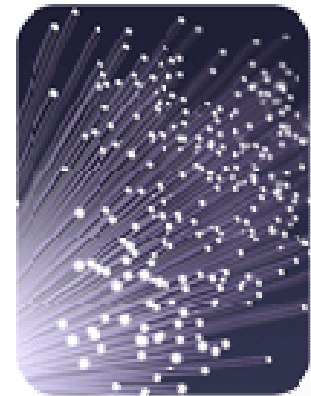
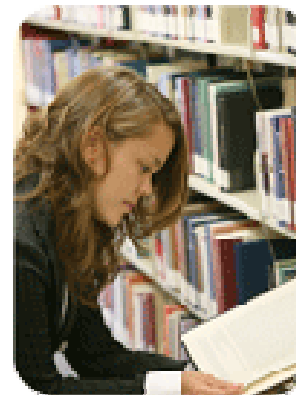




MetaLib KnowledgeBase – Information Resource Database MetaLib Version 4.3

Copyright Statement and Disclaimer

All of the information and material, including text, images, logos and product names, is either the property of, or used with permission by, Ex Libris Ltd. The information may not be distributed, modified, displayed or reproduced – in whole or in part – without the prior written permission of Ex Libris Ltd.

TRADEMARKS

Ex Libris, the Ex Libris logo, Aleph, SFX, SFXIT, MetaLib, DigiTool, Verde, Primo, Voyager, MetaSearch, MetaIndex and other Ex Libris products and services referenced herein are trademarks of Ex Libris, and may be registered in certain jurisdictions. All other product names, company names, marks and logos referenced may be trademarks of their respective owners.

DISCLAIMER

The information contained in this document is provided on an "AS IS" basis for general information purposes only without any representations or warranties, whether express or implied, including any implied warranties of satisfactory quality, completeness, accuracy or fitness for a particular purpose.

Ex Libris, and its subsidiaries and related corporations disclaim any and all liability for use of this information, even if advised of the possibility that loss, damage or expenses may arise.

© Ex Libris Ltd., 2009

MetaLib Management Interface

- Web-based interface for resources

The screenshot displays the ExLibris MetaLib web interface. At the top, the logo "ExLibris MetaLib" is on the left, and "Powered by ExLibris MetaLib" is on the right. Below the logo is a navigation bar with links: MAIN MENU, SFX ADMIN, USER INFO, STATISTICS, METAINDEX, CATEGORIES ADMIN, PORTAL ADMIN, MANAGE QUICKSETS, and END SESSION. Below this bar are two buttons: FIND RESOURCE and RESOURCE LIST. A yellow banner below the buttons displays the user "mladmin (ALL)".

Below the navigation bar, the text "Ongoing Menu" is displayed. Underneath, there are two main sections:

- MetaLib KnowledgeBase**
 - Resource Cataloging and Configuration
 - Find a Resource
 - Browse List of Resources
 - Add a New Resource
 - View Resources Added in CKB Update
 - View Resources Changed in CKB Update
 - Update or Activate Resources
 - Export-Import Procedures
 - Restart Z39 Gate
- MetaLib Administration**
 - Set-Up
 - Institutional Settings
 - Portal Administration
 - Define Default Profiles
 - Manage QuickSets
 - Categories Administration
 - Staff Administration
 - User Administration
 - Register Users
 - List of Users
 - Portal Look and Feel

Navigating the KnowledgeBase

Resource List

Browse by Resource Name

Filter by: Institution: Status: ☐ All resources ☒ Active ☐ Testing ☐ Inactive

Jump to:

[? CKB notes](#) [S Subscription](#) [P Presentation](#) [T Copy](#) [D Delete](#) [A Add](#) [E Edit](#) [V View](#)

* Inactive Link between IRD and Config

IRD Action	Resource name	Resource ID	Status	Configuration code	Access Method	Config Action
? S P T D	Humanities Abstracts (EBSCO) - CENTRAL	LKV00326	A C I C T	EBSCO_QHS	Z39	V D
? S P T D	Humanities Abstracts (EBSCO) - UNI1	LKV01290	A C I C T	EBSCO_QHS	Z39	V D
? S P T D	Humanities Abstracts (EBSCO) - UNI2	LKV01354	A C I C T	EBSCO_QHS	Z39	V D
? S P T D	Humanities Abstracts (EBSCO) - UNI3	LKV01418	A C I C T	EBSCO_QHS	Z39	V D
? S P T D	Humanities Abstracts (EBSCO) - UNI4	LKV01482	A C I C T	EBSCO_QHS	Z39	V D
? S P T D	Humanities Abstracts (OCLC) - CENTRAL	LKV00220	A C I C T	OCLC_WHUM	Z39	V D
? S P T D	Humanities Abstracts (OCLC) - PUB1	LKV01553	A C I C T	OCLC_WHUM	Z39	V D

Navigating the KnowledgeBase

[ADD A NEW IRD](#)

Find Resource

Field	Value
Filter by institution:	Metalib
Filter by user group:	
Filter by status:	☐ All resources ☒ Active ☐ Testing ☐ Inactive
Resource name:	
Resource ID :	
Configuration code:	
Resource type:	
Publisher:	
Creator:	
Any words:	
Free/Subscription:	
Country	
NEW resources date (YYYYMMDD)	
NEW resources User group filter	
Library system:	
MetalIndex Resource	
System number:	
Configuration	

Types of MetaLib Resources

There are three types of MetaLib Resources:

- **MetaLib Search and View:**
 - search via MetaLib interface
 - number of hits in MetaLib interface
 - result list in MetaLib interface
 - full record displayed in MetaLib interface
- **MetaLib Search and Link:**
 - search via MetaLib interface
 - number of hits in MetaLib interface
 - link to native interface to view results list
- **MetaLib Link:**
 - Link to native interface to search the resource

Resources in the KnowledgeBase

MetaLib has a KnowledgeBase that holds technical and descriptive data for the resources accessed via MetaLib

Each resource in the KnowledgeBase has the following:

Information Resource Description (IRD) record

- Mandatory
- Includes descriptive, local information (ie. your cataloguing record)
- What the user sees in MetaLib

Configuration record

- Required for 'Search and View' and 'Search and Link' resources
- Contains programs and rules for
 - * searching records
 - * retrieving records from resources
 - * constructing OpenURLs

Resources in the KnowledgeBase

Browse by Resource Name

Filter by: Institution: Status: ☐ All resources ☒ Active ☐ Testing ☐ Inactive

Jump to:

☐ ? CH ☐ Presentation ☐ Copy ☐ Delete ☐ Add ☐ Remove Link between IRD and Config

IRD

Config

IRD Action	Resource name	Resource ID	Status	Configuration code	Access Method	Config Action
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (EBSCO) - CENTRAL	LKV00326	☒ A ☐ I ☐ T	EBSCO_QHS	Z39	☐ ? ☐ D
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (EBSCO) - UNI1	LKV01290	☒ A ☐ I ☐ T	EBSCO_QHS	Z39	☐ ? ☐ D
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (EBSCO) - UNI2	LKV01354	☒ A ☐ I ☐ T	EBSCO_QHS	Z39	☐ ? ☐ D
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (EBSCO) - UNI3	LKV01418	☒ A ☐ I ☐ T	EBSCO_QHS	Z39	☐ ? ☐ D
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (EBSCO) - UNI4	LKV01482	☒ A ☐ I ☐ T	EBSCO_QHS	Z39	☐ ? ☐ D
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (OCLC) - CENTRAL	LKV00220	☒ A ☐ I ☐ T	OCLC_W/HUM	Z39	☐ ? ☐ D
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (OCLC) - PUB1	LKV01553	☒ A ☐ I ☐ T	OCLC_W/HUM	Z39	☐ ? ☐ D

The IRD

- Every resource in MetaLib needs a 'cataloguing record' in the Local KnowledgeBase
- This is the Information Resource Description (IRD) record
- The IRD consists of a number of tabs:
 - Subscription
 - Presentation: Primary
 - Presentation: Secondary
 - Presentation: Library
 - Local
 - Categories
 - CKB Hints & Notes
- The only mandatory fields required in the IRD record are:
 - Full name
 - Display name
 - Institution

The IRD – Subscription

ExLibris Metalib

Powered by ExLibris Metalib

MAIN MENU | SFX ADMIN | USER INFO | STATISTICS | METAINDEX | CATEGORIES ADMIN | PORTAL ADMIN | MANAGE QUICKSETS | END SESSION

FIND RESOURCE | RESOURCE LIST

mladmin (ALL)

2 Resource Name: JSTOR Arts & Sciences V Collection XML Gateway - HOPE

*Mandatory fields

Subscription | Presentation: Primary | Presentation: Secondary | Presentation: Library | Local | Categories

Full Name * JSTOR Arts & Sciences V Collection XML Gateway

Display Name * JSTOR Arts & Sciences V Collection

Institution * Liverpool Hope University

Secondary Affiliation [List of user groups](#)

IP Filter [List of IP filters](#)

Configuration Code JSTOR_XML

Free/By Subscription Subscription

Link to Native Interface URL <http://www.jstor.org/search>

Proxy Server Flag ☐ No need for proxy server ☐ Use proxy server

Search Proxy Server Flag ☐ No need for search proxy server ☐ Use search proxy server

Hostname:Port <http://www.jstor.org/action/doXmlSearch?version=1.1&operation=searchRetrieve&recordS>

Database Code

Authentication

Link to Records in Native Interface

Number of Sessions

Cataloger's Note

Verde Indicator ☐

Verde Access Type

Version 03.13

Region

Entry Date (YYYYMMDD)

Last Update (YYYYMMDD) 20090427

Alternative Link to Native Interface URL

Alternative Link to Records in Native Interface

Resource ID: HOP01435 Source ID: CKB03391 Original ID: Sysno: 000003611

NEXT TAB | SAVE | SAVE & EXIT | RESOURCE LIST | MAIN MENU | DELETE

The IRD – Presentation: Primary

ExLibris Metalib

Powered by ExLibris Metalib

MAIN MENU | SFX ADMIN | USER INFO | STATISTICS | METAINDEX | CATEGORIES ADMIN | PORTAL ADMIN | MANAGE QUICKSETS | END SESSION

FIND RESOURCE RESOURCE LIST

mladmin (ALL)

Resource Name: JSTOR Arts & Sciences V Collection XML Gateway - HOPE

*Mandatory fields

Subscription Presentation: Primary Presentation: Secondary Presentation: Library Local Categories

Type Index

Type

Type

Status ☐ Active ☒ Testing ☐ Inactive

Link to Configuration Active? ☒ Yes ☐ No

Suppress SFX Button? ☐ No ☐ Yes

Resource Icons jstor

Description JSTOR (www.jstor.org) is a not-for-profit organization with a dual trusted archive of important scholarly journals, and to provide access to these journals as widely as possible.

Filter for Subset

Expiry Date for NEW Resource (YYYYMMDD)

Filter for NEW Resource User Group

User Group

User Group

Link to Holdings in Native Interface

Rank 3

CJK language Not CJK

CJK Transliterated Title

The IRD – Presentation: Secondary

ExLibris MetaLib

Powered by ExLibris MetaLib

MAIN MENU | SFX ADMIN | USER INFO | STATISTICS | METAINDEX | CATEGORIES ADMIN | PORTAL ADMIN | MANAGE QUICKSETS | END SESSION

FIND RESOURCE | RESOURCE LIST

mladmin (ALL)

☒ Resource Name: JSTOR Arts & Sciences V Collection XML Gateway - HOPE

*Mandatory fields

Subscription | Presentation: Primary | **Presentation: Secondary** | Presentation: Library | Local | Categories

Alternative Name

Coverage

Time-Span

Languages

Link to Database Guide

Full Text Note

Notes

Publisher

Alternative Publisher Names

Publisher Description

Publisher URL

Creator

Copyright

Keywords

Resource ID: HOP01435 | Source ID: CKB03391 | Original ID: | Sysno: 000003611

NEXT TAB | SAVE | SAVE & EXIT | RESOURCE LIST | MAIN MENU | DELETE

The IRD - Presentation: Library

ExLibris MetaLib

Powered by ExLibris MetaLib

MAIN MENU | SFX ADMIN | USER INFO | STATISTICS | METAINDEX | CATEGORIES ADMIN | PORTAL ADMIN | MANAGE QUICKSETS | END SESSION

FIND RESOURCE RESOURCE LIST

mladmin (ALL)

? Resource Name: British Library Public Catalogue - HOPE

*Mandatory fields

Subscription Presentation: Primary Presentation: Secondary **Presentation: Library** Local Categories

Library System	ALEPH (Ex Libris)		
Library Address			
Library City		Library State/Province	
Library Postal Code		Library Country	United Kingdom
Library Telephone			
Library Fax			
Library e-mail			
Transportation			
Access for Disabled			
Access Policy			
Charging (Loaning) Policy			
Opening Hours URL			
Contact			
Note			

Resource ID: HOP00348 Source ID: CKB02133 Original ID: Sysno: 000002524

NEXT TAB SAVE SAVE & EXIT RESOURCE LIST MAIN MENU DELETE

The IRD - Local

 Powered by 

MAIN MENU | SFX ADMIN | USER INFO | STATISTICS | METAINDEX | CATEGORIES ADMIN | PORTAL ADMIN | MANAGE QUICKSETS | END SESSION

FIND RESOURCE | RESOURCE LIST

exlv (EXLV)

? Resource Name: ABI/INFORM Global Full Text (SP) - EXLT

Subscription

Presentation: Primary

Presentation: Secondary

Presentation: Library

Local

Categories

Local Field 1		^ v	
Local Field 2		^ v	
Local Field 3		^ v	
Local Field 4		^ v	
Local Field 5		^ v	

Resource ID: EXL01604 | Source ID: CKB01880 | Original ID: | Sysno: 000002956

NEXT TAB

SAVE

SAVE & EXIT

RESOURCE LIST

MAIN MENU

DELETE

The IRD - Categories



Powered by 

MAIN MENU | SFX ADMIN | USER INFO | STATISTICS | METAINDEX | CATEGORIES ADMIN | PORTAL ADMIN | MANAGE QUICKSETS | END SESSION

FIND RESOURCE | RESOURCE LIST

exlv (EXLV)

2 Resource Name: ABI/INFORM Global Full Text (SP) - EXLT

Mandatory fields

Subscription | Presentation: Primary | Presentation: Secondary | Presentation: Library | Local | Categories

Update Resource Categories

History 

☐ [General](#)

☐ [Geography](#)

☐ [Archaeology](#)

☐ [Africa](#)

☐ [Asia](#)

☐ [Europe](#)

☐ [North America](#)

☐ [South America](#)

View Resource Categories

Hide all Show all

Resource ID: EXL01604 | Source ID: CKB01880 | Original ID: | Sysno: 000002956

SAVE | SAVE & EXIT

Apply Changes to UI | RESOURCE LIST | MAIN MENU

CKB Hints & Notes

- **Resource Configuration Notes:**

- Set-up information for resources
- Information to localise the Authentication field and Hostname:port field
- Information about any oddities found in the resource when it was configured for MetaLib

- **Search Hints for the user:**

- Information about how the resource varies from MetaLib's standard search syntax

- **Release Notes:**

- Information about changes made as part of Central KnowledgeBase.

http://metalib-demo.exlibrisgroup.com - IRD - Mozilla Firefox

Resource Name: AGISPT - AGIS Plus Text (Informit) SCIENCE

Resource Configuration Notes

This configuration was developed for RMIT's 'Informit Search' Tera-text based system.

Enter \$856_u in the "Link to Records in Native Interface" field to link directly to the full-text from each record's resource title. The link will open a browser without navigator bars, as

Search hints for the user (CKB)

Copy Hints (CKB to Local) Search hints for the user (LOCAL)

Does not search ISBNs

Release Notes

.....	Date	Note	Manual changes needed
View	10/27/2005	Changed display and lateral searches for subjects.	None
View	12/02/2004	Change to use USMARC. This change was required due to a change made by the information vendor; ...	None
View	10/28/2004	Changed truncation of subject searches. Changed	None

Done 0.150s

Resources in the KnowledgeBase

Browse by Resource Name

Filter by: Institution: Status: ☐ All resources ☒ Active ☐ Testing ☐ Inactive

Jump to:

☐ ? CH ☐ Presentation ☐ Copy ☐ Delete ☐ Add ☐ Remove Link between IRD and Config

IRD

IRD Action	Resource name	Resource ID	Status
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (EBSCO) - CENTRAL	LKV00326	☒ A ☐ I ☐ C
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (EBSCO) - UNI1	LKV01290	☒ A ☐ I ☐ C
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (EBSCO) - UNI2	LKV01354	☒ A ☐ I ☐ C
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (EBSCO) - UNI3	LKV01418	☒ A ☐ I ☐ C
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (EBSCO) - UNI4	LKV01482	☒ A ☐ I ☐ C
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (OCLC) - CENTRAL	LKV00220	☒ A ☐ I ☐ C
☐ ? ☐ S ☐ P ☐ T ☐ D	Humanities Abstracts (OCLC) - PUB1	LKV01553	☒ A ☐ I ☐ C

Config

Configuration code	Access Method	Config Action
EBSCO_QHS	Z39	☐ ? ☐ D
EBSCO_QHS	Z39	☐ ? ☐ D
EBSCO_QHS	Z39	☐ ? ☐ D
EBSCO_QHS	Z39	☐ ? ☐ D
EBSCO_QHS	Z39	☐ ? ☐ D
OCLC_W/HUM	Z39	☐ ? ☐ D
OCLC_W/HUM	Z39	☐ ? ☐ D

The Configuration

- Configurations are required for resources to be searchable within MetaLib
- Depending on the configuration, your resource will either be:
 - Search and View
 - Search and Link
- Configurations are based on different types of access methods:
 - Z39.50
 - XML
 - HTTP
- Configurations are provided as part of the MetaLib CKB
- Tools are also available to create your own, local configs

The Configuration

Resource Name: Academic Abstracts FullTEXT Elite (EBSCO) - UNIV

Institution: METALIB **Configuration Code:** EBSCO_AEH

Restart Z39 Access Method: Z39 **Configuration Type:** Full Record

Open Date: 04/03/02 **Update Date:** 06/01/04

General | Term Transformations | Conversion | OpenURL | Sort | Applications

General Information

Field Name	Value
Version	
Outgoing character conversion	UTF_TO_8859_1
Record Type	USMARC
Format conversion program	vir_z00_z39_usmarc
Incoming character conversion	MARC8_TO_UTF
Jump to native interface (from results list)	No
Holding method	
Direct link type	
Direct Link Field Tag	
Z39 Record Type	USMARC
Elementsname	T

Resources in the KnowledgeBase

IRDs



Required for **ALL** Resources

Configurations



Required for **MetaLib Search** Resources only
Linked directly to an IRD record

MetaLib's KnowledgeBases

MetaLib consists of a two KnowledgeBases, containing all the technical and descriptive information for the resources accessed in MetaLib

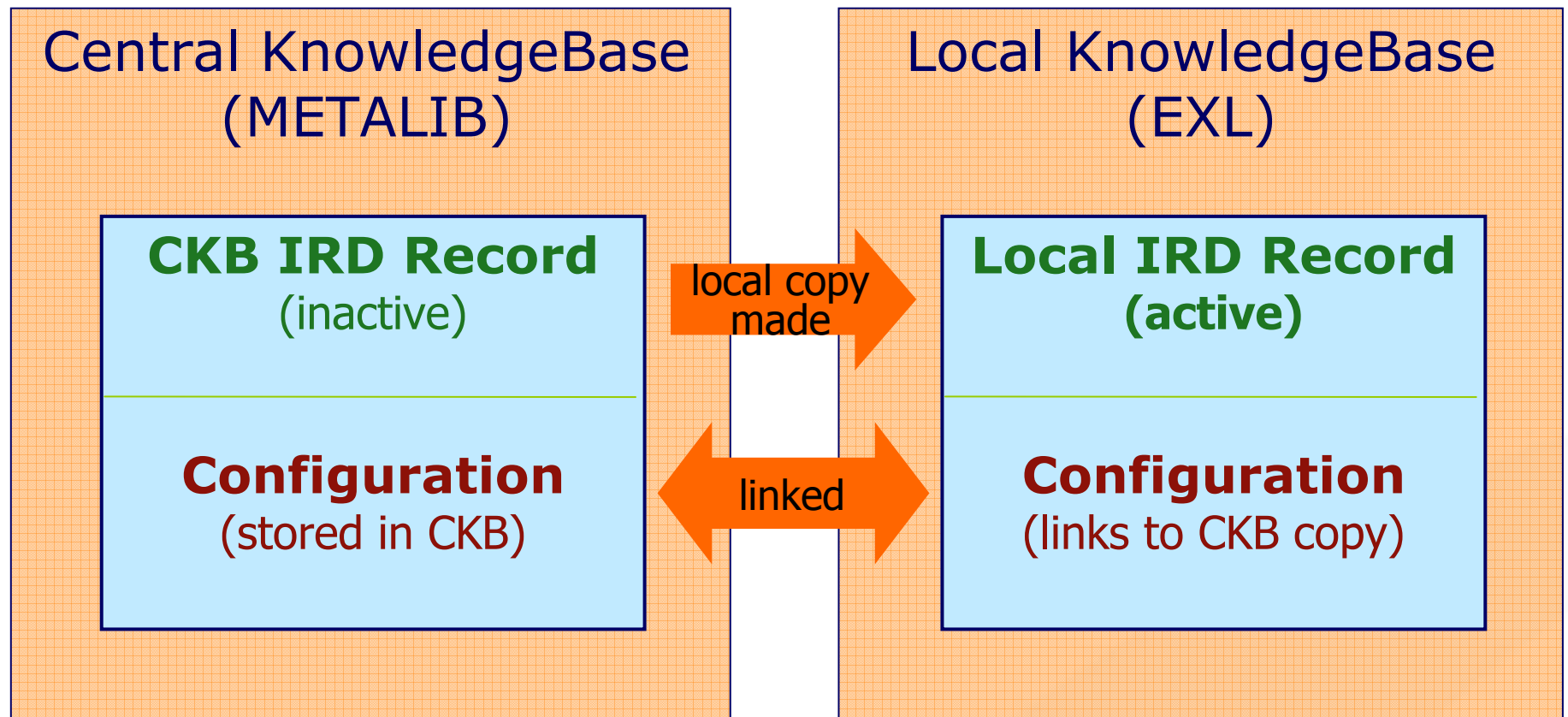
1. Central KnowledgeBase:

- Every MetaLib installation includes a copy of the CKB.
- The CKB is maintained by Ex Libris and cannot be edited by the library.
- All resources in the CKB are inactive.
- Ex Libris provide regular updates to the CKB.

2. Local KnowledgeBase:

- A local copy of the CKB is created for each institution.
- Resources in the LKB are those localised, activated and displayed to the user for searching.

MetaLib's KnowledgeBases



MetaLib's KnowledgeBases

- A copy of the CKB is always maintained in the METALIB institution
- CKB resources (owned by the METALIB institution) cannot be edited
- Institutions can edit CKB configurations by making a local copy of the config in their LKB

MetaLib's KnowledgeBases

Find Query: Name=forestry AND Publisher=sabinet

Number of resources found: 4

? CKB notes S Subscription P Presentation T Copy D Delete A Add E Edit V View
* Inactive Link between IRD and Config

Global updates:

-- Select type of update --

☒ collapse ☐ expand

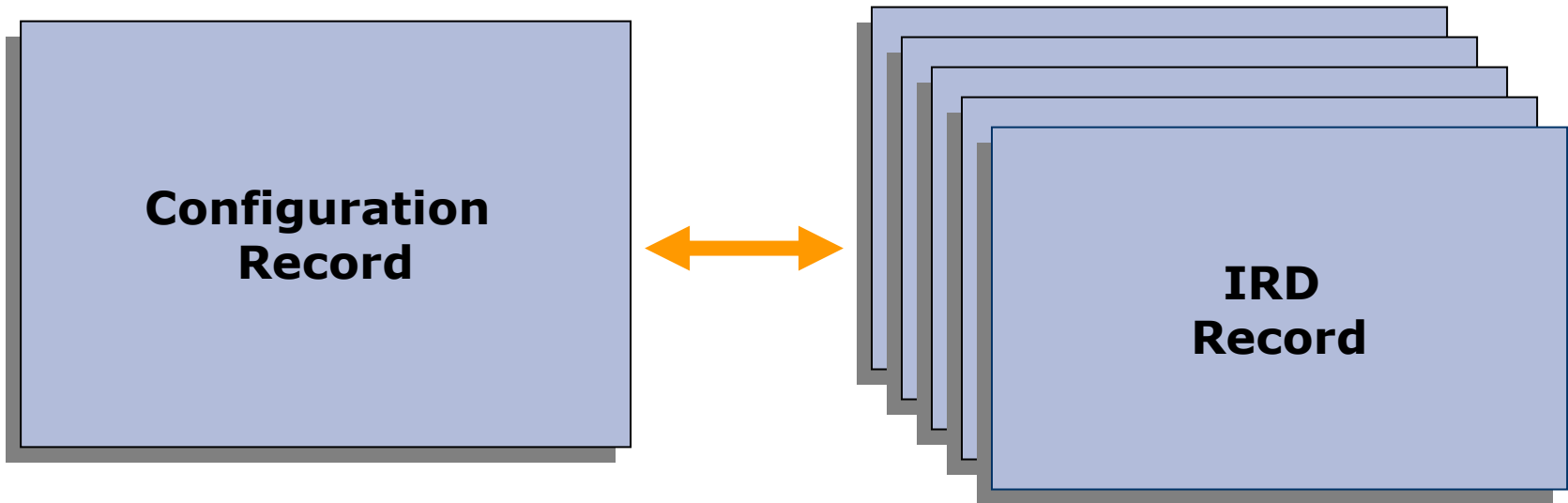
Go

[Replicate](#)
[Deselect all](#)

IRD Action	Resource name	Resource ID	Status	Configuration code	Access Method	Config Action
? ☒ ☒	Forestry (SABINET) - METALIB	CKB05391	☐ A ☒ I ☐ T	BOSB_SABINET	Z39	☒
☒ ? ☐ ☐ ☐ ☐ ☐	Forestry (SABINET) - DUT	ESL05392	☒ A ☐ I ☐ T	BOSB_SABINET	Z39	☒ ☐
☒ ? ☐ ☐ ☐ ☐ ☐	Forestry (SABINET) - MUT	ESL05437	☐ A ☒ I ☐ T	BOSB_SABINET	Z39	☒ ☐
☒ ? ☐ ☐ ☐ ☐ ☐	Forestry (SABINET) - UZ	ESL05482	☐ A ☒ I ☐ T	BOSB_SABINET	Z39	☒ ☐

MetaLib's KnowledgeBases

- Configuration records can be linked to more than one IRD Record



MetaLib's KnowledgeBases

[ADD A NEW IRD](#)

Find Query: Configuration code=PROQUEST_HTTP_XML

Number of resources found: 84

[? CKB notes](#)
[S Subscription](#)
[P Presentation](#)
[T Copy](#)
[D Delete](#)
[A Add](#)
[E Edit](#)
[V View](#)

 * Inactive Link between IRD and Config

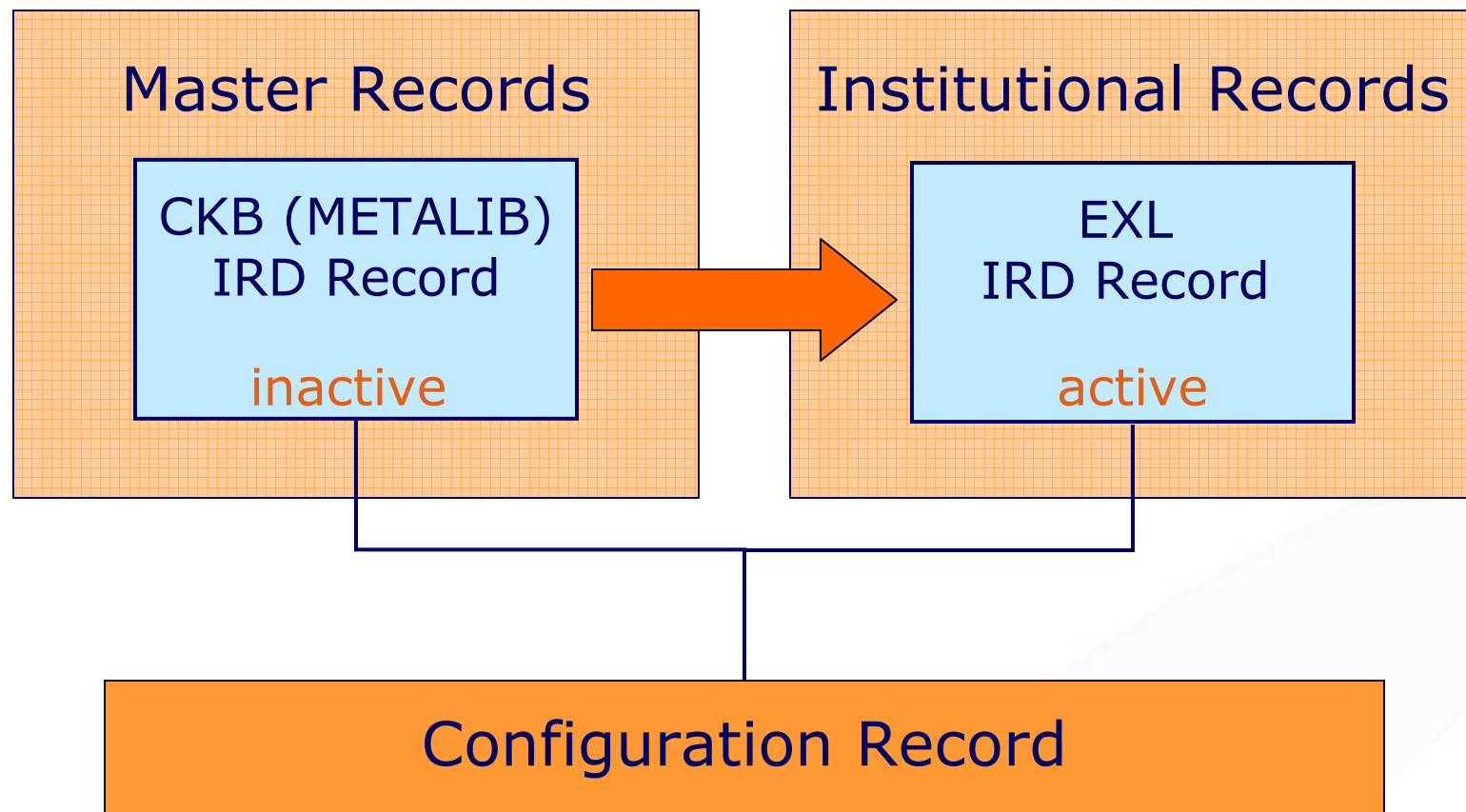
Global updates: [collapse](#) [expand](#) [Go](#)

[Replicate](#)
[Deselect all](#)

IRD Action	Resource name	Resource ID	Status	Configuration code	Access Method	Config Action
? ✓ V	ABI/INFORM Complete (ProQuest) - METALIB	CKB02686	☐ A ☒ I ☐ T	PROQUEST_HTTP_XML	WEBCONFIG_XML	
✓ ? S P T D	ABI/INFORM Complete (ProQuest) - EXLA	XLA00848	☐ A ☒ I ☐ T	PROQUEST_HTTP_XML	WEBCONFIG_XML	D
✓ ? S P T D	ABI/INFORM Complete (ProQuest) - EXLNZ	XLA01706	☐ A ☒ I ☐ T	PROQUEST_HTTP_XML	WEBCONFIG_XML	D
? ✓ V	ABI/INFORM Dateline (ProQuest) - METALIB	CKB02685	☐ A ☒ I ☐ T	PROQUEST_HTTP_XML	WEBCONFIG_XML	
✓ ? S P T D	ABI/INFORM Dateline (ProQuest) - EXLA	XLA00847	☐ A ☒ I ☐ T	PROQUEST_HTTP_XML	WEBCONFIG_XML	D
✓ ? S P T D	ABI/INFORM Dateline (ProQuest) - EXLNZ	XLA01705	☐ A ☒ I ☐ T	PROQUEST_HTTP_XML	WEBCONFIG_XML	D
? ✓ V	ABI/INFORM Global (ProQuest) - METALIB	CKB02562	☐ A ☒ I ☐ T	PROQUEST_HTTP_XML	WEBCONFIG_XML	
✓ ? S P T D	ABI/INFORM Global (ProQuest) - EXLA	XLA00724	☐ A ☒ I ☐ T	PROQUEST_HTTP_XML	WEBCONFIG_XML	D
✓ ? S P T D	ABI/INFORM Global (ProQuest) - EXLNZ	XLA01583	☐ A ☒ I ☐ T	PROQUEST_HTTP_XML	WEBCONFIG_XML	D
? ✓ V	ABI/INFORM Trade & Industry (ProQuest) - METALIB	CKB02674	☐ A ☒ I ☐ T	PROQUEST_HTTP_XML	WEBCONFIG_XML	
? ✓ V	ABI/INFORM Trade & Industry (ProQuest) - EXLA	XLA00826	☐ A ☒ I ☐ T	PROQUEST_HTTP_XML	WEBCONFIG_XML	D

MetaLib's KnowledgeBases

Single Site



Hands On



Exercise 1 – Navigation

Navigate the MetaLib KnowledgeBase

Setting up your resources

4 Steps:

1. Gather information
2. Localise, add or copy an IRD
3. Create, link or copy Configuration record
4. Activate, test & make corrections

Step 1 – Gather information

- The Central KnowledgeBase is installed with the MetaLib Software and serves as the basis for your Local KnowledgeBase
- Using the data you have gathered, you can activate and localise resources in your Local KnowledgeBase
- Resources that aren't in the CKB may be added and configured by the library

Step 1 – Gather information

	A	B	C	D	E	F	
1	LICENSED DATABASES (CKB)						
2							
3							
4	A. "Licensed" in this case means that you must subscribe to the database in order to search .						
5	B. Some databases allow free searching, but require a subscription to access content. These are listed under "Free Databases".						
6	C. We recommend that you contact each of the vendors below about their authentication requirements for federated searching.						
7							
8	INSTRUCTIONS:						
9							
10	1. Mark the resources to which you subscribe with an "X".						
11	2. Fill in the "Authentication" field with your federated searching username and password (if any).						
12	3. Fill in the "Current Link to Database" field with your current link to this database.						
13	4. If you have licensed databases not listed here, please list them under "Other Databases".						
14							
15	Subscribe? ("X")	Vendor	Database	Authentication	Current Link to Database	Off Campus	Access
19	X	ABC-Clio	Historical Abstracts	username 192; password athens	http://serials.abc-clio.com	http://serials.abc-clio.com/athens/	Full Re
36	X	British Library	Zetoc		http://zetoc.mimas.ac.uk/		Full Re
72	X	CSA	ANTE	Z39 and IP auth needed - confirmed	http://www.csa1.co.uk/htbin/dbi	http://auth.athensams.net/setorg.php?id=urn:m	Full Re
74	X	CSA	ARTbibliographies Modern	Z39 and IP auth needed - confirmed	http://www.csa1.co.uk/htbin/dbi	https://auth.athensams.net/ath%5Fdspid=CS	Full Re
76	X	CSA	ASSIA	Z39 and IP auth needed - confirmed	http://www.csa1.co.uk/htbin/dbi	https://auth.athensams.net/ath%5Fdspid=CS	Full Re
78	X	CSA	Avery Index to Architectural Periodicals	Z39 and IP auth needed - confirmed	http://www.csa1.co.uk/htbin/dbi	https://auth.athensams.net/ath%5Fdspid=CS	Full Re
84	X	CSA	British Humanities Index	Z39 and IP auth needed - confirmed	http://www.csa1.co.uk/htbin/dbi	https://auth.athensams.net/ath%5Fdspid=CS	Full Re
98	X	CSA	DAAI: Design and Applied Arts Index	Z39 and IP auth needed - confirmed	http://www.csa1.co.uk/htbin/dbi	https://auth.athensams.net/ath%5Fdspid=CS	Full Re
115	X	CSA	IMID: Institute of Management International	Z39 and IP auth needed - confirmed	http://www.csa1.co.uk/htbin/dbi	http://auth.athensams.net/setorg.php?id=urn:m	Full Re
122	X	CSA	LISA: Library and Information Science Abstracts	Z39 and IP auth needed - confirmed	http://www.csa1.co.uk/htbin/dbi	http://auth.athensams.net/setorg.php?id=urn:m	Full Re
140	X	CSA	Philosopher's Index	Z39 and IP auth needed - confirmed	http://www.csa1.co.uk/htbin/dbi	http://auth.athensams.net/setorg.php?id=urn:m	Full Re
196	X	EBSCO	Business Source Premier	Z39 auth needed	http://search.ebscohost.com/	http://search.ebscohost.com/athens.asp	Full Re
209	X	EBSCO	EconLit	Z39 auth needed	http://search.ebscohost.com/	http://search.ebscohost.com/athens.asp	Full Re
212	X	EBSCO	Electronic Journals Service	Z39 auth needed	http://ejournals.ebsco.com/ho	http://search.ebscohost.com/athens.asp	Full Re
236	X	EBSCO	Library, Information Science & Technology	Z39 auth needed	http://search.ebscohost.com/		Full Re
266	X	EBSCO	SocINDEX	Z39 auth needed	http://search.ebscohost.com/	http://search.ebscohost.com/	Full Re
					http://search.ebscohost.com/athens.asp		
282	X	EDINA	Land, Life & Leisure		http://search.ebscohost.com/athens.asp		Full Re
284	X	Elsevier	ScienceDirect	XML auth needed - Account Id 10139	http://www.sciencedirect.com/		Full Re
		Elsevier Engineering			http://www.engineeringvillage2.co		Full Re

Setting up your resources

4 Steps:

1. Gather information
2. Localise, add or copy an IRD
3. Create, link or copy Configuration record
4. Activate, test & make corrections

Step 2 – Localise, add or copy IRD

Localising a resource

When the resource is included in the CKB and has automatically been copied across to your LKB during an Update.

The screenshot displays the 'RESOURCE LIST' interface in ExLibris MetaLib. The resource being configured is 'ABI/INFORM Global Full Text (SP) - EXLT'. The interface includes a navigation bar with links like 'MAIN MENU', 'SFX ADMIN', 'USER INFO', 'STATISTICS', 'METAINDEX', 'CATEGORIES ADMIN', 'PORTAL ADMIN', 'MANAGE QUICKSETS', and 'END SESSION'. Below the navigation bar, there are tabs for 'Subscription', 'Presentation: Primary', 'Presentation: Secondary', 'Presentation: Library', 'Local', and 'Categories'. The 'Subscription' tab is active. The form contains various fields for resource configuration, including 'Full Name', 'Display Name', 'Institution', 'Secondary Affiliation', 'IP Filter', 'Configuration Code', 'Free/By Subscription', 'Link to Native Interface URL', 'Proxy Server Flag', 'Search Proxy Server Flag', 'Hostname:Port', 'Database Code', 'Authentication', 'Link to Records in Native Interface', and 'Number of Sessions'. Some fields are marked as mandatory with an asterisk (*). The 'Institution' field is set to 'Ex Libris Timm'. The 'Configuration Code' is 'SILVER_UMAF'. The 'Free/By Subscription' is set to 'Subscription'. The 'Database Code' is 'UMAF*'. The 'Link to Records in Native Interface' field is empty.

Field	Value
Full Name	ABI/INFORM Global Full Text (SP)
Display Name	ABI/INFORM Full Text (SP)
Institution	Ex Libris Timm
Secondary Affiliation	
IP Filter	
Configuration Code	SILVER_UMAF
Free/By Subscription	Subscription
Link to Native Interface URL	
Proxy Server Flag	☐ No need for proxy server ☐ Use proxy server
Search Proxy Server Flag	☐ No need for search proxy server ☐ Use search proxy server
Hostname:Port	
Database Code	UMAF*
Authentication	
Link to Records in Native Interface	
Number of Sessions	

Step 2 – Localise, add or copy IRD

Localising a resource

Names

Secondary affiliation (group)

IP filter

Link to native interface

Proxy Server flag

Hostname:Port

Database Code

Authentication

Link to records in interface

Cataloguers note

Alternative Links

Primary Presentation

Secondary Presentation

Library Presentation

The screenshot shows the 'Localising a resource' form in the ExLibris Metalib interface. The form is titled 'Resource Name: ABI/INFORM Global Full Text (SP) - EXLT' and includes a 'Mandatory fields' section. The form is divided into several tabs: 'Subscription', 'Presentation: Primary', 'Presentation: Secondary', 'Presentation: Library', 'Local', and 'Categories'. The 'Subscription' tab is currently selected. The form contains the following fields:

- Full Name**: * ABI/INFORM Global Full Text (SP)
- Display Name**: * ABI/INFORM Full Text (SP)
- Institution**: * Ex Libris Timm
- Secondary Affiliation**: [Text field] [List of user groups](#)
- IP Filter**: [Text field] [List of IP filters](#)
- Configuration Code**: SILVER_UMAF
- Free/By Subscription**: Subscription
- Link to Native Interface URL**: [Text field]
- Proxy Server Flag**: ☐ No need for proxy server ☐ Use proxy server
- Search Proxy Server Flag**: ☐ No need for search proxy server ☐ Use search proxy server
- Hostname:Port**: [Text field]
- Database Code**: UMAF*
- Authentication**: [Text field]
- Link to Records in Native Interface**: [Text field]
- Number of Sessions**: [Text field]

Step 2 – Localise, add or copy IRD

Localising a resource

Categories

Two panes

- Left: update categories
- Right: View categories

For updating the resource categories

- Select categories
- Assign sub-categories to the current resource

Resource Name: ABI/INFORM Global Full Text (SP) - EXLT

*Mandatory fields

Subscription Presentation: Primary Presentation: Secondary Presentation: Library Local **Categories**

Update Resource Categories

Science ▼

☒ [Biology](#)

☒ [Chemistry](#)

☐ [Computer Science](#)

☒ [Medicine](#)

☒ [Physics](#)

View Resource Categories

[Hide all](#) [Show all](#)

☐ History

- [Geography](#)
- [Archaeology](#)
- [Asia](#)
- [Europe](#)

☐ Science

- [Biology](#)
- [Chemistry](#)
- [Medicine](#)
- [Physics](#)

Resource ID: EXL01604 Source ID: CKB01880 Original ID: Sysno: 000002956

[SAVE](#) [SAVE & EXIT](#) [Apply Changes to UI](#) [RESOURCE LIST](#) [MAIN MENU](#)

Step 2 – Localise, add or copy IRD

Update or Activate Resources

- New feature for external update resources in 3 steps:
 - Export IRD's to an Excel sheet
 - Updating the data in Excel
 - Re-import with the changes

Step 2 – Localise, add or copy IRD

Update or Activate Resources

Why?

- Ideal for activating resources in new institutions
- Easier to update multiple resources using Excel
- Excel sort by vendor/status etc
- More fields than the global update

Step 2 – Localise, add or copy IRD

Update or Activate Resources

- Step 1 – Export
 - Choose institution
 - Select specific fields to export
 - Enter email address
- Important notes:
 - Works for one institution at a time
 - Exports the entire LKB (or CKB in MetaLib institution)
 - Available in the Initial & Ongoing Menus

Step 2 – Localise, add or copy IRD

Update or Activate Resources

- Step 2 – Excel update
 - Save file from url in email
 - Choose what resources/fields to update
 - Fields made blank will overwrite existing information

From: Metalib@librarysearch.ucd.ie
To: Leonard Wright
Cc:
Subject: Import Loader Report

Sent: Mon 08/06/2009 17:03

The attached file contains the results of your query

Institute name : METALIB

To view the results please click on the following link:

<http://librarysearch.ucd.ie:80/exlibris/metalib/m4 2/tmp/ckb export 2009060817059.xls>

Instructions for use:

- i. Click on the enclosed link and open the file or save it to your PC.
- ii. Save the file to your PC as "Unicode text" type (.txt suffix) to be able to upload this file to Metalib.
- iii. Use "Upload File" browse option to upload this file (or other .txt files) to Metalib.

This is an automated response. Please do not respond to this message. For questions concerning the report, please use the CRM application.

Regards,

The Metalib Team

Step 2 – Localise, add or copy IRD

Update or Activate Resources

- Step 3 – Reupload
 - Save file as Unicode
 - Only rows in file will update
 - Get email report

From: metalib@librarysearch.ucd.ie
To: Leonard Wright
Cc:
Subject: MetaLib Knowledge Base Import by Table 2: Mon Jun 8 17:27:01 IST 2009

Sent: Mon 08/06/2009 17:27

Table2 Import Report

TOTAL IRDs in input file: 153
TOTAL IRDs imported to XML format: 153
The following IRD records were rejected:

LOADING STAGE:

↑

Total Records Loaded to local Institute :000000153 Total Records Rejected from Batch Load :000000000

Step 2 – Localise, add or copy IRD

Update or Activate Resources

The screenshot displays the ExLibris MetaLib administrative interface. At the top, the logo 'ExLibris MetaLib' is on the left, and 'Powered by ExLibris MetaLib' is on the right. Below the logo is a navigation bar with links: MAIN MENU, SFX ADMIN, USER INFO, STATISTICS, METAINDEX, CATEGORIES ADMIN, MANAGE QUICKSETS, and END SESSION. Below this bar are two buttons: FIND RESOURCE and RESOURCE LIST. A yellow banner below the buttons displays 'mladmin (ALL)'. The main content area is titled 'Initial Menu' and is divided into two columns. The left column, 'MetaLib Tools', contains a list of options: Resource Cataloging and Configuration (with sub-options Find a Resource, Browse List of Resources, and Add a New Resource), CKB Update, and Restart Z39 Gate. The right column, 'Configuring your MetaLib Installation', contains a list of options: Institutional Settings, Portal Administration, Update or Activate Resources (highlighted with a red rectangle), Define Default Profiles, QuickSets, Categories, Staff Users, List of Users, Portal Look and Feel, PDS, and Set Ongoing as Default. At the bottom left of the main content area is a button labeled 'GO TO ONGOING MENU'.

ExLibris MetaLib

Powered by ExLibris MetaLib

MAIN MENU | SFX ADMIN | USER INFO | STATISTICS | METAINDEX | CATEGORIES ADMIN | MANAGE QUICKSETS | END SESSION

FIND RESOURCE | RESOURCE LIST

mladmin (ALL)

Initial Menu

MetaLib Tools

- Resource Cataloging and Configuration
 - Find a Resource
 - Browse List of Resources
 - Add a New Resource
- CKB Update
- Restart Z39 Gate

Configuring your MetaLib Installation

- Institutional Settings
- Portal Administration
- **Update or Activate Resources**
- Define Default Profiles
- QuickSets
- Categories
- Staff Users
- List of Users
- Portal Look and Feel
- PDS
- Set Ongoing as Default

GO TO ONGOING MENU

Step 2 – Localise, add or copy IRD

Update or Activate Resources

ExLibris MetaLib

Powered by ExLibris MetaLib

MAIN MENU | SFX ADMIN | USER INFO | STATISTICS | METAINDEX | CATEGORIES ADMIN | PORTAL ADMIN | MANAGE QUICKSETS | END SESSION

FIND RESOURCE | RESOURCE LIST

mladmin (ALL)

Activate Resources

Institution Code:

Additional IRD fields	Selected fields for export
☐ Hostname:Port	☐ Resource Name
☐ Database Code	☐ Resource ID
☐ Link to URL	☒ Hostname:Port
☐ Free / Subscription	☐ Link to URL
☐ Description	☐ Database Code
☐ Publisher	☐ Description
☐ Status	☐ Keywords
☐ Authentication	
☐ Keywords	
☐ Notes	
☐ Proxy Server Flag	
☐ Search Proxy Server	

E-mail address:

SUBMIT

Upload File

Please specify a file

E-mail address:

SUBMIT

Step 2 – Localise, add or copy IRD

Adding URLs to IRD fields

- It is possible to add URLs to selected descriptive fields in a resource's IRD
- URLs can be added to various IRD fields, for example:
 - Presentation: Primary – Description
 - Presentation: Secondary – Alternative name
- **For a complete list of the relevant IRD fields, please refer to the Resource Management Guide**

Step 2 – Localise, add or copy IRD

Adding URLs to IRD fields

- Two ways to implement:
 - 1) Linkable descriptive text (URL not shown):
 - Output:
“[United States National Library of Medicine \(NLM\)](http://www.nlm.nih.gov)”,
where the text itself is a link to
www.nlm.nih.gov
- Syntax:
“@@U<http://www.nlm.nih.gov>@@DUnited States National
Library of Medicine (NLM)@@E”.

Step 2 – Localise, add or copy IRD

Adding URLs to IRD fields

- Two ways to implement:
 - 2) URL within a description (URL shown):
 - Output:
“Pubmed was developed
by NLM www.nlm.nih.gov in 1967...”
- Syntax:
“Pubmed was developed
by NLM @@Uhttp://www.nlm.nih.gov@@D@@E in
1967...”.

Hands On



Exercise 2 – Localising KB records

Localise a record in your Local
KnowledgeBase

Step 2 – Localise, add or copy IRD

Localising a resource

Global Updates - Allow changes to more than one IRD at a time

[ADD A NEW IRD](#)

Find Query: **Institution=COLST AND Status=ACTIVE AND Publisher=csa**
Number of resources found: 74

[? CKB notes](#) [S Subscription](#) [P Presentation](#) [T Copy](#) [D Delete](#) [A Add](#) [E Edit](#) [V View](#)
* Inactive Link between IRD and Config

Global updates: [Replicate](#) [Deselect all](#)

-- Select type of update --
-- Select type of update --
Change Status
Change Authentication
Change Hostname:Port
Change Link to Native Interface URL
Change Link to Records
Change Link to Configurations
Switch to CKB Configuration
Switch to a different Configuration code

[collapse](#) [expand](#)

IRD Action	Resource	Resource ID	Status	Configuration code
☒ ? S P T D	Aerospace +	EXL03849	☒ A ☐ I ☐ O ☐ T	
☒ ? S P T D	Aerospace + High Technology Database (CSA) - COLST	EXL03409	☒ A ☐ I ☐ O ☐ T	CSA AEROSPACE
☒ ? S P T D	AgeLine (CSA) - COLST	EXL03376	☒ A ☐ I ☐ O ☐ T	CSA AGE LINE
☒ ? S P T D	AGRICOLA (CSA) - COLST	EXL03351	☒ A ☐ I ☐ O ☐ T	CSA AGRICOLA

Step 2 – Localise, add or copy IRD

Localising a resource

Global Update Examples:

- Ebsco changed the address of their Z39.50 server. All Ebsco resources update in 1 go
- A vendor's site is temporarily unavailable. Change IRDs or configurations Inactive.
- Add authentication string to all CSA databases
- A CKB Update releases a new configuration for a resource used by 20 of your institutions. Use "Global Updates" to switch all IRDs to the CKB configuration.

Step 2 – Localise, add or copy IRD

Localising a resource

Global Update – Change status

The screenshot shows the MetaLib web interface for the 'Global Update – Change status' task. At the top, there is a navigation bar with links: MAIN MENU, SFX ADMIN, USER INFO, STATISTICS, METAINDEX, and END SESSION. Below this is a blue bar with buttons: FIND RESOURCE, RESOURCE LIST, and HELP. A yellow banner below the navigation bar reads 'exlibris (METALIB)'. The main content area is titled 'Change Status' and displays the message: 'Number of resources found: 65. You are authorized to edit 65.' Below this is a table with three columns: 'No. of Resources', 'Existing Status', and 'Change to this Status'. The table contains one row with the value '65' in the first column, 'ACTIVE' in the second, and radio buttons for 'TEST' and 'INACTIVE' in the third. A 'SUBMIT' button is located to the right of the table. Below the table is a 'Change Status' dropdown menu, followed by 'collapse' and 'expand' radio buttons, and a 'Go' button. At the bottom left, there is a 'RESOURCE LIST' button.

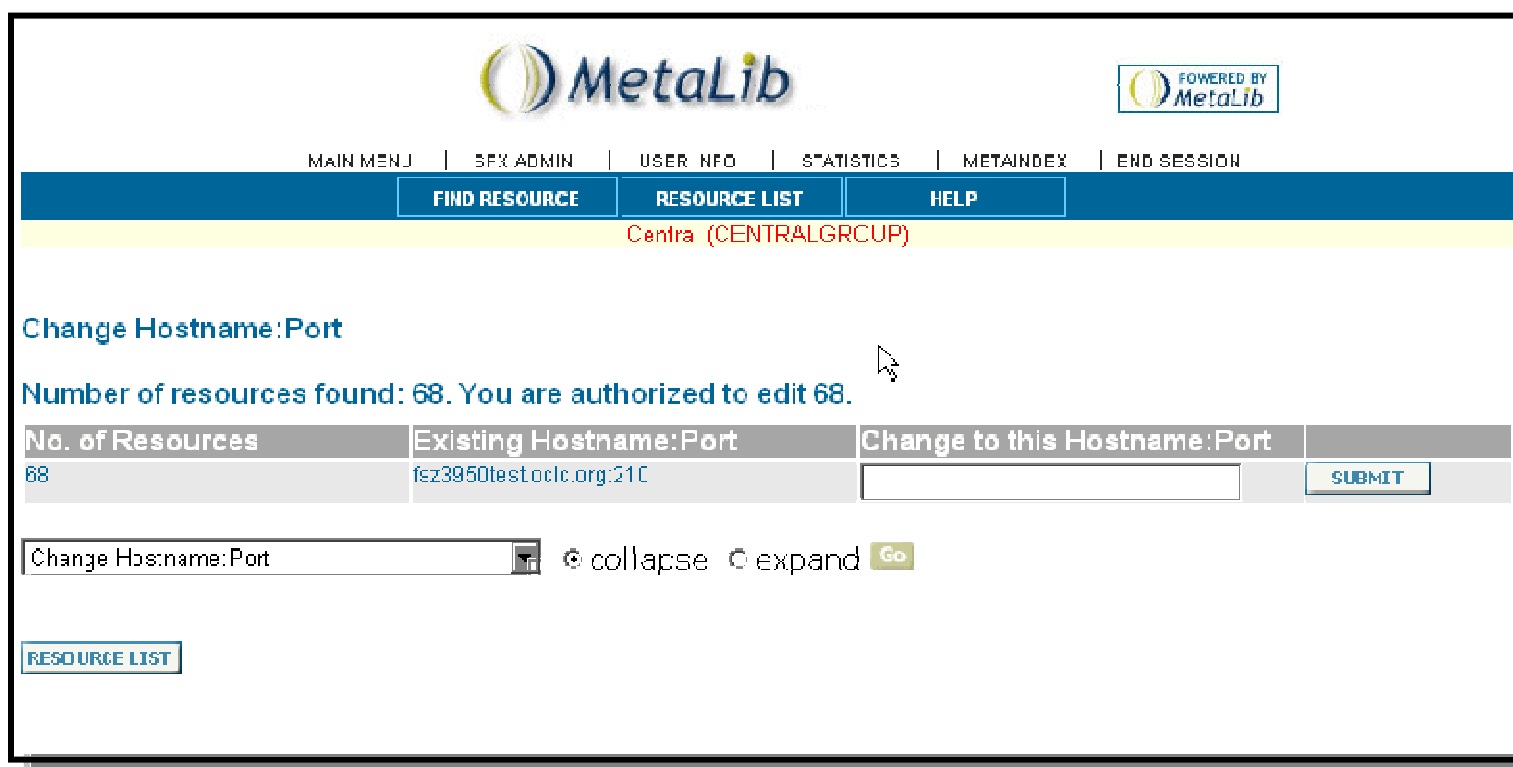
No. of Resources	Existing Status	Change to this Status
65	ACTIVE	☐ TEST ☐ INACTIVE

Change Status

Step 2 – Localise, add or copy IRD

Localising a resource

Global Update – Change Hostname:Port



The screenshot shows the MetaLib web interface for the 'Global Update – Change Hostname:Port' function. The header includes the MetaLib logo, a 'POWERED BY MetaLib' badge, and a navigation menu with links: MAIN MENU, SPX ADMIN, USER INFO, STATISTICS, METAINDEX, and END SESSION. Below the menu is a blue bar with buttons for FIND RESOURCE, RESOURCE LIST, and HELP. A yellow banner displays 'Centra (CENTRALGRCUP)'. The main content area is titled 'Change Hostname:Port' and states 'Number of resources found: 68. You are authorized to edit 68.' Below this is a table with three columns: 'No. of Resources', 'Existing Hostname:Port', and 'Change to this Hostname:Port'. The first row shows '68' resources with the existing hostname 'fez3950test.oclc.org:210'. To the right of the table is a 'SUBMIT' button. Below the table is a search bar with the text 'Change Hostname:Port', a 'Go' button, and links to 'collapse' and 'expand' the table. At the bottom left is a 'RESOURCE LIST' button.

No. of Resources	Existing Hostname:Port	Change to this Hostname:Port
68	fez3950test.oclc.org:210	

Change Hostname:Port [collapse](#) [expand](#)

[RESOURCE LIST](#)

Step 2 – Localise, add or copy IRD

Localising a resource

Global Update – Expand View



MAIN MENU | SFX ADMIN | USER INFO | STATISTICS | METAINDEX | END SESSION

FIND RESOURCE | RESOURCE LIST | HELP

Central (CENTRALGROUP)

Change Hostname:Port

Number of resources found: 4. You are authorized to edit 4.

Resource ID	Existing Hostname:Port	Institution	Secondary Affiliation	Change to this Hostname:Port	
LKV00324	204.179.122.51:2990	CENTRAL			SUBMIT
LKV00592	204.179.122.51:2990	CENTRAL			SUBMIT
LKV00281	204.179.122.51:2990	CENTRAL			SUBMIT
LKV00248	fsz3950test.oclc.org:210	CENTRAL			SUBMIT
	Change all:				SUBMIT

Step 2 – Localise, add or copy an IRD

Adding a resource

- If resource is not in the CKB you can add it locally
- Used for “Search & link” resources
- Used for “Link only” resources

Step 2 – Localise, add or copy an IRD

Adding a resource

ExLibris MetaLib

Powered by ExLibris MetaLib

MAIN MENU | SFX ADMIN | USER INFO | STATISTICS | METAINDEX | CATEGORIES ADMIN | PORTAL ADMIN | MANAGE QUICKSETS | EN

FIND RESOURCE | RESOURCE LIST

mladmin (ALL)

Ongoing Menu

MetaLib KnowledgeBase

- Resource Cataloging and Configuration
 - Find a Resource
 - Browse List of Resources
 - Add a New Resource
 - View Resources Added in CKB Update
 - View Resources Changed in CKB Update
 - Update or Activate Resources
- Export-Import Procedures
- Restart Z39 Gate

MetaLib Administration

- Set-Up
 - Institutional Settings
 - Portal Administration
 - Define Default Profiles
 - Manage QuickSets
 - Categories Administration
- Staff Administration
- User Administration
 - Register Users
 - List of Users
- Portal Look and Feel

Step 2 – Localise, add or copy an IRD

Adding a resource

Browse by Resource Name

Filter by: Institution: Status: ☐ All resources ☒ Active ☐ Testing ☐ Inactive

Jump to:

[CKB notes](#) [Subscription](#) [Presentation](#) [Copy](#) [Delete](#) [Add](#) [Edit](#) [View](#)
 * Inactive Link between IRD and Config

IRD Action	Resource name	Resource ID	Status	Configuration code	Access Method	Config Action
? S P T D	Humanities Abstracts (EBSCO) - CENTRAL	_KV00328	☒ A ☐ I ☐ T	EBSCO_QHS	Z39	V D
? S P T D	Humanities Abstracts (EBSCO) - JN11	_KV01290	☒ A ☐ I ☐ T	EBSCO_QHS	Z39	V D
? S P T D	Humanities Abstracts (EBSCO) - JN12	_KV01354	☒ A ☐ I ☐ T	EBSCO_QHS	Z39	V D
? S P T D	Humanities Abstracts (EBSCO) - JN13	_KV01418	☒ A ☐ I ☐ T	EBSCO_QHS	Z39	V D
? S P T D	Humanities Abstracts (EBSCO) - JN14	_KV01482	☒ A ☐ I ☐ T	EBSCO_QHS	Z39	V D
? S P T D	Humanities Abstracts (OCLC) - CENTRAL	_KV00220	☒ A ☐ I ☐ T	OCLC_WHUM	Z39	V D
? S P T D	Humanities Abstracts (OCLC) - PJB1	_KV01553	☒ A ☐ I ☐ T	OCLC_WHUM	Z39	V D

Step 2 – Localise, add or copy an IRD

Adding a resource

ExLibris MetaLib Powered by ExLibris MetaLib

MAIN MENU | SFX ADMIN | USER INFO | STATISTICS | METAINDEX | CATEGORIES ADMIN | PORTAL ADMIN | MANAGE QUICKSETS | END SESSION

FIND RESOURCE RESOURCE LIST

mldadmin (ALL)

Resource Name: - HOPE

*Mandatory fields

Subscription Presentation: Primary Presentation: Secondary Presentation: Library Local Categories

Full Name *

Display Name *

Institution * Liverpool Hope University [List of user groups](#)

Secondary Affiliation [List of user groups](#)

IP Filter [List of IP filters](#)

Configuration Code

Free/By Subscription

Link to Native Interface URL

Proxy Server Flag ☐ No need for proxy server ☐ Use proxy server

Search Proxy Server Flag ☐ No need for search proxy server ☐ Use search proxy server

Hostname:Port

Database Code

Authentication

Link to Records in Native Interface

Number of Sessions

Cataloger's Note

Verde Indicator ☐

Verde Access Type

Version

Region

Entry Date (YYYYMMDD)

Last Update (YYYYMMDD)

Alternative Link to Native Interface URL

Alternative Link to Records in Native Interface

Resource ID: HOP02129 Source ID: Original ID: Sysno: 000004305

NEXT TAB SAVE SAVE & EXIT RESOURCE LIST MAIN MENU DELETE

Hands On



Exercise 3 – Add a resource

Add a resource to your Local KnowledgeBase

Step 2 – Localise, add or copy IRD

Copying a resource

- Two types of Copy
 - Template – Uses the IRD as a template for a different resource within the same institution
 - Replicate – Makes copy of same IRD to different institutions
- Template Copy is available via the  button on Browse and Find lists

Step 2 – Localise, add or copy IRD

Template:

Uses the IRD as a template for a different resource within the same institution

Copying a resource

ADD A NEW IRD

Find Query: Institution=EXLA AND Name=template
Number of resources found: 28

[CKB notes](#) [Subscription](#) [Presentation](#) [Copy](#) [Delete](#) [Add](#) [Edit](#) [View](#)
* Inactive Link between IRD and Config

Global updates: [collapse](#) [expand](#) [Go](#)

[Replicate](#)
[Deselect all](#)

IRD Action	Resource name	Resource ID	Status	Configuration code	Access Method	Config Action
☒ ? S P T D	DigiTool Demo - Template - EXLA	XLA00142	☐ A ☒ I ☐ T	DIGITOOL	ALEPH_X	V D
☒ ? S P T D	Google Image Search Template - EXLA	XLA00527	☐ A ