



## Welcome to SFX Web Training Session 4

Valli Hoski Implementation Librarian

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## Objectives

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- Be aware of different ways SFX works with DOIs and CrossRef
- Identify how to add your own local target
  - With object portfolios
  - Without object portfolios
- Identify how to add an object portfolio to an existing target
- Recognize the types of Statistics available from SFX

## Agenda

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- SFX, CrossRef, and DOI Linking
- Creating a Local Target and Object Portfolios
- SFX Statistics



## SFX, CrossRef, and DOI Linking

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## DOI

- Digital Object Identifier
- Publishers assign a number to a particular article (instead of metadata)
- CrossRef keeps track of DOI numbers and metadata associated with those numbers.



http://www.exlibrisgroup.com/category/SFXTargets

Synergy Blackwell HSS\*\*\* †  
 Synergy Blackwell STM\*\*\* †  
 Taylor and Francis\*\*\*\*  
 Tetrahedron\*\*\*  
 Thame Connect ††  
 Thomas Telford Journals †  
 Times Higher Education Supplement †  
 Transaction Publishers\*\*\*\*  
 Triangle Journals\*  
 Turpin ††  
 United Kingdom Serials Group\*\*\*\*  
 University of California Press\*\*\*\*  
 University of California Press Ebooks  
 University of Chicago Press\*\*\* †  
 Vaki  
 VakiBiotheek\*  
 Walter de Gruyter Publishing †  
 Whurr Publishers Ltd\*\*\*\*  
 Wiley InterScience †  
 Wiley InterScience Bio Backfile †, †  
 Wiley InterScience Cell and Developmental Bio Backfile †, †  
 Wiley InterScience Chemistry Backfile † †  
 Wiley InterScience Materials Science Backfile †, †  
 Wiley InterScience Neuroscience Backfile †, †  
 Wiley InterScience Online Books †, †  
 Wiley InterScience Polymer Backfile †, †  
 World Scientific Journals †, †

\*\*\* article-level linking  
 \*\* issue-level linking  
 \* volume-level linking  
 † journal-level linking  
 † article level linking through CrossRef/DOI

www.exlibrisgroup.com/category/SFXTargets

**SFX Target List**  
 indicates which  
 journals have **DOIs**

## DOI: Receiving DOIs From a Source

[Vaccination against Neisseria meningitidis Using Three Variants of the Lipoprotein GNA1870](#)

versions »

... Kroll, JA Welsch, DM Grandoff, R Rappuoli, M Pizza - Journal of Experimental Medicine, 2003 - Rockefeller Un  
 Sepsis and meningitis caused by serogroup D meningococcus are devastating  
 diseases of infants and young adults, which cannot yet be prevented by  
 vaccination. By genome mining, we discovered GNA1870, a new surface-exposed ...  
 Cited by 47 - Related Articles - Web Search - Ex Libris Demo - Other

[Synthesis and Activity of 1,3,5-Triphenylimidazolidine-2,4-diones and](#)

versions »

... C Charlier, GKE Scriba, T Pizzo, P Di Pace, P De ... - J. Med. Chem, 2006 - pub  
 Obesity and metabolic syndrome, along with drug dependence (nicotine, alcohol,  
 opiates), are two of the major therapeutic applications for CB-1 cannabinoid  
 receptor antagonists and inverse agonists. In the present study, we report ...  
 Cited by 3 - Related Articles - Web Search - Ex Libris Demo - Other

[Intranasal immunization with genetically detoxified diphtheria toxin induc](#)

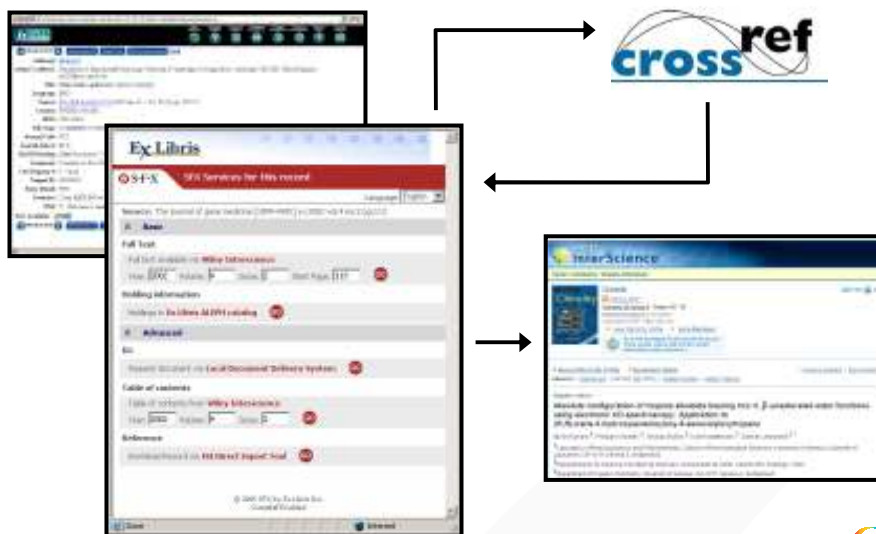
versions »

