



SFX VERSION 3.0
SFX Workbook



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SFX Training Exercises
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Section 1: Setting Up Targets

1.1 Gathering your Proxy Server Information

Goal:

Gather information about your proxy server so that users off-site can access your materials via SFX.

Tasks:

Obtain information about your proxy server for use in SFX.

Proxy Server Address:

Please fill in your proxy server's address in the space provided below. If you do not have a proxy server or you do not allow your users to access materials when they are off-site, please leave this section blank.

Proxy Server IP Address

Please fill in the IP address of the proxy server in the space provided below. This will ensure that SFX does not proxy items when a user has already logged into the IP address.

What to Proxy

SFX has three proxy options. They are:

1. Proxy Yes – this will proxy all links in SFX when your users are offsite including the library catalog, free e-journals, etc.
2. Proxy No – users coming from offsite will not be able to access SFX links.
3. Proxy Selective – the library decides which SFX links can and can not be proxied

Please choose one of these three options. Fill in which option you prefer in the space provided below.

1.2 Gathering Username/Password Information

Goal:

Gather information about usernames and passwords in order to enable linking for certain targets.

Tasks:

Obtain information about your catalog, ILL, and databases in order to enable SFX linking.

Gathering Usernames and Passwords:

In order for SFX to communicate with certain systems and databases it requires extra information to create links. We call these extra pieces of Flags.

Please fill in the information for each of the flags on the next page. If you have any questions about the flag values you can contact your SFX Project Manager or the database provider.

FLAG NAME	INFORMATION NEEDED	YOUR FLAG VALUE
LIBRARY CATALOG – Allows your users to link to your own local holdings from the SFX Menu		
\$LOCAL_SERVER	The server address for your catalog	
INTERLIBRARY LOAN – Allows your users to link to the interlibrary loan form from the SFX Menu		
\$LOCAL_SERVER	The server address for you interlibrary loan system	
EBSCOHOST DATABASES – the values SFX needs in order to communicate with EBSCOHost		
	EBSCOHost Admin Customer ID. An example of this would be "s123456"	
	EBSCOHost Group ID where the database resides. An example of this would be "main"	
	EBSCOHost Profile ID where the database resides. An example of this would be "ehost"	
\$EH_USER_ID	Each of the three above values separated by periods. So using the above information: S123456.main.ehost	
GALE DATABASES – the values SFX needs in order to communicate with Gale		
\$LOC_ID	Your institutions location ID	

Section 2: SFX Menu Customization

Goal:

Make decisions that will help you customize your SFX Menu.

Tasks:

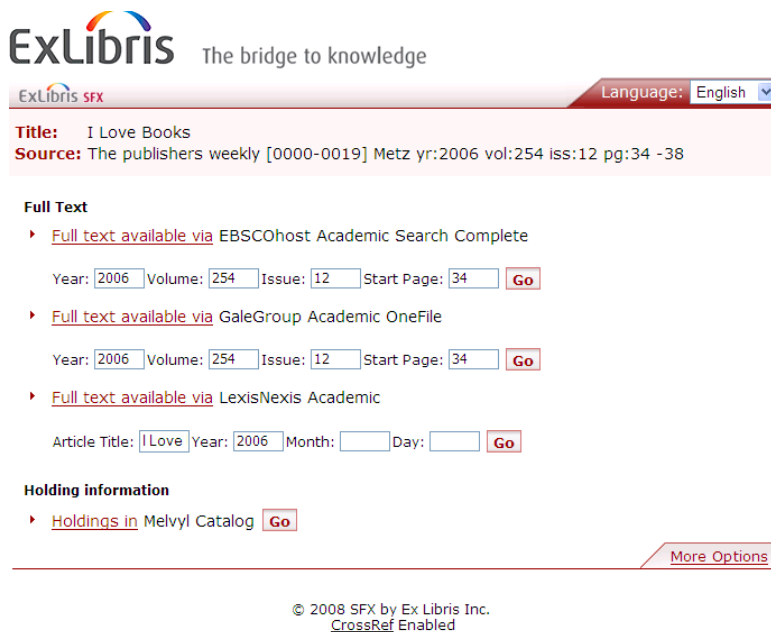
Below are the 13 different options that will help you make decisions about customizing your SFX Menu. Each of the options are listed below along with images to help you visualize what making one decision over the other will produce.

If you have further questions about customization, your SFX Trainer or Project Manager will be happy to answer them.

SFX Find IT Buttons

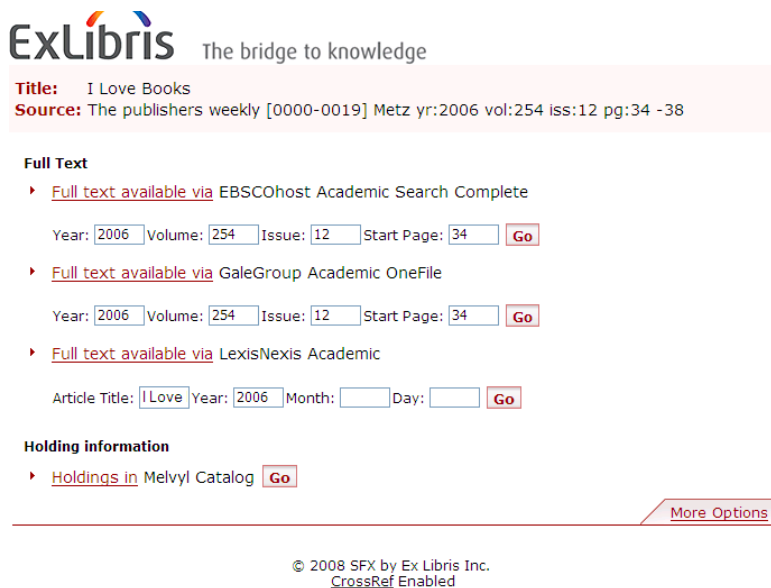
<http://igelu.org/product-working-groups/sfx/sfx-customer-site-samples>

Section 2.1: Ex Libris Logo Option



The screenshot shows the Ex Libris SFX interface. At the top left is the Ex Libris logo with the tagline 'The bridge to knowledge'. Below the logo is the 'Ex Libris SFX' text and a language dropdown menu set to 'English'. The main content area displays search results for the title 'I Love Books' from 'The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38'. Under the 'Full Text' section, there are three links: 'Full text available via EBSCOhost Academic Search Complete', 'Full text available via GaleGroup Academic OneFile', and 'Full text available via LexisNexis Academic'. Each link is followed by a search form with fields for Year, Volume, Issue, and Start Page, and a 'Go' button. The 'Holding information' section includes a link to 'Holdings in Melvyl Catalog' with a 'Go' button. At the bottom right, there is a 'More Options' link. The footer contains the copyright notice: '© 2008 SFX by Ex Libris Inc. CrossRef Enabled'.


Option 1: Show the Ex Libris Logo in the SFX Menu



This screenshot is identical to the one above, showing the Ex Libris SFX interface with search results for 'I Love Books'. It includes the logo, search details, full text links with search forms, holding information, and footer text.

Option 2: Remove the Ex Libris Logo from the SFX Menu

Section 2.2: Multi-Language Drop Down Box Option

 The bridge to knowledge

ExLibris SFX Language: English ▾

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- ▶ [Full text available via](#) EBSCOhost Academic Search Complete
Year: Volume: Issue: Start Page:
- ▶ [Full text available via](#) GaleGroup Academic OneFile
Year: Volume: Issue: Start Page:
- ▶ [Full text available via](#) LexisNexis Academic
Article Title: Year: Month: Day:


Holding information

- ▶ [Holdings in](#) Melvyl Catalog

[More Options ▾](#)

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Option 1: Show the Language Drop Down Box

 The bridge to knowledge

ExLibris SFX

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- ▶ [Full text available via](#) EBSCOhost Academic Search Complete
Year: Volume: Issue: Start Page:
- ▶ [Full text available via](#) GaleGroup Academic OneFile
Year: Volume: Issue: Start Page:
- ▶ [Full text available via](#) LexisNexis Academic
Article Title: Year: Month: Day:

Holding information

- ▶ [Holdings in](#) Melvyl Catalog

[More Options ▾](#)

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Option 2: Remove the Language Drop Down Box

Section 2.3: Menu Collapsibility Option

ExLibris The bridge to knowledge
ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- Full text available via EBSCOhost Academic Search Complete
Year: Volume: Issue: Start Page:
- Full text available via GaleGroup Academic OneFile
Year: Volume: Issue: Start Page:
- Full text available via LexisNexis Academic
Article Title: Year: Month: Day:

Holding information

- Holdings in Melvyl Catalog

[More Options](#)

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Option 1: Allow Advanced services to be collapsible

ExLibris The bridge to knowledge
ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- Full text available via EBSCOhost Academic Search Complete
Year: Volume: Issue: Start Page:
- Full text available via GaleGroup Academic OneFile
Year: Volume: Issue: Start Page:
- Full text available via LexisNexis Academic
Article Title: Year: Month: Day:

Holding information

- Holdings in Melvyl Catalog

Reference

- Copy citation information

Web Service

- Questions? Ask a Librarian

Option 2: Show all services without a collapsible section

Section 2.4: Linking to the Text Option

ExLibris The bridge to knowledge

ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- Full text available via EBSCOhost Academic Search Complete
Year: Volume: Issue: Start Page:
- Full text available via GaleGroup Academic OneFile
Year: Volume: Issue: Start Page:
- Full text available via LexisNexis Academic
Article Title: Year: Month: Day:

Holding information

- Holdings in Melvyl Catalog

[More Options](#)

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Option 1: Hyperlink the service text

ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- Full text available via [EBSCOhost Academic Search Complete](#)
Year: Volume: Issue: Start Page:
- Full text available via [GaleGroup Academic OneFile](#)
Year: Volume: Issue: Start Page:
- Full text available via [LexisNexis Academic](#)
Article Title: Year: Month: Day:

Holding information

- Holdings in [Melvyl Catalog](#)

[More Options](#)

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Option 2: Hyperlink the target name

ExLibris The bridge to knowledge

ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- Full text available via [EBSCOhost Academic Search Complete](#)
Year: Volume: Issue: Start Page:
- Full text available via [GaleGroup Academic OneFile](#)
Year: Volume: Issue: Start Page:
- Full text available via [LexisNexis Academic](#)
Article Title: Year: Month: Day:

Holding information

- Holdings in [Melvyl Catalog](#)

[More Options](#)

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Option 3: No Hyperlink (Go button will link instead)

Section 2.5: Go Button Option

ExLibris The bridge to knowledge
ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- Full text available via EBSCOhost Academic Search Complete
Year: Volume: Issue: Start Page: **Go**
- Full text available via GaleGroup Academic OneFile
Year: Volume: Issue: Start Page: **Go**
- Full text available via LexisNexis Academic
Article Title: Year: Month: Day: **Go**

Holding information

- Holdings in Melvyl Catalog **Go**

[More Options](#)

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Option 1: Show the Go Button

ExLibris The bridge to knowledge
ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- Full text available via EBSCOhost Academic Search Complete
Year: Volume: Issue: Start Page:
- Full text available via GaleGroup Academic OneFile
Year: Volume: Issue: Start Page:
- Full text available via LexisNexis Academic
Article Title: Year: Month: Day:

Holding information


- Holdings in Melvyl Catalog

[More Options](#)

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Option 2: Don't Show the Go Button

Section 2.6: Display Headers Option

 The bridge to knowledge

ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- Full text available via EBSCOhost Academic Search Complete
Year: Volume: Issue: Start Page:
- Full text available via GaleGroup Academic OneFile
Year: Volume: Issue: Start Page:
- Full text available via LexisNexis Academic
Article Title: Year: Month: Day:


Holding information

- Holdings in Melvyl Catalog

[More Options](#)

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Option 1: Display service headers

 The bridge to knowledge

ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

- Full text available via EBSCOhost Academic Search Complete
Year: Volume: Issue: Start Page:
- Full text available via GaleGroup Academic OneFile
Year: Volume: Issue: Start Page:
- Full text available via LexisNexis Academic
Article Title: Year: Month: Day:
- Holdings in Melvyl Catalog

[More Options](#)

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Option 2: Don't display service headers

Section 2.7: Fill-In Boxes Option

ExLibris The bridge to knowledge

ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- Full text available via EBSCOhost Academic Search Complete
Year: Volume: Issue: Start Page:
- Full text available via GaleGroup Academic OneFile
Year: Volume: Issue: Start Page:
- Full text available via LexisNexis Academic
Article Title: Year: Month: Day:

Holding information

- Holdings in Melvyl Catalog

[More Options](#)

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Option 1: Show fill-in boxes under each target

ExLibris The bridge to knowledge

ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- Full text available via EBSCOhost Academic Search Complete
- Full text available via EBSCOhost Business Source Complete
- Full text available via GaleGroup Academic OneFile

Holding information

- Holdings in Melvyl Catalog

[More Options](#)

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Option 2: Don't show fill-in boxes under each target

Section 2.8: Target Icon Option

ExLibris The bridge to knowledge

ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

- Full text available via EBSCOhost Academic Search Complete
Year: Volume: Issue: Start Page:
- Full text available via GaleGroup Academic OneFile
Year: Volume: Issue: Start Page:
- Full text available via LexisNexis Academic
Article Title: Year: Month: Day:

Holding information

- Holdings in Melvyl Catalog

[More Options](#)

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Option 1: Show the arrow target icon

ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

[Full text available via EBSCOhost Academic Search Complete](#)
Year: Volume: Issue: Start Page:

[Full text available via GaleGroup Academic OneFile](#)
Year: Volume: Issue: Start Page:

[Full text available via LexisNexis Academic](#)
Article Title: Year: Month: Day:

Holding information

[Holdings in Melvyl Catalog](#)

[More Options](#)

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Option 2: Use Ex Libris custom icons or create your own

ExLibris The bridge to knowledge

ExLibris SFX Language: English

Title: I Love Books
Source: The publishers weekly [0000-0019] Metz yr:2006 vol:254 iss:12 pg:34 -38

Full Text

[Full text available via EBSCOhost Academic Search Complete](#)
Year: Volume: Issue: Start Page:

[Full text available via GaleGroup Academic OneFile](#)
Year: Volume: Issue: Start Page:

[Full text available via LexisNexis Academic](#)
Article Title: Year: Month: Day:

Holding information

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Option 3: Don't show target icon

Section 2.9: Services in the Basic and Advanced Section

Services can be moved from the basic section (above the collapsible header) into the advanced section (below the collapsible header) and vice versa.

By default the following services are available in the basic section:

- getFullTxt
- getSelectedFullTxt
- getHolding
- getDocumentDelivery
- getMessageNoFullTxt

The remaining services are available by default in the advanced section.

Section 2.10: Target Ordering

By default, targets are ordered alphabetically by name. However they can be listed in whatever order you would like.

At the same time, targets can be automatically pushed to the bottom of the list.

Think about which targets you would like to appear at the top of the list and which targets you would like to appear at the bottom of the list.

Section 2.11: SFX Menu Wording

All wording on the SFX Menu can be changed via the SFX Menu Admin Center.

Think about whether you would like to change any of the wording on the SFX Menu.

Section 2.12: SFX Menu Images

All images on the SFX Menu can be changed using the SFX Admin Center.

Think about which images on the SFX Menu you would like to change and develop new images for the SFX Menu.

Section 2.13: SFX Full Text Button

Below is the default SFX Full Text Button:



This button can be changed. However the red SFX Swirlie Logo must be used in your own button. Logo images you can use while developing your button, can be provided by your SFX Project Manager.

Section 2.13: SFX Menu CSS Style Sheet

The colors in the SFX Menu can be changed by editing the CSS Style Sheet. The style sheet is located on the server in the following location:

```
/exlibris/sfx_ver/sfx_version_3/<instance>/templates/css/simplified_template1/sfxmenu.css
```

Section 3: SFX AZ List Customization

Goal:

Make decisions that will help you customize your SFX AZ List.

Tasks:

Choose among the following two options in order to configure your SFX AZ List. Your SFX Trainer will go over with you other options for customizing the SFX A-Z List.

Section 3.1: Number of Results on a Page

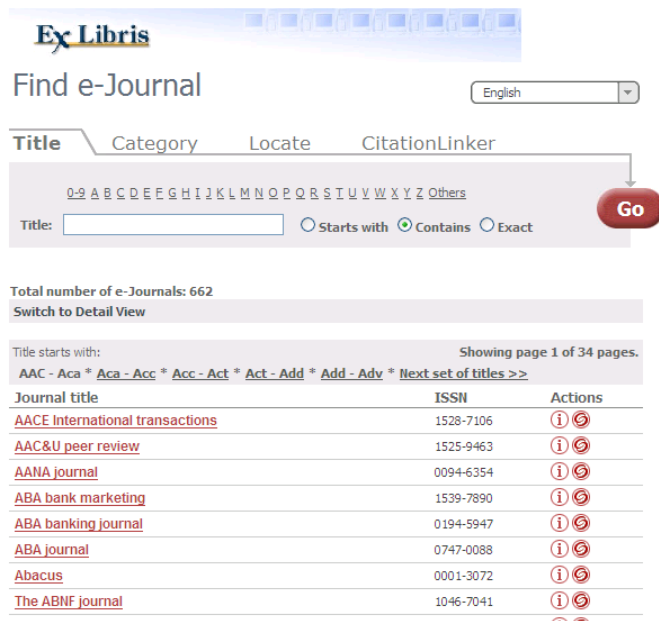
After doing a search within the SFX AZ List, SFX will display up to 100 records per page.

How many records would you like to see per search results page?

Section 3.2: Viewing the results

The SFX AZ List allows you to view your results either with detailed information or in a table.

Below are the screen shots of the two images:



The screenshot shows the Ex Libris search interface. At the top, there is a search bar with the text "Find e-Journal" and a language dropdown set to "English". Below the search bar, there are tabs for "Title", "Category", "Locate", and "CitationLinker". A search filter bar contains a dropdown menu with letters A-Z and "Others", a text input field for "Title:", and radio buttons for "Starts with", "Contains" (which is selected), and "Exact". A red "Go" button is on the right. Below the search bar, it says "Total number of e-Journals: 662" and "Switch to Detail View". A navigation bar shows "Showing page 1 of 34 pages." and a list of filters: "AAC - Aca * Aca - Acc * Acc - Act * Act - Add * Add - Adv * Next set of titles >>". The main content is a table with three columns: "Journal title", "ISSN", and "Actions".

Journal title	ISSN	Actions
AAACE International transactions	1528-7106	i 🔍
AAC&U peer review	1525-9463	i 🔍
AANA journal	0094-6354	i 🔍
ABA bank marketing	1539-7890	i 🔍
ABA banking journal	0194-5947	i 🔍
ABA journal	0747-0088	i 🔍
Abacus	0001-3072	i 🔍
The ABNF journal	1046-7041	i 🔍

Option 1: Table View



The screenshot shows the Ex Libris search interface in detail view. The search bar and navigation tabs are the same as in the table view. Below the search bar, it says "Total number of e-Journals: 662" and "Switch to Table View". A navigation bar shows "Showing page 1 of 34 pages." and a list of filters: "AAC - Aca * Aca - Acc * Acc - Act * Act - Add * Add - Adv * Next set of titles >>". The main content is a detailed view of the first result, "AAACE International transactions [1528-7106]". It includes the full text available via EBSCOHOST Business Source Complete, available from 2001, and Engineering: General and Others. Below this, there is a red "i" icon and a "🔍" icon. The second result, "AAC&U peer review [1525-9463]", is also visible, including the full text available via GaleGroup Academic OneFile, available from 2002, and Arts and Humanities: Education & Careers. Below this, there is a red "i" icon and a "🔍" icon.

Option 2: Detail View

