirmation contains the license key that you need to begin the configuration procedure.

### License Key

The license key you received in your confirmation e-mail is a one-time-use ID needed by the system to start your bX license. See the procedure below to enter your license key. If there is a problem with your license key, contact [registration@exlibrisgroup.com](mailto:registration@exlibrisgroup.com).

---

**NOTE:**

If you also install bX in your Primo environment, the SFX license key is separate and distinct from any token that you may receive for a bX implementation with Primo.

---

Once you successfully enter your license key, activate the SFX target for bX (see [Activation](#) starting on page 17); and for contributors, complete the steps for publishing (see [Configuration for bX Publishing](#) starting on page 43).

**To begin the bX configuration procedure from the SFX Admin Center:**

- 1 Click the **bX configuration** link. See **Figure 1**.



Figure 1: bX Configuration Option (SFX V4)

bX Recommender Service	
Access	Tool Name
✓	<a href="#">bX Overview</a>
✓	<a href="#">Register for bX</a>
✓	<a href="#">bX configuration</a>

Figure 2: bx Configuration Option (SFX V3)

- 2 Enter your license key and click **Submit License**. See **Figure 3**.

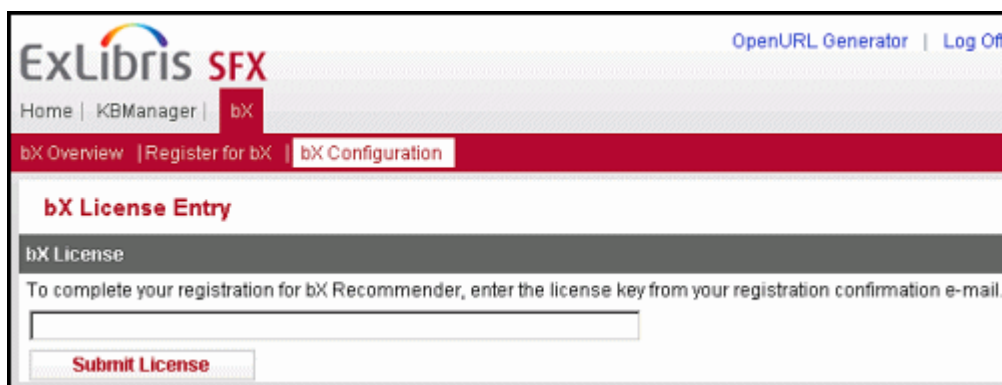


Figure 3: License Key Dialog Box (SFX V4)

The image shows a dialog box titled "bX License Entry". It has a light green background. At the top, the title "bX License Entry" is centered. Below the title, there is a large rectangular text input field with the label "bX License" at its top-left corner. Below this input field, there is a smaller, horizontal text input field. At the bottom center of the dialog box, there is a button labeled "Submit License".

Figure 4: License Key Dialog Box (SFX V3)

## Multiple SFX Instances - License Key

To set up multiple SFX instances with the license key:

- 1 Connect to the server as the sfxglb41 (sfxglb3 for SFX V3) user.
- 2 Type `da` to go to the admin directory.
- 3 Type `./server_admin_util` to access the Main Menu.
- 4 Select **5 Statistics**.
- 5 Select **7 bX Registration & Configuration**.
- 6 Select **3 Initialize bX license**.
- 7 Enter the bX license key that you received.

Using this method, the license is entered for all instances on the server.

## bX Configuration and Status

Once you are validated by entering your license key, the system displays your initial bX configuration and status on the bX Configuration & Status dialog box. It displays the following information:

- Your bX Institution ID  
This is the ID that is your permanent identification from this point forward.
- Your publishing status  
This is the option you can update to activate publishing. Select the **Enable** option from the drop-down list to activate publishing. See the *bX-SFX Configuration Guide* for details regarding publishing.
- The link for you to change settings for your service configuration

## Multiple Instances - Configuration

If you have registered for bX with multiple instances, you are a contributor, and you entered the license from the sfxglb41 (or sfxglb3) Unix prompt, you need to log on to each instance and change the individual configuration status from the SFX Admin Center menu to enable publishing. In this way, you (as the administrator) can more precisely control which instances begin publishing to the instance OAI\_REPOSITORY table.

# 3

---

## My Profile

This section includes:

- [My Profile Logon](#) on page 13

### My Profile Logon

My Profile is a Web interface to configure/modify your options for bX. It can be accessed from the SFX Admin Center after you have completed registration configuration.

**To access My Profile:**

- 1 Log on to SFX Admin Center.
- 2 Click **bX Configuration** from the bX Recommender Service section.
- 3 Click **Change Settings** for the bX Service Configuration option. See [Figure 5](#).

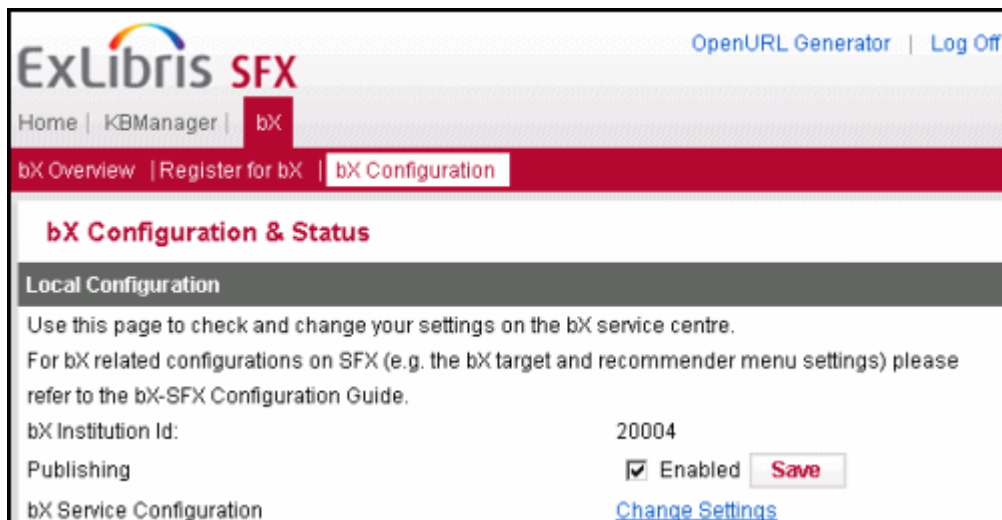


Figure 5: Change Settings Option (SFX V4)

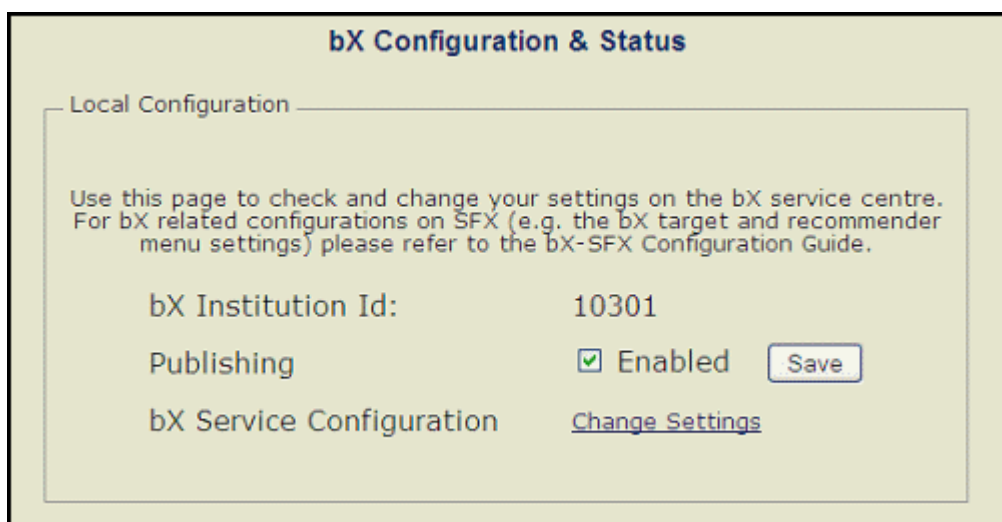



Figure 6: Change Settings Option (SFX V3)

Single-site bX customers connect immediately to the tool called My Profile where configuration changes can be made.