... J Jabbar-Gill, L Illum, M Pizza, R Rappuoli, A ... - Vaccine, 2004 - Elsevier  
 We previously reported that intranasal immunization with a non-toxic mutant  
 cross-reacting material (CRM) 197 of diphtheria toxin, formulated with chitosan,  
 generated protective neutralizing antibodies in mice and guinea pigs ...  
 Cited by 20 - Related Articles - Web Search - Ex Libris Demo - Other

## DOI: Receiving DOIs From a Source

- Must receive a username and password from CrossRef; this requires signing a license agreement.
- Will you be enabling sources that use DOIs in their OpenURL links?
  - Google Scholar
  - Variety of Science/Health Databases

## DOI: Linking to Targets Using DOIs



## DOI: Linking to Targets Using DOIs

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- Can I get to the full text without turning on DOI via CrossRef?
- How well does DOI linking work once enabled?

## Setting Up CrossRef Linking

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- **Server Side Activities**
  - Enter your CrossRef username and password into the crossref.config file on the server
- **Admin Center Activities**
  - Check the CrossRef for box located in the Target Service Record.
  - Repeat for each target you want to enable CrossRef Linking for.
  - Test the targets that you enabled to ensure the linking works correctly.

*Use of CrossRef is recommended for the value of the metadata coming in or going out.*



## Creating a Local Target with No Object Portfolios

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## Creating a Local Target with No Object Portfolios

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- Why Create a Target with No Object Portfolios?
  - Add a static link to the SFX Menu
  - Create your own search target to a particular library resource

## Step 1: Create the Target

- Use the Add New Target
  - Located in the upper left hand corner of the target list
  - Allows you to create your own local target
- Set up your Target
  - Choose an Internal Name
  - Choose a name that the public will see.
  - Choose a service type
- Click Submit

The screenshot shows the 'Add Target' form. The 'Target' field is set to 'AGK\_A\_LIBRARIAN'. The 'Public Name' field is also 'AGK\_A\_LIBRARIAN'. The 'Service' dropdown is set to 'getWebService'. The 'Threshold' is set to 'local'. There are 'Compose' and 'Clear' buttons below the threshold field. The 'Submit' button is in the top right corner. Red boxes highlight the 'Target', 'Public Name', and 'Service' fields.

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## Step 2: Edit the Target Service Record

- Find your new Target in the list
- Move to the list of Target Service Records
- Edit the Target Service Record
- Choose a public name for the service
- Set Object Lookup
- Add a target parser
- Create a linking structure

The screenshot shows the 'Edit Target Service' form. The 'Internal ID' is '2484080808080802'. The 'Target' is 'AGK\_A\_LIBRARIAN'. The 'Service' is 'getWebService'. The 'Public Name' is 'Creators?'. The 'Proxy' is 'Generic'. The 'Parse Parser' is 'if 1'. The 'Display' field is empty. The 'Object Lookup' is set to 'Yes'. The 'Threshold' is set to 'global'. There are 'Compose' and 'Clear' buttons below the threshold field. The 'Submit' button is in the top right corner. Red boxes highlight the 'Public Name', 'Parse Parser', and 'Object Lookup' fields.

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## Creating a Local Target with Object Portfolios

- Why Create a Local Target with Object Portfolios?
  - Your institution publishes its own electronic publications
  - Want to refer your users to a particular bibliographic item within the package

## Step 1: Create the Target

- Use the Add New Target
  - Located in the upper left hand corner of the target list
  - Allows you to create your own local target
- Set up your Target
  - Choose an Internal Name
  - Choose a name that the public will see.
  - Choose a service type
- Click Submit

The screenshot shows the 'Add Target' form with the following fields and options:

- Target:** MP\_LOCAL\_portfolio
- Publication:** My Library's Local E-Journals
- Service:** FullText (selected from a dropdown menu)
- Check for updates:**
- Display:**
- Administer:**
- Title:** [Empty text box]
- Description:** [Empty text box]
- Availability:**  Active  Inactive

## Step 2: Edit the Target Service Record

- Find your new Target in the list
- Move to the list of Target Service Records
- Edit the Target Service Record
- Choose a public name for the service or leave it blank to use the default
- Set Object Lookup
- Choose a Target Parser

Internal ID: 2434000000000001  
Target: MY\_LOCAL\_JOURNALS  
Service: getFullFac  
Public Name:   
Parser: Bulk::BULK  
Pass Param:   
Display:   
Object Lookup:  Yes  No  
Threshold (global):   
Threshold (local):   
Compose Clear  
Availability:  Active  Inactive

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## Step 4: Create a Link Using the Bulk::BULK Target Parser

Internal ID: 2434000000000004  
Target: MY\_LOCAL\_JOURNALS  
Service: getFullFac  
Public Name:   
Parser: Bulk::BULK  
Pass Param:   
Display:   
Object Lookup:  Yes  No  
Threshold (global):   
Threshold (local):   
Compose Clear  
Availability:  Active  Inactive

- Bulk::BULK Target Parser
  - Links to a static link
  - Doesn't utilize metadata when creating a link
  - Format for link is `jkey=http://www.url.com`
  - Link format is placed in the Object Portfolio's Parse Param

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## Step 5: Add the Object Portfolio

- Click the Add New Portfolio button
- Select an object using the Select Object button
- Set your threshold using the Compose button
- Add your link to the object portfolio record
- Click Submit

The screenshot shows the 'Add Object Portfolio' form. The 'Object' field is highlighted with a red box. The 'Parse Param' field contains the value 'key=object//requestid -url-orig' and is also highlighted with a red box. The 'Submit' button at the bottom right is highlighted with a red box.

## Practice: Local Targets and Object Portfolios



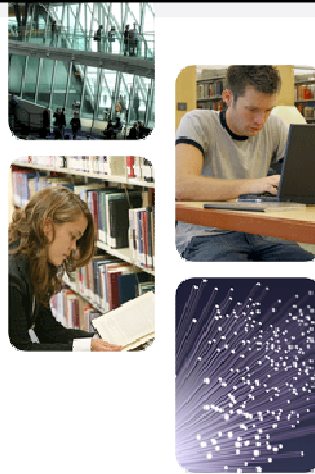
### Exercise 4.1 – Adding a Local Target to SFX with no Object Portfolios

Using the knowledge you just learned and the steps outlined in the SFX Exercises booklet, try adding a local target to your library's "Ask A Librarian" web service page.



### Exercise 4.2 – Adding an Object Portfolio Manually to a Target to SFX

Using the knowledge you just learned and the steps outlined in the SFX Exercises booklet, try adding an object portfolio to an existing target .



## SFX Statistics

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Glossary of icons in the Access column: ✓ - Full Access | R - Read Only | X - No Access

KBManager	
Access	Tool Name
✓	<a href="#">Sources</a>
✓	<a href="#">Targets</a>
✓	<a href="#">Search Objects</a>
✓	<a href="#">User Parameters</a>
✓	<a href="#">Institutes</a>

Troubleshooting	
Access	Tool Name
✓	<a href="#">OpenURL Generator</a>
✓	<a href="#">Debugging</a>
✓	<a href="#">SFX Help Form</a>
✓	<a href="#">KB changes via CRM</a>

Administrator Tools	
Access	Tool Name
✓	<a href="#">SFXAdmin Users</a>
X	<a href="#">UNIX File Manager</a>
✓	<a href="#">Menu Configuration</a>
✓	<a href="#">Translations &amp; Display</a>

KBTools	
Access	Tool Name
✓	<a href="#">DataLoader</a>
✓	<a href="#">Look-Up Tool</a>
✓	<a href="#">Export Tool</a>
X	<a href="#">MARCIt! Tool</a>
✓	<a href="#">TargetMatcher</a>
✓	<a href="#">Threshold Tool</a>
✓	<a href="#">Category Tool</a>
✓	<a href="#">Collection Tool</a>
✓	<a href="#">Advanced Collection Tool</a>

KBUpdate Reports	
Access	Tool Name
✓	<a href="#">TEXT Report</a>
✓	<a href="#">HTML Report</a>

Statistics	
Access	Tool Name
✓	<a href="#">SFX Queries</a>
✓	<a href="#">Scheduled Queries List</a>

## Many Options For Statistics Reporting

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- **Frequency** - emailed a yearly, monthly, weekly or even daily basis.
- **Format** - HTML file or text tab delimited file usable in Excel, Access, or similar programs.
- Sort statistics via **IP addresses**
  - For a range of IP addresses
  - Exclude a particular IP address or range of IP addresses.



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## SFX Terminology Recap

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*Statistics can help a library to analyze SFX usage based on*

- **Requests** - any time an OpenURL is sent to the SFX server, or any time an SFX menu is generated.
- **Clickthroughs** - any time a user chooses an option on the menu, clicks the URL and land at the URL generated for them.
- **Target** - where a user ends up at after they choose an option on the SFX menu
- **Target Service** - type of service (getFullTxt, getHoldings, getWebService, getWebSearch) a user chooses on the SFX Menu.
- **Source** - where a user clicks on the SFX button, or where a user starts their search.



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## Many Query Types – Requests and Services

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### *Number of Requests and clickthroughs*

- per day
- per source
- per object type
- per service type
- by IP Address

### *Top target services shown in the SFX menu*



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## Many Query Types – Clickthroughs, Popular Journals

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### *Number of clickthroughs*

- per target
- per target service
- per one particular journal

### *Most popular journals, and how selected*

- selected by target
- selected by source



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## **Many Query Types – Full-text Usage and Availability**

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*Journals requested but have no full-text available in SFX*

*Number of SFX requests with/without full-text services*

*Services preferred over full-text*

*Unused full-text journals*

## **Many Query Types – Other**

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*Selected document delivery targets by source*

*Books accessed via SFX ranked by use*

*Number of requests which resulted in SFX menu screen without services*

*OpenURLs that resulted in no full text services, selected by source*

## **Statistics Documentation**

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### ***Set-up Documentation - Statistics Information***

- Provides guidance on types of reports
- Describes report content and analysis usage



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[www.exlibrisgroup.com/sfx.htm](http://www.exlibrisgroup.com/sfx.htm)

