
***2014–2015 SFX System Committee:
Annual Report of Activities and Annual Project***

Membership:

Xiaotian Chen, 2013-2016, Bradley University
Andrea Imre, 2013-2015, Southern Illinois University Carbondale, Chair
Stacey Knight-Davis, 2013-2015, Eastern Illinois University
Joanna Kolendo, 2014-2016, Chicago State University
Jeffrey Matlak, 2014-2017, Western Illinois University
Andy Meyer, 2014-2017, North Park University
Jim Millhorn, 2013-2015, Northern Illinois University
Steve Oberg, 2013-2016, Wheaton College, Vice-Chair

CARLI Staff Liaisons:

Paige Weston
Denise Green
Mary Burkee

Meetings

One in-person meeting at the CARLI Office in June 2014 and monthly meetings on the second Wednesday of each month via phone.

SFX administrator survey

The committee conducted a survey of CARLI SFX administrators in the Fall of 2014. The online survey consisted of 14 questions and aimed to assess SFX administrators' needs, satisfaction level with SFX, and perception of patrons' satisfaction. The response rate was a very favorable 63%.

The survey revealed a wide range of differences across SFX administrators' knowledge and comfort level with SFX.

The SFX committee focused on two strategies to help those most in need:

1. Open conference calls for SFX administrators, where administrators are free to ask any question about SFX.
2. Informal peer-to-peer mentoring activities.

Nineteen representatives from CARLI SFX libraries attended the first open conference call, held in February 2015, as well as several SFX committee members. Attendees posed various questions related to menu configuration, display logic, subscription entitlements, weekly update responsibilities, and more. Committee members and CARLI staff participating on the call were ready to provide feedback and assistance. When asked, attendees stated that they were very satisfied by this outreach effort, and expressed an interest in future open conference calls. As a result, the committee decided to hold open conference calls on a quarterly basis. The second open conference call took place on May 20, 2015, with 10 SFX library representatives, as well as SFX committee members. Discussion topics included the

shared instance, SFX representation of partial full text coverage, representation of ebooks in the SFX KB, and weekly update responsibilities. These open conference calls helped the committee with prioritizing tutorials that were still in the planning stage.

The second strategy was the creation of an informal peer-to-peer network. Originally the committee envisioned pairing committee members with SFX administrators interested in a peer mentoring program. One of the survey questions enabled the committee to identify SFX administrators interested in specific SFX improvements. The committee reached out to five libraries interested in adding a chat window to their SFX menu, nine libraries that wanted to improve ILL services via SFX, six libraries that expressed an interest in loading print into SFX, and nine libraries that wanted to customize their menus. The e-mails included references to CARLI documentation and when appropriate, contact information for one or more committee members who could be reached for personal assistance. The response rate to these e-mails was very low, with only one SFX administrator requesting personal help.

In addition to these two above-mentioned strategies addressing high priority training needs, the committee focused on offering SFX administrators help with redesigning their library's SFX button. At the time of the survey, sixteen CARLI libraries still had not customized their SFX buttons. The committee believed that the generic SFX button, with its non-descriptive design, did not offer sufficient information to library patrons about the functionality of SFX. The committee hypothesized that a customized, institution-specific button using labels that describe the openURL functionality of the linkresolver, such as Find it, Get it, Get article, or Full Text @..., would result in increased SFX usage. The committee worked on several strategies to encourage the sixteen libraries to replace the generic, non-descriptive SFX button with an institution-specific button: e-mail notifications were sent out, personal help to design institution-specific buttons was offered, and a video tutorial was created on button design. The most successful strategy proved to be offering pre-designed buttons for reuse. Six out of the original sixteen libraries customized their SFX button. Denise Green and Paige Weston gave a presentation at ELUNA about the measurable effects of button customization.

Training videos

Committee members were involved in the creation of the SFX training videos posted on the CARLI site at <http://www.carli.illinois.edu/products-services/link-resolver-sfx/secure/sfx-admin-series>. Here are a few examples of the videos created during the year:

- How Does SFX Know What We Subscribe To? The CARLI Shared Instance
- What Do I Need To Know about Target Parsers and Parse Params?
- How Do I Use SFX to Assess My Collections? Journal Coverage
- How Do I Use SFX to Assess My Collections? Using SFX to Compare Library Databases Holdings
- How Do I Log in to SFXAdmin
- What Are My Duties When CARLI Applies a KB Update?
- How Do I Customize my SFX Button?

Free/Open Access target evaluation

A sub-committee evaluated Free/Open Access targets included in the SFX Knowledgebase (KB) and distributed an Excel sheet to CARLI members. Free/Open Access targets were assigned to one of three tiers, based on various criteria (e.g. language, vendor's linking performance, reputation of target, platform/provider/publisher information). This tiered ranking helps SFX administrators evaluate free/open access targets in the SFX KB and to select reliable open access content via SFXAdmin. These open access collections can be very valuable to library patrons.

Feedback to CARLI staff during training material preparation

The committee provided significant feedback during the creation of a pathfinder to SFX tutorials (<http://www.carli.illinois.edu/products-services/link-resolver-sfx/secure/sfx-admin-series-tour>) and the SFX trouble tree, a troubleshooting flowchart (<http://www.carli.illinois.edu/products-services/link-resolver-sfx/secure/sfx-trouble-tree>).