Introductions

• **Vlad Buldyrev** has been supporting SFX since the beginning of its lifecycle, taking the product through multiple version upgrades. He currently specializes in link resolution and delivery across SFX, Primo, Alma, and 360 link. Vlad holds an MLIS degree from Simmons College.
Objectives and Target Audience

• Brief Session Description:
  A detailed overview of implementing new SFX features introduced in the past 2 years, including a new SFX Menu sidebar, multiple-object menu templates, Localization Tool, and the Task Manager. A preview of the upcoming A-Z list UI will also be shown.

• Session Objective(s)
  • By the end of this session you will know, understand and/or be able to:
    • B – How to implement the enhancements of your choice.
    • C – Request configuration if your service level is TotalCare

• Session Target Audience:
  • New/Experienced Customers
  • SFX Hosted Direct Customers
  • TotalCare Customers (can request configuration).

Agenda

1. KB Manager Enhancements
2. SFX Admin Enhancements
3. SFX Menu Enhancements
4. New Statistics Query
5. A-Z List Enhancements
6. Next Steps, Support Resources and Survey
KB Manager Enhancements: Elsevier / Ovid Autoloaders and EBSCO API

Elsevier & Ovid Autoloaders

- Automatically update the SFX KB holdings with unique institution subscription information.
- Based on KBART files provided by the vendors
- Can be scheduled via Task Manager or server_admin_util tool
- Five new targets:
  - ELSEVIER_SCIENCE_DIRECT_AUTOLOAD_JOURNALS
  - ELSEVIER_SCIENCE_DIRECT_AUTOLOAD_BOOKS
  - OVID_JOURNALS_AT_OVID_AUTOLOAD
  - BOOKS_AT_OVID_PURCHASE_AUTOLOAD
  - BOOKS_AT_OVID_SUBSCRIPTION_AUTOLOAD
- Request institutional token from Elsevier and KBART account credentials from Ovid
**Elsevier Autoloader configuration**

- Configuration file: `/exlibris/sfx_ver/sfx4_1/<instance>/config/elsevier_sd_autoloader.config`
  - section “general” – enter email address for notifications
  - section “institutional_token” – enter token value provided by Elsevier Support
  - Enter 1 for “active” parameter
  - Run Autoloader option from server_admin_util (select 8 -> Import/Exports and then 4 - > Elsevier ScienceDirect Autoloader)

---

**Elsevier Autoloader configuration example**

```
# Configuration file: /exlibris/sfx_ver/sfx4_1/<instance>/config/elsevier_sd_autoloader.config
Section "general"
  email                   "vlad@exlibris-usa.com"
EndSection

# Default configuration (used in case there are no separate tokens)
# 'active': indicates if the process will be run through the config file
# 'token': the specific institute's token
Section "institutional_token"
  active 1
  token    "88a073ac7cc195615e37ff3f8d740adf"
EndSection
```

Schedule a cron to run Autoloader option monthly, either via server_admin_util options 8-4-3 or Task Manager
Ovid Autoloader configuration

Initial Setup is required on the Ovid side. Contact Ovid Support (support@ovid.com) and request:

• A web user account and password
• That Ovid Group for the KBART API is enabled

• Check the web username, password, and Ovid Group name received from Ovid Support via URL:
  https://charlotte.ovid.com:8443/OrionAPI/rest/Reporting/KBARTHoldings/{OvidGroup}?UserName={username}&Password={password}

• After obtaining username, password, and Ovid Group name, fill out the SFX configuration file:
  /exlibris/sfx_ver/sfx4_1/<instance>/config/ovid_autoloader.config

Ovid Autoloader configuration example

```
# general
email  "vlad@exlibris-usa.com"

# institutional authentication
active 1
username "vladimir.buldyrev@exlibrisgroup.com"
password 1234567
oid group "ex1999"
```

Username is typically an email, password is numeric, and group number alphanumeric.
# Issues with Autoloaders

- Connection failures:
  Make sure connection to the following websites is enabled on your server firewall:
  - [https://holdings.sciencedirect.com/holdings/report.url?format=KBART&_platform=SD&_site=science](https://holdings.sciencedirect.com/holdings/report.url?format=KBART&_platform=SD&_site=science)

- Multiple entries per journal in KBART file have overlapping coverage statements - this results in overly complex date thresholds when loaded into SFX KB. Contact Elsevier or Ovid when this occurs, and request that KBART file is corrected.

# EBSCO API Linking

- Introduced in 2016 after consultation with EBSCO

- XML request sent to EBSCO instead of a metadata URL

- API returns either no result, or direct article link with EBSCO article number.

- May improve some linking issues, but not metadata conflicts/mismatches

- Needs a 3-part EBSCO API_USER_ID linking parameter, provided by EBSCO
EBSCO API configuration example:

- API_USER_ID consists of 3 parts, separated by periods:
  custud.groupid.profileid

- Provided by your EBSCO Representative

Related Documentation

- [https://knowledge.exlibrisgroup.com/@api/deki/files/26602/SFX_Target_and_Alma_E-Collection_Configuration.pdf](https://knowledge.exlibrisgroup.com/@api/deki/files/26602/SFX_Target_and_Alma_E-Collection_Configuration.pdf)  
  E-Collection Configuration Guide (ELSEVIER_SD/Elsevier SD), (Configuring the Automated Localization of the Ovid Targets)

  System Administration Guide (Elsevier ScienceDirect Autoloader), (Ovid Autoloader)

  System Advanced User Guide (Plug-in Program for Ebsco)
Localization Manager

• Expanded replacement of Threshold Tool

• Compares and reports local and global information for Target Services, Object Portfolios, and Objects

• Removes or schedules removal of localizations

• Checks the syntax of local object portfolio thresholds

• The following localized fields are checked, compared, and can be removed:
  THRESHOLD, PARSER, PARSE_PARAM, DISPLAY, PROXY, TITLE, AUTHOR, LOCAL
Localization Manager – Report Example

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Status</td>
<td>Compare Field</td>
<td>Target</td>
<td>Target Service</td>
</tr>
<tr>
<td>2</td>
<td>NOT_IDENTICAL</td>
<td>THRESHOLD</td>
<td>NATURE</td>
<td>getFullText</td>
</tr>
<tr>
<td>3</td>
<td>NOT_IDENTICAL</td>
<td>THRESHOLD</td>
<td>LEXISNEXIS_ACADEMIC</td>
<td>getFullText</td>
</tr>
<tr>
<td>4</td>
<td>NOT_IDENTICAL</td>
<td>THRESHOLD</td>
<td>ACM_DIGITAL_LIBRARY</td>
<td>getFullText</td>
</tr>
<tr>
<td>5</td>
<td>NOT_IDENTICAL</td>
<td>THRESHOLD</td>
<td>ACM_DIGITAL_LAW</td>
<td>getFullText</td>
</tr>
<tr>
<td>6</td>
<td>NOT_IDENTICAL</td>
<td>THRESHOLD</td>
<td>ELSEVIER_ID_SCIENCE_DIRECT_COMPILE</td>
<td>getFullText</td>
</tr>
<tr>
<td>7</td>
<td>NOT_IDENTICAL</td>
<td>THRESHOLD</td>
<td>ELSEVIER_ID_SCIENCE_DIRECT_COMPILE</td>
<td>getFullText</td>
</tr>
<tr>
<td>8</td>
<td>NOT_IDENTICAL</td>
<td>THRESHOLD</td>
<td>MISCELLANEOUS_EJOURNALS</td>
<td>getFullText</td>
</tr>
<tr>
<td>9</td>
<td>NOT_IDENTICAL</td>
<td>THRESHOLD</td>
<td>ACTA_PRESS</td>
<td>getFullText</td>
</tr>
<tr>
<td>10</td>
<td>NOT_IDENTICAL</td>
<td>THRESHOLD</td>
<td>ACLS_HUMANITIES_EBOOK</td>
<td>getFullText</td>
</tr>
<tr>
<td>11</td>
<td>NOT_IDENTICAL</td>
<td>THRESHOLD</td>
<td>SCIENCE_ALERT_FREE</td>
<td>getFullText</td>
</tr>
<tr>
<td>12</td>
<td>NOT_IDENTICAL</td>
<td>THRESHOLD</td>
<td>ACTA_PRESS</td>
<td>getFullText</td>
</tr>
</tbody>
</table>

SFX Task Manager – Scheduled Tasks

- **Statistics** -> Queries, online2offline, offline2file
- **Cleanup** -> Logs, scratch, export, SFX_REQUEST (for individual instance only)
- **Indices** -> A-Z eJournals List, E-Book Search complete & incremental
- **Import** -> Elsevier AutoLoader
- **Export** -> Google Scholar, Primo, MarcIt
SFX Task Manager

Welcome to Task Manager

Add New Task

The following table displays your tasks which are scheduled to run on your instance. This is a list of tasks which are supported by the Task Manager:

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Type</th>
<th>Frequency</th>
<th>TL</th>
<th>Next Scheduled Run</th>
<th>Status</th>
<th>Parameters</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>A-Z for Journals</td>
<td>Indices</td>
<td>Daily</td>
<td>10:10</td>
<td>1 April, 2016 at 00:10</td>
<td>Enabled</td>
<td>View Edit</td>
<td></td>
</tr>
<tr>
<td>DPLSR DPLSR Direct autocoder</td>
<td>Import</td>
<td>Daily</td>
<td>10:00</td>
<td>1 April, 2016 at 10:09</td>
<td>Disabled</td>
<td>View Edit</td>
<td></td>
</tr>
<tr>
<td>Google Scholar export</td>
<td>Export</td>
<td>Weekly</td>
<td>17:30</td>
<td>5 April, 2016 at 07:30</td>
<td>Enabled</td>
<td>View Edit</td>
<td></td>
</tr>
<tr>
<td>MASCOT export</td>
<td>Export</td>
<td>Monthly</td>
<td>10:20</td>
<td>2 April, 2016 at 00:23</td>
<td>Enabled</td>
<td>View Edit</td>
<td></td>
</tr>
<tr>
<td>Primo export</td>
<td>Export</td>
<td>Weekly</td>
<td>10:10</td>
<td>5 April, 2016 at 10:10</td>
<td>Enabled</td>
<td>View Edit</td>
<td></td>
</tr>
<tr>
<td>RIS and A-Z for Journals</td>
<td>Indices</td>
<td>Daily</td>
<td>7:00</td>
<td>1 April, 2016 at 07:00</td>
<td>Enabled</td>
<td>View Edit</td>
<td></td>
</tr>
<tr>
<td>PMDC and other search</td>
<td>Indices</td>
<td>Weekly</td>
<td>12:30</td>
<td>5 April, 2016 at 02:30</td>
<td>Enabled</td>
<td>View Edit</td>
<td></td>
</tr>
<tr>
<td>SFX requestable</td>
<td>Class</td>
<td>Daily</td>
<td>00:59</td>
<td>1 April, 2016 at 00:59</td>
<td>Enabled</td>
<td>View Edit</td>
<td></td>
</tr>
<tr>
<td>Scratch directory</td>
<td>Class</td>
<td>Monthly</td>
<td>05:45</td>
<td>15 April, 2016 at 05:45</td>
<td>Enabled</td>
<td>View Edit</td>
<td></td>
</tr>
<tr>
<td>Getting up statistics queries</td>
<td>Class</td>
<td>Daily</td>
<td>14:20</td>
<td>30 March, 2016 at 14:20</td>
<td>Enabled</td>
<td>View Edit</td>
<td></td>
</tr>
</tbody>
</table>

© 2017 Ex Libris | Confidential & Proprietary

SFX Task Manager – Options

- Adding Tasks
- Deleting Tasks
- Editing Tasks
- List of Completed Tasks
- List of Upcoming Tasks
- List of Recommended Tasks

© 2017 Ex Libris | Confidential & Proprietary
SFX Task Manager – Unsupported Tasks

- Customized, local, or obsolete crons are not supported by the Task Manager
- Unsupported Tasks are accessible via a link at the bottom of Task Manager main page:

![Unsupported Tasks Table]

SFX Crons – Centralized Management and Task Manager

- Centrally Managed tasks are disabled in the Task Manager
- The “lock” icon indicates that the task is centrally managed:

![Crons Table]
Related Documentation


General User Guide (Localization Manager)

• https://knowledge.exlibrisgroup.com/@api/deki/files/26890/SFX_System_Administration_Guide.pdf

System Administrator Guide (Task Manager)

New Statistics Query
New Statistics Query – 21 (Unused Full-text Journals per Target)

- Reports journals which were not found in Statistics tables per query period
- Targets listed in alphabetical order
- RSI (Rapid Service Indicator) index build for journals is required
### Query 21 Results example:

**Query 21:** Unused full-text journals per target.

<table>
<thead>
<tr>
<th>Target name</th>
<th>Number of unused active portfolios</th>
<th>Total number of active portfolios</th>
<th>Percentage of unused portfolios</th>
<th>Journal ID</th>
<th>Journal Title</th>
<th>Access in other targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACM_DIGITAL_LIBRARY</td>
<td>483</td>
<td>483</td>
<td>55.98%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACM_DIGITAL_LIBRARY_PROCEEDINGS</td>
<td>5</td>
<td>5</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AMERICAN_JOURNAL_ARCHIVE_FREE</td>
<td>155</td>
<td>155</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASSETS_FREE</td>
<td>83</td>
<td>83</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BINA_FREE</td>
<td>95</td>
<td>95</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BIP身影JOURNALS_COMPUTER</td>
<td>5</td>
<td>5</td>
<td>71.43%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALLEN_PRESS_AMERICAN_ACCOUNTING_ASSOCIATION</td>
<td>14</td>
<td>14</td>
<td>100%</td>
<td></td>
<td>American Accounting Association</td>
<td>Y</td>
</tr>
<tr>
<td>ALLEN_PRESS_MEDICAllANEOUS</td>
<td>13</td>
<td>13</td>
<td>76.92%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AMERICAN_chemical_SOCiETY_JOURNALS</td>
<td>35</td>
<td>35</td>
<td>50.00%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AMERICAN_chemical_SOCIETY_LEGACY_ARCHIVE</td>
<td>77</td>
<td>77</td>
<td>50.00%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AMERICAN_ECONOMIC_ASSOCIATION</td>
<td>8</td>
<td>8</td>
<td>71.43%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AMERICAN_MAThEMATICAL_SOCIETY_JOURNALS</td>
<td>13</td>
<td>13</td>
<td>76.92%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AMERICAN_PHYSICAL_SOCIETY_CURRENT</td>
<td>3</td>
<td>3</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AMERICAN_MeteorOLOGICAL_SOCIETY</td>
<td>5</td>
<td>5</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

### SFX Menu Enhancements:

**Multi-Object Menu & DirectLink Sidebar**
SFX Multiple-Object Menu – New Templates

- Configured in SFX Admin: Menu Configuration -> Menu Design -> Multi-object menu Configuration

- No Unix access required

- Allows loading a logo via SFX Admin

- Improved functionality: option to display only full-text items.

- RSI index build required before limiting display to full-text

- Location of new templates: /exlibris/sfx_ver/sfx4_1/<instance>/templates/multiobject_v2

New Multiple-Object Menu Configuration - example

New! Limit objects to Full Text only
Direct Link Sidebar – New in 2016!

- Replaces the older Direct Link Top Menu Banner

- Customized in two locations in SFX Admin:
  1) Menu Configuration -> Menu Design -> DirectLink Sidebar configuration
  2) Menu Configuration -> DirectLink -> Enable Menu Banner/Sidebar for DirectLink

- HTML templates in:
  /exlibris/sfx_ver/sfx4_1/<instance>/templates/direct_link

- Not configured to work with HTTPS – coming in 4.10.0 (June 2017)

SFX Direct Link Sidebar – example
DirectLink Sidebar Configuration – part 1 (Menu Design)

- **Customizable CSS**
- Controls how long Sidebar is displayed

DirectLink Sidebar Configuration – part 2 (Menu Design)

- **Email Address for Help and Feedback**
- Load Custom images for full / minimized Sidebar
New option to display a link in the Sidebar frame to vendor targets that have been disabled with DirectLink

Related Documentation


General User Guide (DirectLink Sidebar/DirectLink Banner), (Configuring DirectLink) (Configuring the Multi-Object Menu)

https://knowledge.exlibrisgroup.com/SFX/Training/SFX_General_Training/SFX_DirectLink_Sidebar

Training Video – DirectLink Sidebar
A-Z List Enhancements

- Peer Review Filter
- Open Access Indicator
- getDocument Delivery service type
- DATABASE object type

- If A-Z template files were localized, follow the 4.9.3 implementation notes to add new code: https://knowledge.exlibrisgroup.com/@api/deki/files/48294/V4_0_SFX_Update_20171100_with_SP_4_9_3_Implementation_Notes.pdf
A-Z List configuration – Peer Review Filter & Open-Access Indicator

A-Z eJournal Setup: Default configuration parameters

- Journals Quick Search
  - Integrate the SFX A-Z List Quick Search box into your library homepage or any other web page.
- DISPLAY Section
  - Records per page: 20 (settings > 100 may cause performance issues)
  - Max pagination links: 7 (The default value will be 100) **
  - Pagination link character length: 3 **
  - 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 Citation Linker Tab: **
  - Metabib link: **
  - Show Peer-reviewed indication: **
    - Image Text
  - Show Peer-reviewed filter: **
  - Show Open Access indication: **
    - Image Text

© 2017 Ex Libris | Confidential & Proprietary

A-Z List – Peer Review Filter & Open-Access Indicator

Peer Review Filter

Open-Access Indicator
Document Delivery & Databases now included in the A-Z list

Document Delivery Targets with Active Portfolios

Database Object Type

New A-Z List UI coming June 2017

• New Front End will replace the E-journal A-Z list, e-Book Search, Citation Linker

• CSS and Image loading via SFX Admin

• New set of templates will be released

• Simpler, more intuitive navigation

• Better division of configuration options
Next Steps and Support Resources

• Documentation links relative to the topic:
  • Elsevier ScienceDirect Autoloader
  • Configuring Ebsco API
  • How to Enable the DirectLink Sidebar

• Additional support resources within the ExLibris Ecosystem:
  • Idea Exchange
  • System Status Pages: Single Tenant ENV / Multi-Tenant ENV
  • Developer Network

• Technical Seminar Presentations
  (located in the Cross-Product section of the CKC)
Q & A

Any Questions?

Session Survey Evaluation

Please use the following link https://www.surveymonkey.com/r/techsem2017 to provide feedback on your sessions.
THANK YOU