

## Post-Training Checklist for SFX Implementation: Suggested Tasks Adapted for CARLI, Revised November 2012

### Summary of Tasks to Implement SFX

✓ Required Tasks	? Optional Tasks
<input type="checkbox"/> Confirm the correct people are subscribed to CARLI's email distribution list.	<input type="checkbox"/> Subscribe additional people to email distribution lists.
<input type="checkbox"/> Activate at least one SFX Target.	<input type="checkbox"/> Activate all your SFX Targets.
	<input type="checkbox"/> Customize the look-and-feel of SFX.
	<input type="checkbox"/> Configure an ILL/document delivery service.
<input type="checkbox"/> Test!	
<input type="checkbox"/> Activate at least one SFX Source.	<input type="checkbox"/> Activate all your SFX Sources.
<input type="checkbox"/> Test some more!	
<input type="checkbox"/> Alert library staff.	<input type="checkbox"/> Launch a PR or instruction campaign.
<input type="checkbox"/> Develop and follow a plan for monitoring SFX KB update reports.	

### “In Production” versus “Live”

As soon as your library's SFX instance was established on the CARLI server, SFX was “in production” for you, from CARLI's point of view. Because you are “in production,” CARLI staff will make regular backups of your SFX instance, apply weekly updates and periodic patches, make your usage statistics available for reporting, and regenerate your SFX A-Z list as needed.

When you “go live” with SFX, on the other hand—that is, when you roll SFX out in front of your users—is up to you. In order to “go live,” all that is truly required is one active SFX Target and one active SFX Source. By the end of your training day you probably had several active Targets, particularly if you have opted to have your SFX instance linked to CARLI's shared instance. By the next day your A-Z list had been generated, so you also had at least one Source.

You may decide to “go live” right away, with a small number of Targets and Sources, or you may decide to spend time first on activating more of your Targets, localizing Target thresholds, customizing the look-and-feel of SFX user interfaces, or making other local preparations before allowing your users to see your implementation of SFX. The following is a list of suggested or recommended tasks for you to accomplish. It is up to you how much of each of these tasks you complete before you “go live.”

### Subscribe to email distribution lists.

CARLI staff have already subscribed your SFX contact people (as identified by your library liaison) to the list [sfx-ig@carli.illinois.edu](mailto:sfx-ig@carli.illinois.edu). This list is used to announce Knowledge Base updates and other matters of interest, including general discussion of SFX in the CARLI environment.

Optional:

- Subscribe additional people to [sfx-ig@carli.illinois.edu](mailto:sfx-ig@carli.illinois.edu). (See <http://carli.illinois.edu/mailman/listinfo/sfx-ig> for more information.)

- Subscribe interested people to the SFX user group list, [sfx-discuss-l@listserv.nd.edu](mailto:sfx-discuss-l@listserv.nd.edu). (See <http://www.lsoft.com/scripts/wl.exe?SL1=SFX-DISCUSS-L&H=LISTSERV.ND.EDU>.)
- Subscribe interested people to the SFX customer list, [sfx\\_supp@exlibris-usa.com](mailto:sfx_supp@exlibris-usa.com). (Send a list of names and email addresses to [sfx\\_help@exlibrisusa.com](mailto:sfx_help@exlibrisusa.com).)

### Finish configuring Targets.

In SFXAdmin use the KBManager and DataLoader. You will need to organize your current e-journal subscriptions by provider name and ISSN. Contact CARLI staff at [support@carli.illinois.edu](mailto:support@carli.illinois.edu) if you need help. A pre-existing organization scheme, such as an e-journals tracking database or an Excel spreadsheet listing your e-journal subscriptions, can aid in the process.

#### **Basic Instructions for configuring full-text Targets (for further information see *SFX General User's Guide*, "Data Management" section):**

1. Sign on to SFXAdmin.
2. Locate the desired Target in the list of Targets. (Use the "filter" box to find it by name.)
3. Activate the Target. (Click the hollow checkmark icon in the "Active" column.)
4. Click the "S" button for that Target to drill down to the Target Service level. Activate the getFullTxt Service. (You may also want to activate other Target Services such as getAbstract or getTOC.)
5. Click the "P" button beside the getFullTxt Target Service to drill down to the Object Portfolio level.
  - a. If the Target is an aggregator, click the "Activate All" button.
  - b. If the Target is one through which your library has access to selected titles only, use the "Find Portfolio by..." function to locate and activate appropriate Object Portfolios, or use the DataLoader to activate appropriate objects in bulk. See DataLoader instructions in *SFX General User's Guide*. Remember to save your Excel file as tab-delimited text.

