

Individual subscription activations in SFX

SUMMARY: The videos listed below and two examples are designed to help SFX administrators choose SFX targets for individual subscriptions, set them up in SFX, provide a list of steps involved, and an example record keeping system.

The CARLI website has a series of videos that can help with locating and activating individual subscriptions in SFX. These video tutorials are a good place to start:

How do I tell SFX what we subscribe to? Part 2: Individual titles or small groups of titles

<https://www.youtube.com/watch?v=Zaxe9NJWI0A&feature=youtu.be>

How Do I Tell SFX What We Subscribe To? Using the Dataloader

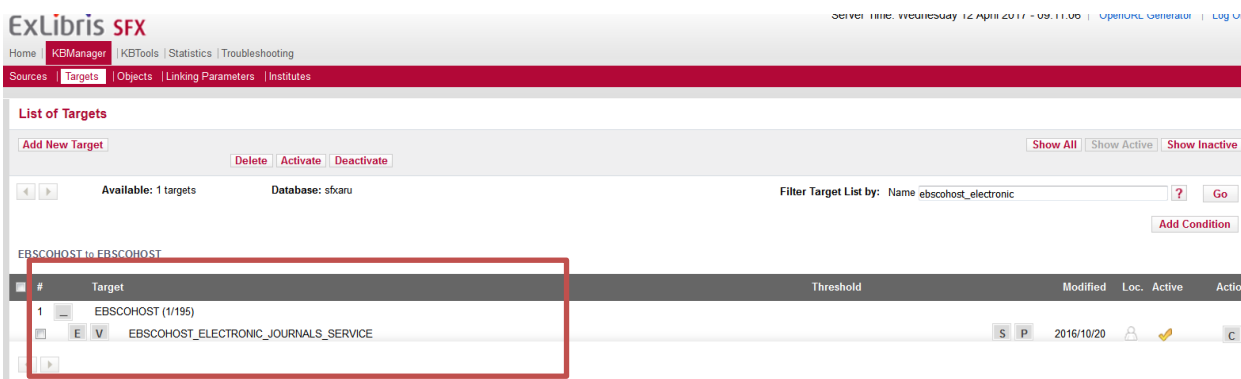
<https://www.youtube.com/watch?v=uxMmriDxkmg&feature=youtu.be>

Example 1: by Lauren Jackson-Beck

Activation of Individual Journal Titles Case Example: Ovid

Example background: Our library has a list of 5 individual journal titles published by Ovid and purchased through EBSCO's Electronic Journals Service. When these titles are activated in the Target EBSCOHOST_ELECTRONIC_JOURNALS_SERVICE they link first to EJS and then through to the publisher's site. The link to the publisher's site resolves only to the journal level and not to the individual article level.

Image: This is the Target for the EBSCOHOST_ELECTRONIC_JOURNALS_SERVICE



We can improve the linking of these titles by using a Target directly to the publisher, rather than using the EJS Target. Here's how:

Step 1: Locate the appropriate publisher Target in SFX.

We are using the Target OVID_JOURNALS_AT_OVID.

Image: Target for OVID_JOURNALS_AT_OVID

OVID (50) NEW										
<input type="checkbox"/>	E	V	BOOKS_AT_OVID_PURCHASE		S	P	2012/03/01			C
<input type="checkbox"/>	E	V	BOOKS_AT_OVID_PURCHASE_AUTOLOAD		S	P	2016/09/08			C
<input type="checkbox"/>	E	V	BOOKS_AT_OVID_SUBSCRIPTION		S	P	2012/03/01			C
<input type="checkbox"/>	E	V	BOOKS_AT_OVID_SUBSCRIPTION_AUTOLOAD		S	P	2016/09/08			C
<input type="checkbox"/>	E	V	DRAA_OVID_LWW		S	P	2016/05/29			C
<input type="checkbox"/>	E	V	EIRA_LWW_ARCHIVE NEW		S	P	2017/03/28			C
<input type="checkbox"/>	E	V	EZB_LIPPINCOTT_WILLIAMS_AND_WILKINS		S	P	2016/07/17			C
<input type="checkbox"/>	E	V	OVID_ADIS_INTERNATIONAL_COLLECTION		S	P	2010/02/04			C
<input type="checkbox"/>	E	V	OVID_ATLA_RDB		S	P	2010/02/04			C
<input type="checkbox"/>	E	V	OVID_CINAHL		S	P	2010/02/04			C
<input type="checkbox"/>	E	V	OVID_CIRCULATION_COLLECTION		S	P	2010/02/04			C
<input type="checkbox"/>	E	V	OVID_COCHRANE_DATABASE_SYSTEMATIC_REVIEWS		S	P	2010/02/04			C
<input type="checkbox"/>	E	V	OVID_JOURNALS_AT_EXTENDED_ARCHIVE		S	P	2013/11/07			C
<input type="checkbox"/>	E	V	OVID_JOURNALS_AT_OVID		S	P	2017/03/22			C
<input type="checkbox"/>	E	V	OVID_JOURNALS_AT_OVID_AUTOLOAD		S	P	2016/09/08			C
<input type="checkbox"/>	E	V	OVID_LIPPINCOTT_WILLIAMS_AND_WILKINS_CURRENT_OPINION_COLLECTION		S	P	2010/02/04			C

Step 2: Make sure the Target Service has the appropriate level of service.

We want getFullText. Click on S to see the services available for this Target. This service is there, so we will activate the service by clicking on the check. Now the Target service is activated.

Image: View the appropriate Target service, and then click on the “Active” check

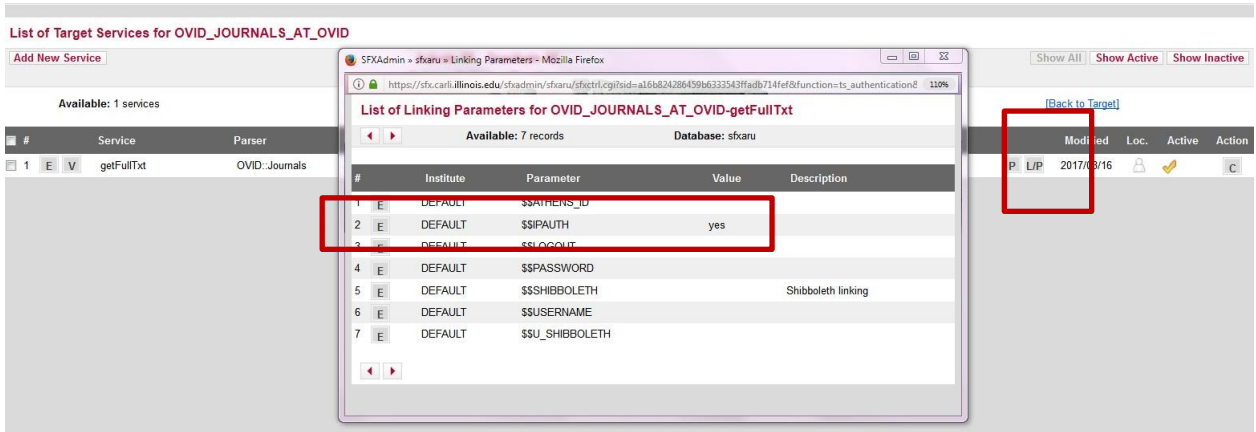
List of Target Services for OVID_JOURNALS_AT_OVID										
Add New Service										
Activate All Deactivate All										
Delete Activate Deactivate										
Show All Show Active Show Inactive										
Available: 1 services		Database: sfxaru		Target: OVID_JOURNALS_AT_OVID		[Back to Target]				
#		Service	Parser	Threshold	Modified	Loc.	Active	Action		
1	<input type="checkbox"/>	E	V	getFullText	OVID:Journals					
					P	L/P	2017/03/16			C

Before we add our titles, we want to make sure that we can use our IP range authentication with this link directly to Ovid. First, we can check with the publisher to see what coding should be used with SFX. There is a specific answer to this question on the Ovid website.

It is a good idea to check with individual publishers to see what SFX information they can provide to streamline your choices in SFX. Libraries may have different proxy servers and different authentication pathways. For EZ Proxy and Ovid, we need to make sure that IP authentication is set to “yes.”

