Using SFX to Increase the Benefit from CARLI Libraries' Affiliate Membership in the Five College Library Depository

CARLI libraries became affiliate members of the Five College Library Depository (FCLD) in May 2011. CARLI libraries are eligible to request document delivery on behalf of their patrons if:

- The CARLI library subscribes to an electronic journal and
- The electronic full text of the journal is either unavailable or inadequate for the patron's purposes.

FCLD-specified workflow[1] is for library staff to search the FCLD OPAC and then to submit an ILL request via email. For CARLI libraries that use SFX, SFX can suggest when searching the FCLD OPAC will be worthwhile. Because of the nature of the FCLD document delivery service, however, SFX should be configured so that the FCLD suggestion displays only to staff, not to users.

The remainder of this document presents SFX configuration strategies to enhance CARLI libraries' use of the FCLD.

Step 1. To make the FCLD OPAC searchable from your library's SFX menu, activate the LOCAL_CATALOGUE_EX_LIBRIS_ALEPH target and its getHolding service in your local SFX instance.

Recommended Public Display Name for the target:
Five College Library Depository Catalog

Recommended General Note on the target service:
  If electronic full text should have been--but was not--available from
another target, CARLI libraries are authorized to <a target="_blank"
href="http://www.carli.illinois.edu/mem-serv/coll-
man/fivecollegelibdepository.html#ILL">request document delivery from
the Five Colleges Library Depository on behalf of their patrons.

Recommended Linking Parameter (L/P) values:

```
$$ALEPH_DATABASE                    FCL01
$$ALEPH_VERSION                     ALEPH_18
$$AUTHOR_INDEX                      WAU
$$BOOK_TITLE_INDEX                  WTI
$$DUAL_ISBN                         1
$$FILTERED_TITLE_SEARCH             YES
$$ISBN_INDEX                        ISBN
$$ISSN_INDEX                        ISSN
$$JOURNAL_TITLE_INDEX               WSE
$$LNG                               ENG
$$LOCAL_ALEPH_URL                   http://fcaw.library.umass.edu
$$LONGEST_WORDS_SEARCH              YES
```

Note that CARLI has modified the ExLibris::ALEPH target parser, for all SFX instances on the CARLI server, so that any search submitted from SFX will be filtered to the FCDPT (depository) location.

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[1] http://www.carli.illinois.edu/products-services/collections-management/five-college-library-depository#ILL

Step 2 (strongly recommended). To make the FCLD target appear on SFX menus for library staff but not users, there are at least two alternatives (if you have other alternatives to suggest, please share them with the CARLI Office):

- Some libraries make extensive use of the SFX CitationLinker in their ILL workflows, but do not expose the CitationLinker to the public. If the CitationLinker is a staff-only interface in your library, then you can use that fact to restrict the FCLD target to staff-generated SFX menus. **Step 2, alternative 1**: add a threshold to the LOCAL_CATALOGUE_EX_LIBRIS_ALEPH-getHolding target service requiring that the source of the request for a menu be the CitationLinker:

  ```
  GLOBAL && $obj->need('sfx.sid','eq','sfxit.com:citation')
  ```

- If ILL staff will be working from a predictable IP address, you can use that fact to restrict the FCLD target to staff-generated SFX menus. **Step 2, alternative 2**: add a threshold to the LOCAL_CATALOGUE_EX_LIBRIS_ALEPH-getHolding target service requiring that the request for a menu come from a particular address or range of addresses:

  ```
  GLOBAL && $ENV{'HTTP_X_FORWARDED_FOR'} =~ /^255.255.255.255/
  ```

  (For instance, the threshold "`GLOBAL && $ENV{'HTTP_X_FORWARDED_FOR'} =~ /^128.174/`" would prevent the target from appearing on a menu unless the request originated in the CARLI Office.)

Step 3 (optional). To make the FCLD target appear on SFX menus only for the right titles:

ILL staff might find it acceptable for the FCLD target to display on any SFX menu they generate. If this is the case, no configuration is required beyond what is described in Steps 1 and 2 above (and possibly Step 4 below). If they would prefer for it to display only when the request is for a journal or a journal article (since it is only for ejournal subscriptions that the FCLD serves as a print back-up), you can (**Step 3, alternative 1**) modify the local threshold beyond the suggestions in Step 2. Instead of "`GLOBAL && …`," modify the threshold to require that the request include metadata that describe a journal or journal article:

```
($obj->need('ISSN') || $obj->need('eISSN') || $obj-
>need('journalTitle') || $obj->need('@abbrevTitle')) && …
```

If ILL staff would prefer for the FCLD target to display only when the request is for a title at one of the targets for which FCLD holds a print back-up, it will be necessary either to load object portfolios or to define a number of separate display logic rules. The approach you take will probably depend on the number of FCLD-archived targets you have active, and the ratio of that number to the number of full text targets you have active overall.

The FCLD serves, to the extent its collection allows, as the print back-up for electronic journals available from the following targets:
- AMERICAN_CHEMICAL_SOCIETY_LEGACY_ARCHIVE
- AMERICAN_PHYSICAL_SOCIETY_JOURNALS
- APA_PSYCARTICLES or ELSEVIER_SD_AMERICAN_PSYCHOLOGICAL_ASSOC
- INSTITUTE_OF_PHYSICS_JOURNALS
- INSTITUTE_OF_PHYSICS_HISTORICAL_ARCHIVE

- JSTOR_COMPLETE
- PROJECT_MUSE_PREMIUM_COLLECTION

If you have one or more of these targets (or relevant subtargets) active in your SFX instance but not very many additional targets active, it will probably be simplest for you (**Step 3, alternative 2**) to control the display of the FCLD target via display logic. You will need a rule for each of your active targets that is not backed up by the FCLD, which says, "`IF AVAILABLE: [specific target name] getFulltxt DO NOT SHOW: LOCAL_CATALOGUE_EX_LIBRIS_ALEPH-getHolding`." If you are linked to the CARLI shared instance, remember to create rules for the full text targets activated for you there[2]. Note that if you already have a more general display logic rule that suppresses any getHolding target services in the presence of getFullTxt target services, you will need to disable that rule.

To control the display of the FCLD target on a title-by-title basis you will need (**Step 3, alternative 3**) to load local object portfolios to the LOCAL_CATALOGUE_EX_LIBRIS_ALEPH-getHolding target service:

- In the Edit Target Service window for LOCAL_CATALOGUE_EX_LIBRIS_ALEPH-getHolding, set local Object Look-up to `Yes`.
- Use the Export Tool to download the object portfolios from the FCLD-archived targets you have active.
- Edit the Export Tool's output to create a tab-separated file of identifiers (object IDs or ISSNs) and availability information ("`ACTIVE`").
- Use the DataLoader to add local object portfolios to LOCAL_CATALOGUE_EX_LIBRIS_ALEPH-getHolding.
- If you have a display logic rule that prevents getHolding services from displaying when a getFullTxt service is available, add a condition to the rule that exempts requests from staff. You will want to set a threshold condition on the display logic rule that is the inverse of the threshold assigned to the LOCAL_CATALOGUE_EX_LIBRIS_ALEPH-getHolding target service in Step 2. For instance, if only staff use the CitationLinker (and if they use it as part of their ILL workflow) you might define a display logic rule like this:

  ```
  IF AVAILABLE: any target getFullTxt DO NOT SHOW: any target
  getHolding CONDITION: $obj-
  >need('sfx.sid','ne','sfxit.com:citation')
  ```

Step 4. To include a reminder in the ILL request emails that staff receive in libraries that use the DOCDEL_LOCAL target, about the existence of the FCLD archival print copies that might be used to fill an ILL request, libraries can modify their local copy of the docdel.cgi. For instance, to the list of "`my $...`" variable definitions that follow the line "`our $cgi = CGI->new();`" you might add the line:

`my $issn = $cgi->param('ISSN');`

and then, after the closing bracket of the "`foreach my $param_name (@params)`" loop in the `send_email` subroutine, add the lines:

`if ($issn){`

`$message .= "\nPresumably you are receiving this ILL request because electronic full text was not available via SFX. Reminder: CARLI libraries are authorized to request free document delivery from the`

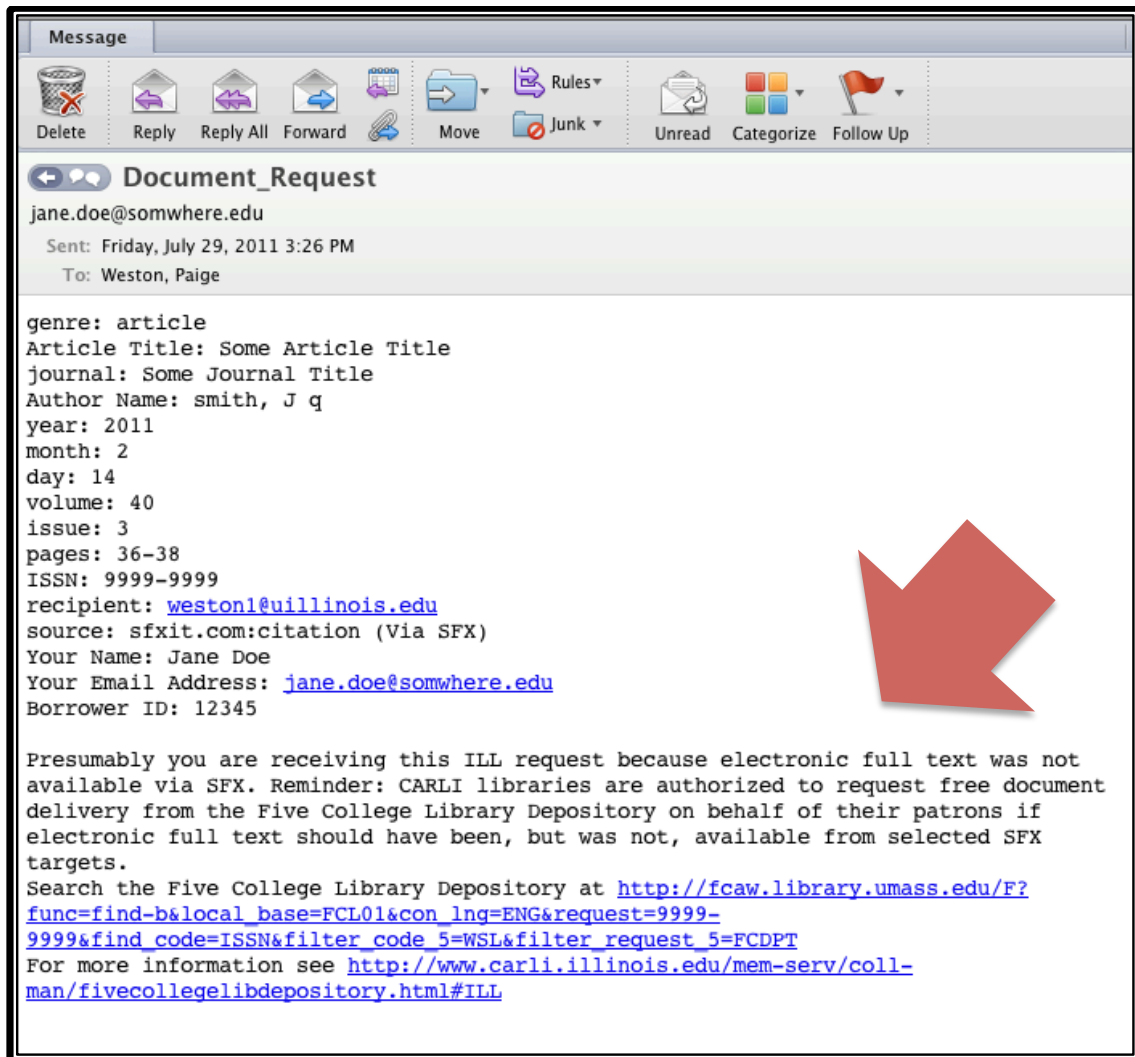[2] http://www.carli.illinois.edu/products-services/link-resolver-sfx/secure/shared-targets

```
Five College Library Depository on behalf of their patrons if
electronic full text should have been, but was not, available from
selected SFX targets.";

$message .= "\nSearch the Five College Library Depository at
http:\/\/fcaw.library.umass.edu\/F?func=find-
b&local_base=FCL01&con_lng=ENG&request=$issn&find_code=ISSN&filter_code
_5=WSL&filter_request_5=FCDPT";

$message .= "\nFor more information see
http:\/\/www.carli.illinois.edu\/mem-serv\/coll-
man\/fivecollegelibdepository.html\#ILL";

}
```

These changes will cause a hyperlinked message to appear to staff at the bottom of any emailed ILL request they receive that contains an ISSN:

The link to the Five College Library OPAC will execute a search, filtered to the FCDPT (depository) location, for the ISSN of the context object.