#### Optional:

- If you are considering whether to load print journal holdings from your catalog into SFX, see <http://www.carli.illinois.edu/mem-prod/sfx/secure/local-holdings-sfx4.zip> .
- If your institution uses a proxy server for patron authentication then:
  - If you have defined your proxy as "selective" in Menu Configuration→Proxy / CrossRef, check the "Proxy" box at the Target Service or Object Portfolio level, as appropriate. (See *SFX General User's Guide*, "Editing Target Services" section.)
  - Use the Export Tool to "Export URLs from active targets," in order to enable access to those URLs through your proxy server.
  - If you want your users' connections to Targets from CARLI's shared instance of SFX to be proxied as well, make sure you send your proxy server information to [support@carli.illinois.edu](mailto:support@carli.illinois.edu) .

- To improve article-level linking for some Targets, edit the `crossref.config` file with your institution's CrossRef username and password. (See the ***SFX Advanced User's Guide***, Chapter 13.)
- See the ***SFX Target Configuration*** manual for additional information that may be needed in order to connect to some Targets. Some targets require "linking parameters," entered via the "L/P" button at the Target Service level.

Remember to test *each* Target before you consider it "finished."

### Customize look-and-feel.

Optional:

- Decide on the SFX button image and linking text to use in those Source systems that allow you to customize them. If you customize the button, be sure to include the SFX "swirl" within the image; this is required by contract with Ex Libris. To see a display of the buttons in use by other CARLI libraries, see "Comparing SFX Instances on the CARLI Server" at [http://www.carli.illinois.edu/mem-prod/sfx/sfx\\_compare.html](http://www.carli.illinois.edu/mem-prod/sfx/sfx_compare.html).
- Adjust wording. Targets and Services can be renamed. In particular, libraries probably want to change the Public Name of the LOCAL\_CATALOGUE\_\* Target from the vendor's name to the name of their local OPAC. Other on-screen wording can be changed via SFXAdmin→Translations & Display.
- Decide which services to display in the SFX Menu and the order in which to display them. Service precedence can be set in SFXAdmin→Menu Configuration→Menu Design→Service Precedence. Note that CARLI policy is that the "Report a Problem" link (LOCAL\_FEEDBACK-getWebService) must display on the Menu at all times, so getWebService must be among the "Basic" services on the Service Precedence tab if the "Collapsible" box is checked on the Menu Design tab.
- Consider "display logic": should certain Targets or Target Services be suppressed from the Menu in certain circumstances? See the ***SFX General User's Guide***, "Display Logic" section.
- Develop the look-and-feel you want for your SFX Menu, SFX A-Z List, and SFX Citation Linker. Two kinds of files control most of the look-and-feel: template files (\*.tmpl) and cascading stylesheets (\*.css).
- Request access to the UNIX File Manager within the web-based SFX Admin Center, if desired. Library liaisons may request library staff access to the UNIX File Manager by filing a request in Work Request Online (<http://wro.carli.illinois.edu>); non-I-Share libraries may email the request to [support@carli.illinois.edu](mailto:support@carli.illinois.edu). The alternative to the UNIX File Manager is to request individual files from CARLI staff ([support@carli.illinois.edu](mailto:support@carli.illinois.edu)). CARLI staff will send the files for you to edit offline. When you edit them and send them back, CARLI staff will load them onto the SFX server for you to test.

These are just a few examples of design elements you may customize in SFX. We strongly encourage you to read through the "Menu Configuration" section of the ***SFX General User's Guide*** for a more comprehensive listing of possible customizations.

Remember to test the look-and-feel from a variety of browsers and with a variety of computer monitors before you consider it "finished."

## Document Delivery Requests

Optional:

- Activate one of the DOCDEL\_\* Targets.
- If you wish to use the generic web-based document delivery request form supplied by SFX, please refer to “CARLI Recommendations for Libraries that Activate the DOCDEL\_LOCAL Target in SFX” at [http://www.carli.illinois.edu/mem-prod/sfx/sfx-docdel\\_local-target.html](http://www.carli.illinois.edu/mem-prod/sfx/sfx-docdel_local-target.html) .

## Test, Test, Test!

Even if you make no local customizations to your SFX instance, it is important to test.