Consortium bX customers are prompted with a log-on screen (see [Figure 7](#)) for which the consortium administrators have access.

ExLibris bX bX Overview | Contact Us

 **My Profile > Login**

This site has registered as a consortium, and only the registered consortium administrator may configure bX on behalf of the consortium. Please enter your login id and password to continue to the My Profile page.

\* indicates a required field

\* **Login id:**

\* **Password:**

[Forgot your login id or password?](#)

**Log In**

Figure 7: Consortium Logon

It is currently not possible for consortium members to make changes to consortium bX configurations.





# 4

---

## Activation

This section includes:

- [Overview](#) on page 17
- [KBManager bX Activation](#) on page 18
- [SFX Menu Customization](#) on page 20

### Overview

To use the bX target that displays recommendations on your SFX menu, you need to activate the bX target and the connected getRecommendation target service using the SFX KBManager.

The target has a special plug-in threshold to ensure that the bX target displays in the SFX menu when recommendations are available.

---

**NOTE:**

The configuration of the SFX menu placement of the bX target is slightly different from the configuration of the other SFX targets. The display of the bX target is not handled by the standard SFX Admin Center configuration options in `config/services_public_name.config_` (for the advanced menu template) or `SFXAdmin > Menu Configuration > Menu Design > Service Precedence` (for the simplified menu template). Instead, it is controlled by the `bx_location` parameter as described in [Table 2](#) on page 36.

---

## KBManager bX Activation

This section describes how to activate the bX target and bX services.

### Target Activation

To activate the bX target:

- 1 Click **Targets** from the KBManager menu. See **Figure 8 (Figure 9)**.



Figure 8: KBManager Menu - Targets Option (SFX V4)

KBManager	
Access	Tool Name
✓	<u>Sources</u>
✓	<u>Targets</u>
✓	<u>Search Objects</u>
✓	<u>User Parameters</u>
✓	<u>Institutes</u>

Figure 9: KBManager Menu - Targets Option (SFX V3)

- 2 Select the bX target and click the **Activate** button. See **Figure 10 (Figure 11)**.

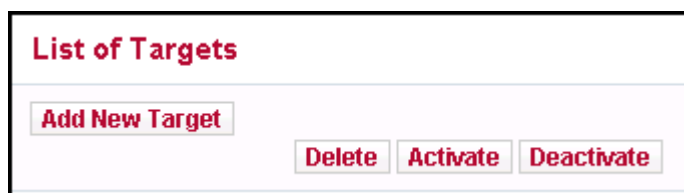


Figure 10: Activate Button (SFX V4)



Figure 11: Activate Button (SFX V3)

When you successfully activate bX, Y displays in the Active column.

## Service Activation

### To activate bX services:

- 1 Click **S** in the BX\_RECOMMENDER\_SERVICE target row to display/add service options for the BX\_RECOMMENDER\_SERVICE target. See **Figure 12 (Figure 13)**.

#	Target	Threshold	Modified	Active	Action
72	BX_RECOMMENDER_SERVICE	S	2009/11/18	✓	C

Figure 12: BX\_RECOMMENDER\_SERVICE Target Row Example (SFX V4)

#	Target	Threshold
1	BX_RECOMMENDER_SERVICE	S

Figure 13: BX\_RECOMMENDER\_SERVICE Target Row Example (SFX V3)

The List of Target Services for the BX\_RECOMMENDER\_SERVICE displays.

- 2 Click the checkmark (N for SFX 3) in the Active column of the bX target row to turn on activation. See **Figure 14 (Figure 15)**.

72	BX_RECOMMENDER_SERVICE	S	2009/11/18	✓
----	------------------------	---	------------	---

Figure 14: Active BX\_RECOMMENDER\_SERVICE Target with Inactive Checkmark (SFX V4)

#	Service	Parser	Threshold	Modified	Active	Action
1	getRecommendation bX:bXRecommendations \$obj->plugin('bXDodLookup')			2009/04/23	N	C

Figure 15: Active BX\_RECOMMENDER\_SERVICE Target with Inactive Checkmark (SFX V3)

The inactive checkmark changes to display as an active checkmark (N changes to Y for SFX 3) to indicate that the service is active. See [Figure 16](#) ([Figure 17](#)).

<input type="checkbox"/>	72	E	V	BX_RECOMMENDER_SERVICE	S	2009/11/18	Y
--------------------------	----	---	---	------------------------	---	------------	---

Figure 16: Activated BX\_RECOMMENDER\_SERVICE Target with Active Checkmark (SFX V4)

#	Service	Parser	Threshold	Modified	Active	Action
1	getRecommendation bX:bXRecommendations \$obj->plugin('bXDodLookup')			2009/04/23	Y	

Figure 17: Activated BX\_RECOMMENDER\_SERVICE Target with Active Checkmark (SFX V3)

### 3 Verify the accuracy of your activation selection with the following test:

Send <http://<sfurl>:<port>/<instance>?rft.genre=article&rft.issn=0092-5853&rft.spage=344&rft.atitle=Candidate and Party Strategies in Two-Stage Elections Beginning with a Primary&rft.jtitle=American journal of political science&rft.volume=52&rft.issue=2&rft.date=2008-03-31> to your SFX instance to test the activated BX\_RECOMMENDER\_SERVICE target.

With this test, the BX\_RECOMMENDER\_SERVICE target should display.

## SFX Menu Customization

Libraries that have performed customization on the SFX menu template files (either simplified or advanced) should check the display of the bX target to confirm that it displays properly. The symbolic links should be reset if the link from the local instance to the global instance is broken during customization. Alternatively, if the link is broken, add the changes identified in [Advanced Menu Template Changes](#) on page 20 and [Simplified Menu Template Changes](#) on page 24 to the local files.

### Advanced Menu Template Changes

Use the advanced menu template changes for broken symbolic links. Also, see [Simplified Menu Template Changes](#) on page 24.

## ***grouping\_no.tmpl, grouping\_no.tmpl.du, and grouping\_no.tmpl.sp Files***

SFX 4 files:

```
/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/sfxmenu/
grouping_no.tmpl

/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/sfxmenu/
grouping_no.tmpl.du

/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/sfxmenu/
grouping_no.tmpl.sp
```

SFX 3 files:

```
/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/sfxmenu/
grouping_no.tmpl

/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/sfxmenu/
grouping_no.tmpl.du

/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/sfxmenu/
grouping_no.tmpl.sp
```

After:

```
<TMPL_LOOP BASIC_TARGET_LIST>
  <TMPL_INCLUDE target_list.tmpl>
</TMPL_LOOP>
```

Add:

```
<TMPL_IF BX_AFTER_BASIC><TMPL_VAR RECOMMENDATIONS_HTML></TMPL_IF>
```

After:

```
<TMPL_INCLUDE target_list.tmpl>
</TMPL_LOOP>
```

Add:

```
<TMPL_IF BX_AFTER_ADVANCED><TMPL_VAR RECOMMENDATIONS_HTML></
TMPL_IF>
```

## **grouping\_yes.tmpl, grouping\_yes.tmpl.du, and grouping\_yes.tmpl.sp Files**

SFX 4 files:

```
/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/sfxmenu/  
grouping_yes.tmpl  
  
/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/sfxmenu/  
grouping_yes.tmpl.du  
  
/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/sfxmenu/  
grouping_yes.tmpl.sp
```

SFX 3 files:

```
/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/sfxmenu/  
grouping_yes.tmpl  
  
/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/sfxmenu/  
grouping_yes.tmpl.du  
  
/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/sfxmenu/  
grouping_yes.tmpl.sp
```

Find lines:

```
</TMPL_IF>  
  
<TMPL_IF ADVANCED_TARGET_LIST>  
    <TR id="advanced_target_list_container">
```

Replace with:

```
</TMPL_IF>  
  
<TMPL_IF BX_AFTER_BASIC><TR><TD style="height:1px"><TMPL_VAR  
RECOMMENDATIONS_HTML></TD></TR></TMPL_IF>  
  
<TMPL_IF ADVANCED_TARGET_LIST>  
    <TR id="advanced_target_list_container">
```

Find lines:

```
</TR>  
  
</TMPL_IF>  
  
</TABLE>
```

Replace with:

```
</TR>

  </TMPL_IF>

  <TMPL_IF BX_AFTER_ADVANCED><TR><TD style="height:1px"><TMPL_VAR
RECOMMENDATIONS_HTML></TD></TR></TMPL_IF>

</TABLE>
```

### ***sfxmenu.tpl, sfxmenu.tpl.du, and sfxmenu.tpl.sp Files***

SFX 4 files:

```
/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/sfxmenu/
sfxmenu.tpl

/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/sfxmenu/
sfxmenu.tpl.du

/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/sfxmenu/
sfxmenu.tpl.sp
```

SFX 3 files:

```
/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/sfxmenu/
sfxmenu.tpl

/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/sfxmenu/
sfxmenu.tpl.du

/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/sfxmenu/
sfxmenu.tpl.sp
```

Find lines:

```
<LINK REL="stylesheet" TYPE="text/css" href="<TMPL_VAR
NAME='BASE'>/<TMPL_VAR NAME='INSTANCE' ESCAPE='HTML'>/css/public/
style.css">

<SCRIPT type="text/javascript" LANGUAGE="JavaScript"
src="<TMPL_VAR NAME='BASE'>/<TMPL_VAR NAME='INSTANCE'
ESCAPE='HTML'>/js/sfxmenu/main.js"></SCRIPT>
```

Replace with:

```
<LINK REL="stylesheet" TYPE="text/css" href="<TMPL_VAR
NAME='BASE'>/<TMPL_VAR NAME='INSTANCE' ESCAPE='HTML'>/css/public/
style.css">
```

```
<LINK REL="stylesheet" TYPE="text/css" href="<TMPL_VAR  
NAME='BASE'>/<TMPL_VAR NAME='INSTANCE' ESCAPE='HTML'>/css/bx/  
bx.css">  
  
<SCRIPT type="text/javascript" LANGUAGE="JavaScript"  
src="<TMPL_VAR NAME='BASE'>/<TMPL_VAR NAME='INSTANCE'  
ESCAPE='HTML'>/js/sfxmenu/main.js"></SCRIPT>
```

### **style.css File**

SFX 4 file:

```
/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/css/public/  
style.css
```

SFX 3 file:

```
/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/css/  
public/style.css
```

Find lines:

```
.PopupPage {BACKGROUND:#F1F1F1;  
  
    PADDING:10PX;  
  
    PADDING: 2px 2px 5px 20px;  
  
    BORDER: #B5B6B5 2px solid;  
  
    margin: 0;  
  
}
```

Any lines which may remain below these lines should be removed. Such lines would all have recommendations- as part of the name.

---

#### **NOTE:**

Versions of this file published later may not have these lines.

---

### **Simplified Menu Template Changes**

Use the simplified menu template changes for broken symbolic links. Also, see [Advanced Menu Template Changes](#) on page 20.



**grouping\_yes.tpl File**

SFX 4 file:

```
/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/
simplified_templat1/grouping_yes.tpl
```

SFX 3 file:

```
/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/
simplified_templat1/grouping_yes.tpl
```

Find lines:

```
</TMPL_IF>

<TMPL_IF ADVANCED_TARGET_LIST>

<TMPL_IF COLLAPSIBLE_ENABLED>
```

Replace with:

```
</TMPL_IF>

<TMPL_IF BX_AFTER_BASIC><TR><TD style="height:1px"><TMPL_VAR
RECOMMENDATIONS_HTML></TD></TR></TMPL_IF>

<TMPL_IF ADVANCED_TARGET_LIST>

<TMPL_IF COLLAPSIBLE_ENABLED>
```

Find lines

```
</TR>

</TMPL_IF>

</TABLE>
```

Replace with:

```
</TR>

</TMPL_IF>

<TMPL_IF BX_AFTER_ADVANCED><TR><TD style="height:1px"><TMPL_VAR
RECOMMENDATIONS_HTML></TD></TR></TMPL_IF>

</TABLE>
```

## ***sfxmenu.tpl File***

SFX 4 file:

```
/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/  
simplified_templatel/sfxmenu.tpl
```

SFX 3 file:

```
/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/  
simplified_templatel/sfxmenu.tpl
```

Find lines:

```
<!-- <TMPL_VAR NAME='CTX_OBJECT'> //-->  
  
<link href="/<TMPL_VAR NAME='INSTANCE' ESCAPE='HTML'>/css/<TMPL_VAR  
TEMPLATE_PATH_ROOT>/sfxmenu.css" rel="stylesheet" type="text/css">
```

Replace with:

```
<!-- <TMPL_VAR NAME='CTX_OBJECT'> //-->  
  
<link href="/<TMPL_VAR NAME='INSTANCE' ESCAPE='HTML'>/css/<TMPL_VAR  
TEMPLATE_PATH_ROOT>/sfxmenu.css" rel="stylesheet" type="text/css">  
  
    <LINK REL="stylesheet" TYPE="text/css" href="<TMPL_VAR  
NAME='BASE'>/<TMPL_VAR NAME='INSTANCE' ESCAPE='HTML'>/css/bx/  
bx.css">
```

## ***sfxmenu.css File***

SFX 4 file:

```
/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/css/  
simplified_templatel/sfxmenu.css
```

SFX 3 file:

```
/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/css/  
simplified_templatel/sfxmenu.css
```

Find lines:

```
.popBottom_left div.alignLeft div.text {height:18px; float:left;
padding-top:4px; padding-left:4px;}

.popBottom_left div.alignLeft div.text A:link,
A:visited{color:#990000}
```

Any lines which may remain below these lines should be removed. Such lines would all have recommendations- as part of the name.

---

**NOTE:**

Versions of this file published later may not have these lines.

---

### **getRecommendation.tpl File**

SFX 4 file:

```
/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/
simplified_template1/services/getRecommendation.tpl
```

SFX 3 file:

```
/exlibris/sfx_ver/sfx_version_3/<instance_name>/templates/
simplified_template1/services/getRecommendation.tpl
```

If the symbolic link has been broken for this file in the local instance, the local file should be moved and/or removed and copied again from the sfxglb41 (sfxglb3 for SFX 3) instance.

Recustomization should be performed due to significant changes to this file.

## **Testing Your Changes/Customization**

Verify the display of the bX service with the test below.

Send the following to your SFX instance to test the activated BX\_RECOMMENDER\_SERVICE target:

```
<sfxurl>:<port>/
<instance>?rft.genre=article&rft.issn=00925853&rft.spage=344&rft.at
itle=Candidate and Party Strategies in Two-Stage Elections Beginning
with a Primary&rft.jtitle=American journal of political
science&rft.volume=52&rft.issue=2&rft.date=2008-03-31
```

With this test OpenURL, the BX\_RECOMMENDER\_SERVICE target should display. In case the option to show full text indication is turned on, check to

make sure that a full text indicator is shown for recommendations where full text is available.