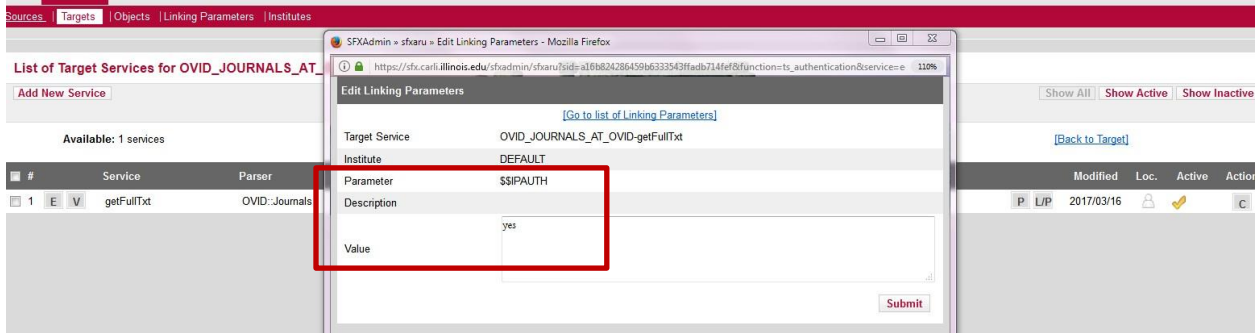
Click on the L/P button see a pop-up window with a list of Linking Parameters:

Image: Pop-up window with a list of Linking Parameters



Step 3: Click on the “E” button to edit the \$\$IPAUTH parameter.

Image: Editing the Linking Parameters pop-up for IP authentication.

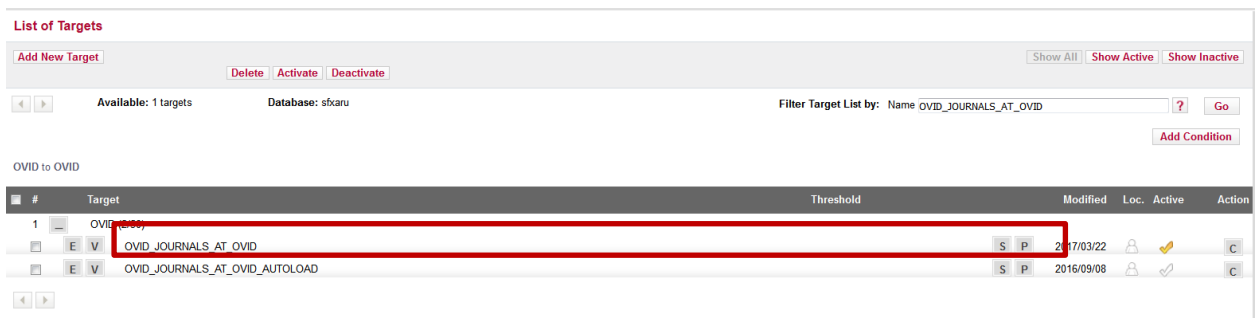


In the “Value” box, type “yes” and submit. Now the link to Ovid journal articles will be IP authenticated.

Step 4: Return to the Ovid Target and click on the check mark to activate the Target.

After you click on the check mark for activating your Target, you will then select your journal titles.

Image: Target List. Activate the Target and select journal titles (objects) within the portfolio by clicking on the “P”



Step 5: Activate specific titles in the List of Portfolios for OVID_JOURNALS_AT_OVID.

Image: List of Portfolios for the Target OVID_JOURNALS_AT_OVID.

List of Portfolios for OVID_JOURNALS_AT_OVID

Add New Portfolio Activate All Deactivate All Show All Show Active Show Inactive

Delete Activate Deactivate Show 20 portfolios per page

Find portfolio by Title Go Showing page 1 of 166 Database: sfkaru Jump to page Jump

Available: 3315 portfolios [Back to Target](#) [Back to List of Services](#)

#	Service	Object	Title	Threshold	Mod.	Loc.	Act.	Actions
1	E V	getFullTxt 0001-2092	Association of Operating Room Nurses. AORN Journal	Sobj->parsedDate(>=,'1995;61;1')	2016/05/02			C
2	E V	getFullTxt 0001-2815	Tissue antigens	Sobj->parsedDate(>=,'1996,47,1') && Sobj->pa...	2017/01/11			C
3	E V	getFullTxt 0001-2815	Acta anesthesiologica Scandinavica	Sobj->parsedDate(>=,'1996,40,1')	2010/02/04			C
4	E V	getFullTxt 0001-6314	Acta neurologica Scandinavica	Sobj->parsedDate(>=,'1996,93,undef)	2013/01/30			C
5	E V	getFullTxt 0001-6349	Acta obstetrica et gynecologica Scandinavica	Sobj->parsedDate(>=,'1990,69,undef)	2013/01/30			C
6	E V	getFullTxt 0001-6772	Acta Physiologica Scandinavica	Sobj->parsedDate(>=,'1996,157,undef) && Sob...	2015/08/09			C
7	E V	getFullTxt 0001-690X	Acta psychiatrica Scandinavica	Sobj->parsedDate(>=,'1996,94,undef)	2013/01/30			C
8	E V	getFullTxt 0001-8244	Behavior Genetics	Sobj->parsedDate(>=,'1996,26,1') && Sobj->pa...	2015/08/09			C
9	E V	getFullTxt 0002-0443	The Journal of nursing administration	Sobj->parsedDate(>=,'1996;26;1')	2017/03/16			C
10	E V	getFullTxt 0002-8614	Journal of the American Geriatrics Society	Sobj->parsedDate(>=,'1996,44,1')	2010/02/04			C
11	E V	getFullTxt 0002-8703	The American Heart Journal	Sobj->parsedDate(>=,'1995,129,1')	2010/02/04			C

The list is sorted by ISSN number (Object). You can change the order to sort by title by clicking on the title heading, or you can search for your individual titles by entering the name or ISSN number in the search box “Find portfolio by” above the list. Note that the Service column is showing that these titles are getFullTxt.

Step 6: Display your active targets.

When you have located and activated your individual titles, you can review all of them by clicking on the “Show Active” button on the right. Now you will need to check the thresholds of these Objects and update them to reflect the individual dates available for each journal.

Image: Show Active Targets

List of Portfolios for OVID_JOURNALS_AT_OVID

Add New Portfolio Activate All Deactivate All Show All Show Active Show Inactive

Delete Activate Deactivate Show 20 portfolios per page

Find portfolio by Title Go Showing page 1 of 1 Database: sfkaru Jump to page Jump

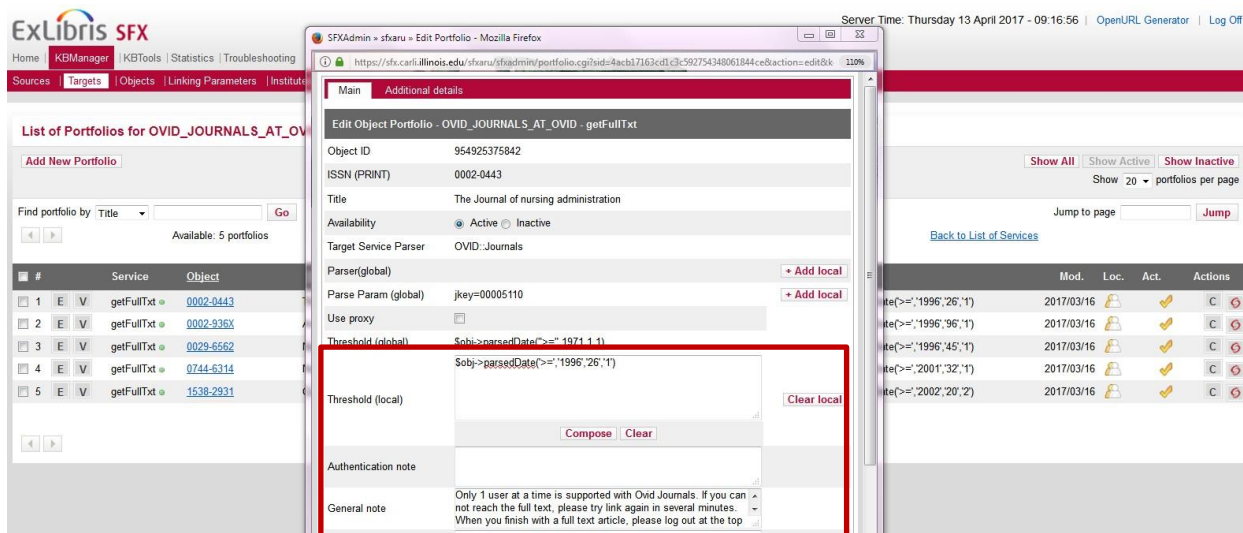
Available: 5 portfolios [Back to Target](#) [Back to List of Services](#)

#	Service	Object	Title	Threshold	Mod.	Loc.	Act.	Actions
1	E V	getFullTxt 0002-0443	The Journal of nursing administration	Sobj->parsedDate(>=,'1996;26;1')	2017/03/16			C
2	E V	getFullTxt 0002-936X	American journal of nursing	Sobj->parsedDate(>=,'1996;96;1')	2017/03/16			C
3	E V	getFullTxt 0029-6562	Nursing research	Sobj->parsedDate(>=,'1996;45;1')	2017/03/16			C
4	E V	getFullTxt 0744-6314	Nursing Management	Sobj->parsedDate(>=,'2001;32;1')	2017/03/16			C
5	E V	getFullTxt 1538-2931	Computers, informatics, nursing	Sobj->parsedDate(>=,'2002;20;2')	2017/03/16			C

Step 7: Edit your Objects (Individual journal titles),

Click on the Edit button “E” to the left of each service.

Image: Pop up menu for editing the journal title (Object Portfolio).



Each journal title will have a Threshold (global) already created for the journal title. You will need to create a local threshold to correctly identify the years, volumes, and issues available to your patrons. To complete the local threshold, click on the Compose button. Enter the information needed to program the proper threshold for your subscriptions.

This is also where a general note can be entered to alert users to anything unique about the journal title or the publisher’s website. In image 8 you see the general note alerting students to log out of the publisher’s site when they are finished.

When finished, click on Submit.

Step 8: Check your SFX linking

Check to see that the SFX linking is correct by clicking on the swirl to the right of the page. A pop-up will appear showing the SFX linking for each journal title. You can see the linking parameters and how your general note will display.

Your individual titles are now added to SFX.

Example 2: by Karen Gallacci

Representing Individual Subscriptions in SFX

(to be used with Excel file "Representing Indv Subs in SFX SAMPLE MASTER LIST")

Step 1: Start with Access & Registration information from Vendor

We will use EBSCO as an example. Downloaded report from EBSCONET/Reports tab/E-journal Access and Registration

Step 2: License workflow

Step 3: Add columns for SFX TARGET, SFX ACTIVE Date, Test Date, Local Threshold, NOTE

Step 4: Look at the factors of Remote Access, IP, Proxy Allowed, required username & password

- If all yes then this is a normal SFX set-up
- If yes IP, no proxy and/or no remote access = "This journal is only available on campus"
--ADD TO PUBLIC NOTE FIELD
- If no IP support and no proxy = "Username & password required - Contact Reference Desk" --
ADD PUBLIC NOTE & HOW TO OBTAIN PASSWORD

Step 5: Set up policies - examples

- If resource requires a username & password and if purchased in print = do not activate online in SFX
- Staff use subscriptions are not represented in SFX (Cataloger's Desktop)
- Separate accounts or packages kept on separate tabs

Step 6: Move titles that won't be represented in SFX to a separate tab.

Step 7: Look at Publisher Pkg and group columns:

- Add to front of publisher name OR in parenthesis for explanation of acronym.

Step 8: Registration

Sort by publishers and register with the publishers if required using EBSCO account info for that title

- Create Company table: URL to Admin site, User ID, passwords
- Register with the host platforms if necessary
- Add to Company table: URL to Admin site, User ID, passwords

Step 9: Decide which target to use & set up proxy

Sort by Host first, this is probably the most appropriate target; major publishers host their own content

Check for access from Highwire in SFX

For remaining titles, search by ISSN in SFX; at this point most likely Mics E-journals is your choice.

TIP: For easier maintenance individually subscribed titles are on a separate target from databases and back-files when possible. If that is not possible make an internal note that this is an individual subscription

Step 10: Activate in SFX and check date

Service set-up:

- NO auto-active (you do not want titles you don't subscribe to activating with an update)
- YES auto update
- ALWAYS proxy

Step 11: Test & verify dates

If necessary, create a local threshold in SFX. Add the date under local threshold column on your spreadsheet

If no access:

Look at access restrictions

Look at General notes for clues

Step 12: Maintenance

Watch weekly SFX updates

Test all subscriptions Quarterly.

Every year any publishers with rolling access, thresholds may need changed

Every year those which require annual registration must be re-registered

GENERAL NOTE: lines can be highlighted different colors if waiting for something to happen before proceeding