### Basic Instructions for testing a Target using the OpenURL Generator supplied with your SFX instance:

1. Go directly to your Target, following whatever method you would have used before you began using SFX. Find a full text article there. Make note of the article-level metadata (ISSN or journal title, year, volume, issue, starting page).
2. Open your OpenURL Generator (available via SFXAdmin) and enter the metadata into the form.
3. Click “Submit” (you can check the box to view the OpenURL along the way if you like).
4. You should see an SFX Menu that includes your Target, with wording, etc. as you have designed it.
5. At this point your test is only half-finished!
6. Click the Target button on the SFX Menu. A third window will open. You should be taken to the Target site.
  - a. If you go to the article you looked up “by hand” in step 1, the test is successful.
  - b. If you do not go to the article you looked up in step 1, here are some things to check:
    - i. The “Additional details” tab of the Edit Target Service window contains Linking Level information. It may be possible to take the user only to a journal-issue or journal-title level for the Target you are testing.
    - ii. Did you fill in any required local Target Service parse\_param or Linking Parameter [L/P] information? Examples are your OPAC URL or Gale loc\_id. Check the **SFX Target Configuration** manual to see if local information needs to be added.
    - iii. You could also turn on Debugging mode if your Target doesn’t appear as it should on the SFX Menu, or if you don’t arrive at your Target as expected. Debugging will deliver extra code, which may help determine the source of the problem. See chapter 6 of the **SFX General User’s Guide**.

## Configure Sources.

One of the last required steps in “going live” with SFX is to activate your Sources. Once a Source is activated, your patrons will begin to see—and probably use—the SFX button that will appear in the Source system’s interface.

Contact Source database providers to set up Sources to deliver OpenURLs to your SFX server. You may wish to move in stages, activating just a few Sources at a time. Remember to ask for a test account, if test accounts are available, so your users won't see SFX buttons in the Source's interface before you want them to.

- See **SFX Source Configuration** manual.
- Your "base URL" is [http://sfx.carli.illinois.edu/sfx\\*\\*\\*](http://sfx.carli.illinois.edu/sfx***) (where \*\*\* is the CARLI three-letter code for your library).
- Your SFX button image is found by default at [http://sfx.carli.illinois.edu/sfx\\*\\*\\*/sfx.gif](http://sfx.carli.illinois.edu/sfx***/sfx.gif) (where \*\*\* is the three-letter code for your library).

Remember to test *each* Source before you consider it "finished."

### Roll SFX out to your users.

Notify library staff, particularly reference and interlibrary loan staff.

It may be useful to think of this implementation in terms of phases. Phase I could be what is essential to "go live" and to provide a reliable and accurate service to your patrons. Once that has been completed, Phase II could be about doing more customizing, etc. It is really the library's decision how much to customize SFX. Obviously, the more customizing you do the more time is involved.

Optional:

- Develop end user documentation or FAQs. (To link from the SFX Menu to a locally-produced FAQ you can use the Generic Parser. See the **SFX Advanced User's Guide**.)
- Integrate the SFX A-Z List into your web pages. Your A-Z List is at [http://sfx.carli.illinois.edu/sfx\\*\\*\\*/a-z](http://sfx.carli.illinois.edu/sfx***/a-z) (where \*\*\* is CARLI's three-letter code for your library). If you wish to customize the look and feel of your A-Z list, see the "A-Z List" section of chapter 8 of the **SFX General User's Guide**, chapter 3 of the **SFX Advanced User's Guide**, and CARLI's documentation at [http://www.carli.illinois.edu/mem-prod/sfx/secure/a-z\\_custom.pdf](http://www.carli.illinois.edu/mem-prod/sfx/secure/a-z_custom.pdf).
- Integrate the SFX Citation Linker into your web pages. Your Citation Linker is at [http://sfx.carli.illinois.edu/sfx\\*\\*\\*/cgi/core/citation-linker.cgi](http://sfx.carli.illinois.edu/sfx***/cgi/core/citation-linker.cgi) (where \*\*\* is CARLI's three-letter code for your library). See the "CitationLinker" section of chapter 10 of the **SFX General User's Guide**.

### Maintenance

Establish a plan for ongoing maintenance and KBupdate reports. Coordinate: who is responsible?

The quality of the KnowledgeBase is critical to the success of SFX. No matter how pretty you make the interface look, if the data are not accurate then the system will not serve your users well. Database maintenance should become part of someone's routine in the library to ensure that the data remain accurate.

When new object portfolios are added to active targets that SFX considers aggregators, the "Aggregator Settings" for the AutoActive feature mean those object portfolios will be activated automatically. Conversely, when new object portfolios are added to active targets that SFX does not consider aggregators, the "Aggregator Settings" for the AutoActive feature mean the object portfolios will not be activated automatically. The "Aggregator" yes/no flag is visible on the main Edit Target window. The "AutoActive" setting is configurable on the main Edit Target Service window. If your library has access only to selected titles from targets marked "Aggregator," change the AutoActive value from "Aggregator Settings" to "No." If your library has access to

every title from a target not marked “Aggregator,” change the AutoActive value from “Aggregator Settings” to “Yes.”

If the library has made any customizations to its activated Targets (for instance changes to the “Parse Param” field), those will override what’s in the global KB, including any updates made to the global KB. Clicking the “Automatic Update” button at the Target Service level authorizes the SFX KB Update process to overwrite local values.