---

**NOTE:**

This only works if the RSI index is up to date.

---

# 5

---

## Configuration for bX Recommendations

This section includes:

- [Overview](#) on page 29
- [bx.config](#) on page 31

### Overview

To configure bX for recommendations, the following components need to be considered:

- Settings that determine when bX recommendations display.
- Settings that identify the display characteristics of bX recommendations.

---

**NOTE:**

Recommendation configuration options must be completed by both bX subscribers and contributors.

---

See [Figure 18](#) for an example of the display results when these settings are implemented.

The screenshot displays the ExLibris SFX interface. At the top left is the ExLibris logo with the tagline "The bridge to knowledge". Below the logo is the "ExLibris SFX" text. On the top right, there is a language dropdown menu set to "English". The main content area shows the following details:

**Title:** Relationship Formation on the Internet: What's the Big Attraction?  
**Source:** The Journal of social issues [0022-4537] vol:58 iss:1 pg:9

Below the details are two links with icons:

- Full text available via ProQuest Platinum Database
- Holdings in Ex Libris ALEPH catalog

A section titled "Users interested in this article also expressed an interest in the following:" contains a list of three related articles, each with a checkbox and a circular icon:

1. Bargh, John A. Can you see the real me? Activation and expression of the "true self" on the Internet. The Journal of social issues. 58.1 (2002): 33-48.
2. Belsie, Laurent. Can folks virtually find their valentine on-line? The Christian Science monitor. 89.56 (1997): 3-.
3. Yurchisin, Jennifer. AN EXPLORATION OF IDENTITY RE-CREATION IN THE CONTEXT OF INTERNET DATING. Social behavior and personality. 33.8 (2005): 735-750.

At the bottom of this section are links for "View More...", "Select All", "Clear All", "Save Citations", and a "Select Format" dropdown menu. The "bx BETA" logo is visible in the top right corner of this section. A "More Options" dropdown arrow is located at the bottom right of the interface.

Figure 18: Example of Settings

## bx.config

All of the bX/SFX integration configuration settings are specified through the `bx.config` file. See [Figure 19](#) for an example of the file.

```
Section "bx_main"
    BX_OAI_REPO_LOG           "logs/oai_repo.log"
    BX_PUBLISHING_LOG        "logs/oai_publish.log"
    BX_ADMIN_EMAIL           ""
    BX_RECOMMENDATIONS_LOG   "logs/recommendations.log"
    BX_LOG_LEVEL              "DEBUG"
EndSection

Section "oai"
    BX_OAI_MAX_RECORDS       "10000"
EndSection

Section "thresholds"
    minimal_rank_recommendation    "0"
    maximum_records_to_retrieve    "20"
    recommendations_source          "global"
    plugin_timeout_seconds          "10"
    full_text_recommendation_only   "0"
EndSection

Section "sfxmenu"
    initial_recommendations_list    "3"
    extended_recommendations_list   "10"
    show_full_text_indication        "1"
    show_full_text_button            "0"
    full_text_indicator_picture       "bx/bx_icon_full_text.png"
    full_text_button_refreshes_same_window "0"
    show_sfx_button                  "1"
    sfx_button_picture               "bx/bx_icon_sfx.png"
    sfx_button_refreshes_same_window "0"
    logo_image                       "bx/bx_logo.png"
#values: BASIC | ADVANCED
```

```
bx_location "BASIC"
EndSection

Section "citation_export_formats"
    refworks "1"
    endnote "1"
    procite "1"
    refman "1"
    metalib-e-shelf "0"
EndSection

Section "citation_manager_name_map"
    refworks_display "RefWorks"
    endnote_display "EndNote"
    procite_display "ProCite"
```

Figure 19: Example of bx.config File

The bX configuration file is part of your SFX instance and located in `/exlibris/sfx_ver/sfx4_1/<sfx_instance>/config` (`/exlibris/sfx_ver/sfx_version_3/<sfx_instance>/config` for SFX 3). The `bx.config` file has the following components for bX recommendations:

- Thresholds
- SFX Menu
- Citation Export Formats
- Citation Manager Name Map

For configuration instructions, see [Thresholds](#) on page 32, [SFX Menu](#) on page 35, [Citation Export Formats](#) on page 39, and [Citation Manager Name Map](#) on page 41.

---

**NOTE:**

Configuration instructions for `bx_main` and `oai` can be found in Chapter 4, [Configuration for bX Publishing](#).

---

## Thresholds

At least one bX recommendation must be available in order for the [Get Recommendations for this Article](#) link to display in the SFX menu.



Parameters set in the Thresholds component of the `bx.config` file determine when a bX recommendation displays. See **Table 1** for a list of these parameters and the values for each one.

Table 1. `bx.config` Thresholds Options

Parameter	Value
<code>minimal_rank_recommendation</code>	<p>0 to 100</p> <p>Use this parameter to set a percentage (%) value to indicate the minimal acceptable ranking for a recommendation.</p> <p>A minimal ranking of 60% means that the bX recommendation is to display if at least one recommendation has a ranking of 60%.</p>
<code>maximum_records_to_retrieve</code>	<p>1 to 30</p> <p>20 is the default.</p> <p>Use this parameter to identify how many records are to be retrieved from the bX service.</p> <p>For better performance, it is recommended that this value not be set higher than 30.</p> <hr/> <p><b>NOTE:</b></p> <p>Recommendation records are retrieved in order for them to be displayed in the SFX menu and the bX target window. See <b>SFX Menu</b> on page 35 for the configuration file options to display these records.</p> <hr/>

Table 1. bx.config Thresholds Options

Parameter	Value
recommendations_source	<p>global, local</p> <p>global is the default.</p> <hr/> <p><b>NOTE:</b> Only the global option is currently supported.</p> <hr/> <p>This parameter determines what default is selected by the bX recommendation source.</p> <p>The source identifies the institution from which recommendations are supplied.</p>
plugin_timeout_seconds	<p>1 to 10</p> <p>10 is the default.</p> <p>Use this parameter to specify the number of seconds within which a response is expected from bX.</p> <p>The recommended value is 10.</p>

Table 1. bx.config Thresholds Options

Parameter	Value
full_text_recommendation_only	<p>0, 1</p> <p>0 is the default.</p> <p>Set this parameter to 1 to indicate that, at least, one recommendation has, at least, one active full-text service.</p> <hr/> <p><b>NOTE:</b></p> <p>When this parameter is set to 1, the opportunity for getting recommendations is reduced. Recommendations are shown only when your institution provides full text of the recommended article. For recommendations to show, the SFX menu options <code>show_full_text_indication</code> or <code>show_full_text_button</code> (as described in <a href="#">Table 2</a> starting on page 36) should also be set to 1.</p> <hr/> <p>For the full-text check, SFX relies on the activation data in the Rapid Service Indicator (RSI) index. Information on configuring and building these indexes can be found in the <i>SFX System Administration Guide</i>.</p>

## SFX Menu

Parameters set in the SFX Menu component of the `bx.config` file determine how bX recommendations display in the SFX menu. See [Table 2](#) for a list of the parameters that can be set and the values for each one. See [Figure 20](#) for an example of an SFX menu page display.

Table 2. bx.config SFX Menu Options

Parameter	Value
initial_recommendations_list	<p>1 to 5</p> <p>3 is the default setting.</p> <p>Use this parameter to identify the number of recommendations shown on the initial SFX short recommendation menu (before one clicks the link to view more recommendations).</p>
extended_recommendations_list	<p>4 to 20</p> <p>10 is the default setting.</p> <p>Use this parameter to specify the number of recommendations shown in total when the user clicks the link to view more recommendations.</p>
show_full_text_indication	<p>0, 1</p> <p>1 is the default.</p> <p>0=do not show full text indication.</p> <p>1=show full text indication.</p> <p>Use this parameter to display full-text indication by hyperlinking the article or book title directly to the full-text link.</p> <p>Full-text indication displays when SFX finds that, at least, one active full-text service exists for the bX recommendation.</p> <p>For the full-text check, SFX relies on the activation data in the Rapid Service Indicator (RSI) index. Information on configuring and building these indexes can be found in the <i>SFX System Administration Guide</i>.</p>

Table 2. bx.config SFX Menu Options



Parameter	Value
show_full_text_button	<p>0, 1</p> <p>0 is the default.</p> <p>0=do not show the Full Text button.</p> <p>1=show the Full Text button.</p> <p>Use this parameter to display a Full Text button (see full_text_indicator_picture). This button may be used in addition to the title hyperlink.</p> <p>See <a href="#">Figure 20</a> for a display example.</p>
full_text_indicator_picture	<p>bx/bx_icon_full_text.png is the default.</p> <p>Use this parameter to specify the path to the image used for the Full Text button (see below).</p> 
full_text_button_refreshes_same_window	<p>0, 1</p> <p>0 is the default.</p> <p>0=Open new window to display page when Full Text indicator button is clicked.</p> <p>1=Open page in the same window when the Full Text indicator button is clicked.</p>
show_sfx_button	<p>0, 1</p> <p>1 is the default.</p> <p>0=do not show SFX button.</p> <p>1=show SFX button.</p> <p>Use this parameter to specify whether to display the SFX button for the bX recommendations in the SFX menu.</p> <p>See <a href="#">Figure 20</a> for a display example.</p>

Table 2. bx.config SFX Menu Options

Parameter	Value
sfx_button_picture	<p>bx/bx_icon_sfx.png is the default.</p> <p>Use this parameter to specify the path to the image used for the SFX button (see below).</p> 
sfx_button_refreshes_same_window	<p>0, 1</p> <p>0 is the default.</p> <p>0=Open new window to display page when SFX button is clicked.</p> <p>1=Open page in the same window when the SFX button is clicked.</p>
logo_image	<p>bx/bx_logo.png is the default.</p> <p>This parameter identifies the path for the logo image.</p>
bx_location	<p>BASIC, ADVANCED</p> <p>BASIC is the default.</p> <p>Use this parameter to identify where the bX section is to display, either at the end of the Basic or Advanced SFX menu section. This is connected to a configuration option in the SFX menu, <b>Collapsible menu</b>, where SFX services are either part of the basic set of services (shown initially) or the advanced set (initially hidden but viewable by clicking the Advanced tab).</p>

The screenshot shows the ExLibris SFX interface. At the top, the ExLibris logo is followed by the tagline "The bridge to knowledge". Below this, the "ExLibris SFX" logo is visible on the left, and a language dropdown menu is set to "English" on the right. The main content area displays the following information:

**Title:** Relationship Formation on the Internet: What's the Big Attraction?  
**Source:** The Journal of social issues [0022-4537] vol:58 iss:1 pg:9

Below the citation, there are two buttons: "Full text available via ProQuest Platinum Database" and "Holdings in Ex Libris ALEPH catalog".

The central part of the interface features a section titled "Users interested in this article also expressed an interest in the following:" with a "bx BETA" logo in the top right corner. This section contains a list of 10 related articles, each with a checkbox on the left and a circular icon on the right. The articles are:

1. Bargh, John A. Can you see the real me? Activation and expression of the "true self" on the Internet. The Journal of social issues. 58.1 (2002): 33-48.
2. Belsie, Laurent. Can folks virtually find their valentine on-line? The Christian Science monitor. 89.56 (1997): 3-
3. Yurchisin, Jennifer. AN EXPLORATION OF IDENTITY RE-CREATION IN THE CONTEXT OF INTERNET DATING. Social behavior and personality. 33.8 (2005): 735-750.
4. Parks, Malcolm R. Making friends in cyberspace. Journal of communication. 46.1 (1996): 80-97.
5. Scott, Veronica M. [Does Virtual Intimacy Exist? A Brief Exploration into Reported Levels of Intimacy in Online Relationships](#). Cyberpsychology & behavior. 9.6 (2006): 759-761.
6. Cornwell, B.. Love on the Internet: involvement and misrepresentation in romantic relationships in cyberspace vs. realspace. Computers in human behavior. 17.2 (2001): 197-211.
7. Peter, Jochen. [Developing a model of adolescent friendship formation on the Internet](#). Cyberpsychology & behavior. 8.5 (2005): 423-430.
8. McKenna, Katelyn A. Causes and consequences of social interaction on the Internet: A conceptual framework. Media psychology. 1.3 (1999): 249-269.
9. Ellison, Nicole. Managing Impressions Online: Self-Presentation Processes in the Online Dating Environment. Journal of computer-mediated communication. 11.2 (2006): 415-441.
10. Kraut, Robert. Internet Paradox Revisited. The Journal of social issues. 58.1 (2002): 49-74.

At the bottom of this list, there are links for "View Less...", "Select All", "Clear All", "Save Citations", and a "Select Format" dropdown menu. A "More Options" button is located at the bottom right of the interface.

Figure 20: SFX Display Options - Full Text and SFX Buttons

## Citation Export Formats

Parameters set in the Citation Export Formats component of the `bx.config` file determine the ability to export to external systems. See [Table 3](#) for a list of the parameters that can be set and the values for each one.

Table 3. `bx.config` Citation Export Formats Options

Parameter	Value
refworks	0, 1 1 is the default. 0=No. 1=Yes. Use this parameter to specify Yes or No to indicate the ability to export to the RefWorks external system.

Table 3. bx.config Citation Export Formats Options

Parameter	Value
endnote	<p>0, 1</p> <p>1 is the default.</p> <p>0=No.</p> <p>1=Yes.</p> <p>Use this parameter to specify Yes or No to indicate the ability to export to the EndNote external system.</p>
procite	<p>0, 1</p> <p>1 is the default.</p> <p>0=No.</p> <p>1=Yes.</p> <p>Use this parameter to specify Yes or No to indicate the ability to export to the ProCite external system.</p>
refman	<p>0, 1</p> <p>1 is the default.</p> <p>0=No.</p> <p>1=Yes.</p> <p>Use this parameter to specify Yes or No to indicate the ability to export to the Reference Manager external system.</p>
metalib-e-shelf	<p>0, 1</p> <p>0 is the default.</p> <p>0=No.</p> <p>1=Yes.</p> <p>Use this parameter to specify Yes or No to indicate the ability to export to the Metalib E-Shelf external system.</p> <hr/> <p><b>NOTE:</b> This download option is not yet supported.</p> <hr/>



## Citation Manager Name Map

Parameters set in the Citation Manager Name Map component of the `bx.config` file identify the names that display in a drop-down list of external systems when export has been set to `Yes` (see [Citation Export Formats](#) on page 39). See [Table 4](#) for a list of the parameters that can be set and the values for each one.

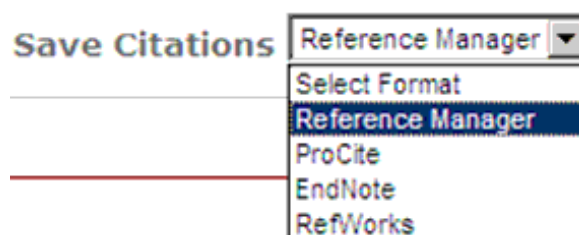


Figure 21: Citation Manager Name Map Drop-Down List

Table 4. `bx.config` Citation Manager Name Map Options

Parameter	Value
<code>refworks_display</code>	RefWorks is the default. Use this parameter to identify the name that displays in the drop-down list (see <a href="#">Figure 21</a> ) when <code>refworks</code> is set to <code>Yes</code> (1) in the <code>citation_export_formats</code> section of the <code>bx.config</code> file.
<code>endnote_display</code>	EndNote is the default. Use this parameter to identify the name that displays in the drop-down list (see <a href="#">Figure 21</a> ) when <code>endnote</code> is set to <code>Yes</code> (1) in the <code>citation_export_formats</code> section of the <code>bx.config</code> file.
<code>procite_display</code>	ProCite is the default. Use this parameter to identify the name that displays in the drop-down list (see <a href="#">Figure 21</a> ) when <code>procite</code> is set to <code>Yes</code> (1) in the <code>citation_export_formats</code> section of the <code>bx.config</code> file.

Table 4. bx.config Citation Manager Name Map Options

Parameter	Value
refman_display	<p>Reference Manager (optional)</p> <p>Use this parameter to identify the name that displays in the drop-down list (see <b>Figure 21</b>) when <code>refman</code> is set to Yes (1) in the <code>citation_export_formats</code> section of the <code>bx.config</code> file.</p>
metalib-e-shelf_display	<p>Metalib E-Shelf (optional)</p> <p>Use this parameter to identify the name that displays in the drop-down list (see <b>Figure 21</b>) when <code>metalib-e-shelf</code> is set to Yes (1) in the <code>citation_export_formats</code> section of the <code>bx.config</code> file.</p> <hr/> <p><b>NOTE:</b> This download option is not yet supported.</p> <hr/>

# 6

---

## Configuration for bX Publishing

This section includes:

- [Overview](#) on page 43
- [Preparing to Publish](#) on page 44
- [Publishing](#) on page 49

### Overview

If you have chosen to become a contributor to bX, you add your local usage data to the main bX database that helps to create a richer recommendation database for all customers. Since you are contributing your own data, you are able to retrieve recommendations for your users based on your own institutional usage data (local recommendations) as well as global recommendations. Subscriber-only users view global recommendations.

Your contribution to bX is the SFX usage logs that are generated each time a patron accesses the SFX menu. The logs are stored in the following places:

- Online tables in MySQL
- Offline tables in MySQL
- Exported archive files

In order to contribute these logs to bX, you must publish them to a new MySQL table, OAI\_REPOSITORY. Subsequently, bX harvests the published records using an OAI-PMH query.

Since all of your SFX logs are stored in the OAI\_REPOSITORY table, you need to consider your MySQL database space carefully before deciding to enable publishing. See [Analyze SFX Server Disk Space Required to Publish Historical Statistics Data](#) on page 44 for more details.

## Preparing to Publish

In preparation to publish, you need to complete the following:

- Analyze MySQL database space. See [Analyze SFX Server Disk Space Required to Publish Historical Statistics Data](#) on page 44
- Configure `bx.config`. See [Configure `bx.config`](#) on page 45
- Configure firewalls (if required). See [Configure Firewalls \(If Required\)](#) on page 48.

### Analyze SFX Server Disk Space Required to Publish Historical Statistics Data

The initial publishing of SFX logs for contribution to bX should contain all historical statistics, including logs in the following:

- STAT\_OBJECT
- STAT\_OBJECT\_OFFLINE
- Archive files

Since many SFX system administrators move logs to archive files often due to lack of adequate database space, you may need to add more space before publishing the SFX logs. There should be enough room in the `/exlibris` file system to accommodate an `OAI_REPOSITORY` table that contains duplicates of all the logs from `STAT_OBJECT`, `STAT_OBJECT_OFFLINE`, and archive files.

---

#### NOTE:

- For a 100 MB archive file in `.saf` format, about 100MB of extra disk space is required after it is loaded into the `OAI_REPOSITORY` table.
  - When using the Server Admin Utility to publish all offline statistics and archived files, the estimated disk space required, the currently available disk space, and the estimated remaining disk space after publishing are displayed. For more information, see [Publishing](#) on page 49.
- 

Once the published logs have been harvested by bX, you can remove the harvested `OAI_REPOSITORY` records from the table. See [Cleanup](#) on page 52 for more information.

## Configure bx.config

All of the bX/SFX integration configuration settings are specified through the `bx.config` file. See [Figure 22](#) for an example of the file.

```
Section "bx_main"

    BX_OAI_REPO_LOG           "logs/oai_repo.log"

    BX_PUBLISHING_LOG         "logs/oai_publish.log"

    BX_ADMIN_EMAIL            ""

    BX_RECOMMENDATIONS_LOG    "logs/recommendations.log"

    BX_LOG_LEVEL              "DEBUG"

EndSection

Section "oai"

    BX_OAI_MAX_RECORDS       "10000"

EndSection

Section "thresholds"

    minimal_rank_recommendation    "0"

    maximum_records_to_retrieve    "20"

    recommendations_source          "global"

    plugin_timeout_seconds          "10"

    full_text_recommendation_only   "0"

EndSection

Section "sfxmenu"

    initial_recommendations_list    "3"

    extended_recommendations_list   "10"

    show_full_text_indication       "1"

    show_full_text_button           "0"

    full_text_indicator_picture      "bx/bx_icon_full_text.png"

    full_text_button_refreshes_same_window "0"

    show_sfx_button                  "1"

    sfx_button_picture              "bx/bx_icon_sfx.png"

    sfx_button_refreshes_same_window "0"

    logo_image                       "bx/bx_logo.png"

    #values: BASIC | ADVANCED

    bx_location                      "BASIC"

EndSection
```

```
EndSection

Section "citation_export_formats"
    refworks                "1"
    endnote                 "1"
    procite                 "1"
    refman                  "1"
    metalib-e-shelf        "0"
EndSection

Section "citation_manager_name_map"
    refworks_display       "RefWorks"
    endnote_display        "EndNote"
    procite_display         "ProCite"
```

Figure 22: Example of bx.config File

The bX configuration file is part of your SFX instance and located in `/exlibris/sfx_ver/sfx4_1/<sfx_instance>/config`. (`/exlibris/sfx_ver/sfx_version_3/<sfx_instance>/config` for SFX 3). The `bx.config` file has the following publishing configuration components:

- Main
- OAI

For configuration details, see [bx.config Main Options](#) on page 47 and [bx.config OAI Options](#) on page 48. In general, no changes or edits need to be made to this file except for the addition of a local e-mail address.

---

**NOTE:**

Configuration instructions for `thresholds`, `sfxmenu`, `citation_export_formats`, and `citation_manager_name_map` can be found in Chapter 3, [Configuration for bX Recommendations](#) on page 29.

---

Table 5. bx.config Main Options

Parameter	Value
BX_OAI_REPO_LOG	<p>Use this parameter to specify the name and path of the log.</p> <p>For example:</p> <pre>logs/oai_repo.log</pre> <p>The log specified with this parameter shows the status of the bX harvesting from OAI_REPOSITORY.</p> <p>After records are published into the OAI_REPOSITORY, bX harvests the records.</p>
BX_PUBLISHING_LOG	<p>Use this parameter to specify the name and path of the log.</p> <p>For example:</p> <pre>logs/oai_publish.log</pre> <p>This log shows publishing progress and errors if any occur.</p> <p>Records are taken from STAT_OBJECT, STAT_OBJECT_OFFLINE, and archive files, and published into OAI_REPOSITORY.</p>
BX_LOCAL_RECOMMENDATIONS_URL	<p>Use this parameter to specify the URL to be used to display an SFX menu for recommendations found, such as when you see a list of recommendations, and you want to see an SFX menu for one of them.</p> <p>A blank value for this parameter specifies that the URL of the local SFX server is to be used.</p>
BX_ADMIN_EMAIL	<p>Use this parameter to specify the e-mail address of the person who should receive error e-mails.</p> <p>If a value of blank is specified, the SFX admin e-mail is used.</p>

Table 5. bx.config Main Options

Parameter	Value
BX_RECOMMENDATIONS_LOG	Use this parameter to specify the name and path of the log.  For example: <code>logs/recommendations.log</code>  This log shows the success or failure of each attempt to get recommendations from the bX recommendation server.
BX_LOG_LEVEL	Debug=Show verbose messages in the <code>oai_repo.log</code> , <code>oai_publish.log</code> , and <code>recommendations.log</code> .  Blank=Not in debug mode.

Table 6. bx.config OAI Options

Parameter	Value
BX_OAI_MAX_RECORDS	10000 is the default.  Use this parameter to define the maximum number of records that are returned to the bX harvester for an OAI request.  Any change to this value needs to come by recommendation of an Ex Libris staff person.

## Configure Firewalls (If Required)

In order for bX to be able to harvest the published logs from SFX for contributors/publishers, the bX harvesting machine, [bx1.hosted.exlibrisgroup.com](http://bx1.hosted.exlibrisgroup.com), makes a request to your SFX server on <http://<server>:<port>/oai/<instance>>.

Apache is currently set up to only allow requests on this OAI URL from a machine coming from the [hosted.exlibrisgroup.com](http://hosted.exlibrisgroup.com) domain. If your institution has strict firewall settings, you may need to have your firewall opened to accommodate the Apache restrictions.



## Publishing

Publishing is a two-step process:

- 1 Enable publishing from the SFX Admin Center menu. See **Enable Publishing from the SFX Admin Center Menu** on page 49.
- 2 Begin Publishing. See **Begin Publishing** on page 50.

### Enable Publishing from the SFX Admin Center Menu

Publishing is enabled from the **SFX Admin Center > bX Configuration** section. To enable publishing, select the **Publishing** checkbox and click **Save** (see **Figure 23**).

After publishing is enabled, you can do the following:

- Publish all historical statistics from offline and archive files
- Publish online statistics on an ongoing basis.

If publishing is enabled (see **Figure 23/Figure 24**), the logs are automatically published to the OAI\_REPOSITORY table when they are moved from online logs to offline.

After publishing is enabled, an automated e-mail is sent to [bx\\_info@exlibrisgroup.com](mailto:bx_info@exlibrisgroup.com) <[mailto:bx\\_info@exlibrisgroup.com](mailto:bx_info@exlibrisgroup.com)> to alert the bX team to start harvesting SFX usage data. If sending e-mails from the SFX server is not enabled, send the following information to the e-mail address above:

- SFX base-url
- bX license (optional)
- Institution name

---

**NOTE:**

It is recommended that you alert the bX team in any case when historical SFX usage statistics are published.

---

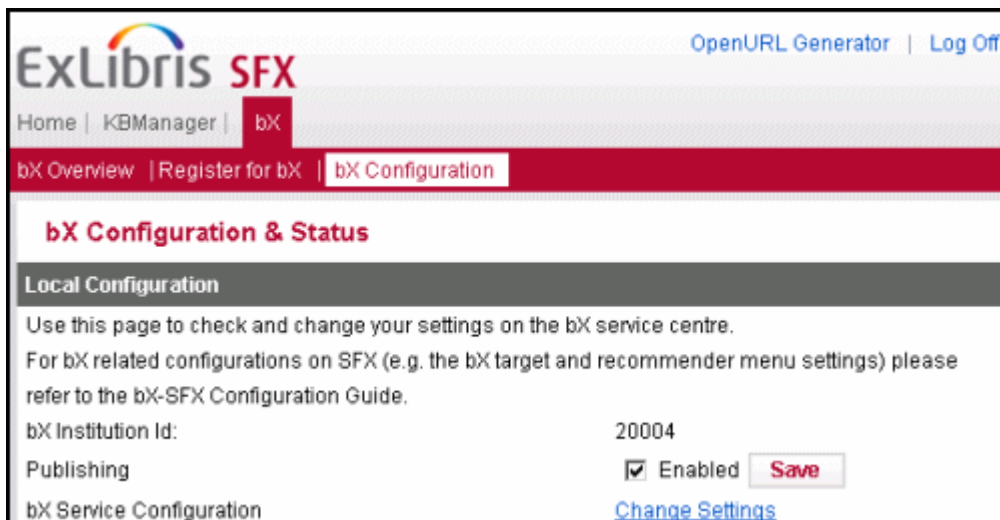


Figure 23: Example of Publishing Enabled Option (SFX V4)



Figure 24: Example of Publishing Enabled Option (SFX V3)

## Begin Publishing

Publishing is done in the following two stages:

- Historical
- Ongoing/current

**To publish historical statistics:**

- 1 From the SFX server, type `da` to access the admin directory (`/exlibris/sfx_ver/sfx4_1/<sfx_instance>/admin` or for SFX 3, `/exlibris/sfx_ver/sfx_version_3/<sfx_instance>/admin`).
- 2 Type `./server_admin_util` to access the admin utility menu (see [Figure 25](#)/[Figure 26](#)), and select **5 Statistics** (see [Figure 27](#)).

```

Main Menu
 1 Start/Stop services
 2 Filesystem maintenance
 3 Change passwords
 4 Database maintenance
 5 Statistics
 6 Diagnostics
 7 AZ Index
 8 Export GOOGLE institutional holdings file
 9 Revision update
10 Primo Export
11 build RSI index

 q Exit (Applies to all menus)
 m Main menu (Applies to all menus)
Please select [1-11,q,m]:

```

Figure 25: SFX Admin Utility Menu (SFX V4)

```

Main Menu
 1 Start/Stop services
 2 Filesystem maintenance
 3 Change passwords
 4 Database maintenance
 5 Statistics
 6 Diagnostics
 7 AZ Index
 8 AZ Index Version 3
 9 Ranking Index
10 Export GOOGLE institutional holdings file
11 Revision update
12 Journal Subscription Index
13 Primo Export
14 Verde Export
15 build RSI index

 q Exit (Applies to all menus)
 m Main menu (Applies to all menus)
Please select [1-15,q,m]: █

```

Figure 26: SFX Admin Utility Menu (SFX V3)

```
Statistics
 1 Move data from online to offline
 2 Archive statistics
 3 Load statistics from a file
 4 Show stats tables monitor information
 5 Scheduling for statistics maintenance tasks
 6 Clear SFX_REQUEST table
 7 bX Registration & Configuration
 8 Publish Historical Stats for bX
 9 Clean OAI_REPOSITORY table
Please select [1-9,q,m]: █
```

Figure 27: SFX Admin Statistics Menu (SFX V4/V3)

- 3 Select 8 to publish all offline statistics (in STAT\_OBJECT\_OFFLINE) and archived files (UNIX files stored on the server).

#### To publish ongoing/current statistics:

- 1 Repeat steps 1 and 2 from the previous procedure.
- 2 Select 1 **Move data from online to offline** (see [Figure 27](#)) from the Statistics menu.

As items are moved from online to offline after publishing has been enabled, the logs are automatically published.

## Cleanup

#### To clean up the OAI\_REPOSITORY table:

- 1 From the SFX server, type da to access the admin directory (/exlibris/sfx\_ver/sfx4\_1/<sfx\_instance>/admin or for SFX 3, /exlibris/sfx\_ver/sfx\_version\_3/<sfx\_instance>/admin).
- 2 Type ./server\_admin\_util to access the admin utility menu (see [Figure 25](#)), and select 5 **Statistics**.
- 3 Select option 9 to **Clean the OAI\_REPOSITORY table**. See [Figure 27](#).
- 4 Select from the following OAI\_REPOSITORY options to process cleanup according to your needs:
  - a 1 - **Delete all OAI\_REPOSITORY table records** (see [Option 1](#) on page 53)
  - b 2 - **Delete OAI\_REPOSITORY table records by date range** (see [Option 2](#) on page 53)
  - c 3 - **Show scheduled OAI\_REPOSITORY cleanup tasks** (see [Option 3](#) on page 53)
  - d 4 - **Schedule an OAI\_REPOSITORY cleanup task** (see [Option 4](#) on page 54)

### Option 1

Option 1 removes all OAI\_REPOSITORY table records. This option is faster than option 2 (see [Option 2](#) on page 53) and especially useful if the OAI\_REPOSITORY is very large, such as when very large sets of statistical data have been published (more than 500,000 records).

---

**NOTE:**

Before using this option, we recommend that you follow the procedure, **To publish historical statistics:** on page 51, for publishing archival statistics data.

---

Selecting option 1, for example, displays:

```
This query will erase all the records in table OAI_REPOSITORY.  
Are you sure that you want to continue? [y/n] y  
  
All records have been deleted from table OAI_REPOSITORY (1944500  
records)
```

### Option 2

Option 2 removes all OAI\_REPOSITORY table records that were published (which means included in the OAI\_REPOSITORY table) more than *X* number of days ago.

This option is slower because SFX needs to go over all the records of the OAI\_REPOSITORY table and check the DATESTAMP value. This option is recommended if the amount of published data is relatively small--not more than 500,000 records.

Selecting option 2, for example, displays:

```
This query will erase all the records from table OAI_REPOSITORY  
older than number of days given.  
  
Please enter the number of days: 30  
  
You are about to delete 25345 records  
  
Are you sure that you want to continue? [y/n] y
```

### Option 3

Option 3 allows you to view scheduled OAI\_REPOSITORY clean-up tasks and remove them if needed.

Selecting option **3**, for example, displays:

```
OAI_REPOSITORY

 1 Delete all OAI_REPOSITORY table records
 2 Delete OAI_REPOSITORY table records by date range
 3 Show scheduled OAI_REPOSITORY clean-up tasks
 4 Schedule an OAI_REPOSITORY clean-up task

Please select [1-4,q,m]: 3

OAI record deletion schedule is as follows:

[1] 00:00 of every Sunday of every month, delete all
[2] 00:00 of every Sunday of every month, delete by date
range.

Would you like to remove any of these? [y/N] y

Please enter the number of the task to remove or <ENTER> to
cancel: 1

Successfully deleted the crontab line
```

#### **Option 4**

Option **4** allows you to schedule OAI\_REPOSITORY cleanup tasks.

Selecting option **3**, for example, displays:

```
OAI_REPOSITORY

 1 Delete all OAI_REPOSITORY table records
 2 Delete OAI_REPOSITORY table records by date range
 3 Return to menu

Please select: 1

This query will erase all the records in table OAI_REPOSITORY.
Are you sure that you want to continue? [y/n] y

Please enter scheduling parameters

Time must be in the form HH:MM where

  HH can be: 00-23 for midnight-11PM or * for every hour
  MM can be: 00-59 or * for every minute

Enter the time to run [00:00]:

Would you like to schedule for a certain weekday? [Y/n] y
```

```
Please select a weekday (1-7 Sunday-Saturday respectively) [1]: 1
Successfully added the refresh task to your crontab.
```

### **Cleanup Recommendation for Ongoing Statistics Publishing**

- 1 Set up a weekly cron job to remove OAI\_REPOSITORY data published more than 90 days ago (or 30/60 days depending on how high the usage is of your SFX server)
- 2 Set up the cron job to use the following server admin utility options.
  - a 5 Statistics (see [Figure 27](#)) from the main menu of the admin utility
  - b 9 Clean OAI\_REPOSITORY table ([Figure 25](#))
  - c 2 Delete OAI\_REPOSITORY table records by date range
- 3 Do not store more than 500,000 records in the OAI\_REPOSITORY table, since this may affect SFX performance, backups, and so forth.

### **Cleanup Recommendation When Publishing SFX Archival Statistics Data of Less Than 500,000 Records**

When publishing a set of SFX archival statistics data of less than 500,000 records:

- 1 Make sure that on the day of the publishing, no online2offline process is run or scheduled to run.
- 2 Load archival statistics data using server\_admin\_util option 5 Statistics (see [Figure 27](#)) and 8 Publish Historical Stats for bX ([Figure 25](#)).
- 3 Contact the bX team at [bx\\_info@exlibrisgroup.com](mailto:bx_info@exlibrisgroup.com) to make sure harvesting is performed.
- 4 After receiving an e-mail that harvesting has been successful, use:
  - a Option 5 Statistics (see [Figure 27](#))
  - b Option 9 Clean OAI\_REPOSITORY table ([Figure 25](#))
  - c Option 2 Delete OAI\_REPOSITORY table records by date range  
where data is older than x days and x is the number of days that has passed since the archival statistics data has been published

### **Cleanup Recommendation When Publishing SFX Archival Statistics Data of More Than 500,000 Records**

When publishing a set of archival statistics data of more than 500,000 records:

- 1 Make certain that online2offline cron jobs are temporarily disabled or not scheduled to run in the next few days.
- 2 Load archival statistics data using:

- a** Option 5 **Statistics** (see **Figure 27**)
    - b** Option 8 **Publish Historical Stats for bX** (**Figure 25**)
  - 3** Contact the bX team at [bx\\_info@exlibrisgroup.com](mailto:bx_info@exlibrisgroup.com) to make sure harvesting is performed.
  - 4** After receiving the e-mail that harvesting has been successful, use:
    - a** Option 5 **Statistics** (see **Figure 27**)
    - b** Option 9 **Clean OAI\_REPOSITORY table** (**Figure 25**)
    - c** Option 1 **Delete all OAI\_REPOSITORY table records**
  - 5** Enable online2offline cron jobs.



# 7

---

## Usage Statistics

This section includes:

- [Statistical Information](#) on page 57
- [Query](#) on page 58

### Statistical Information

SFX records data regarding the usage of bX. The following information is collected:

- Frequency with which the BX\_RECOMMENDER\_SERVICE, getRecommendation service, displays in the SFX menu.

By comparing this frequency number against the total number of requests sent to the SFX instance, you are able to calculate the number of SFX requests with or without the bX service.

- Frequency with which the BX\_RECOMMENDER\_SERVICE, getRecommendation service, is selected when it is shown in the SFX menu.

This selection, recorded in SFX statistics as a clickthrough action, is counted if at least one recommendation has been selected by the user with one of the following access methods:

- SFX icon
- Article link or Full Text indicator button
- Number of bX recommendations displayed in the SFX menu that resulted in a new SFX request. This is an additional statistic, since users are able to click/select multiple recommendations in one SFX menu.

SFX is able to track this number since each OpenURL generated using the bX citation information has the OpenURL sid element `rfr_id=info:sid/www.exlibrisgroup.com:bx-menu`.

Use the **SFX Admin Center > Statistics** module to access the statistical information regarding bX usage in SFX. See [Query](#) on page 58 for more details.

## Query

See **Table 7** for a list of SFX queries to use for bX usage statistics.

Table 7. SFX Queries for bX Usage

Query	Description
2	Number of requests and clickthroughs per source This query shows the total number of requests sent to SFX using bX citation information. Additionally, the result also displays the total number of requests sent to SFX that can be used to compare with results in query 4.
4	Number of requests and clickthroughs per service type The bX getRecommendation service displays in the results list.
11	Most popular journals selected by source Select the following source: <code>info:sid/www.exlibrisgroup.com:bx-menu</code>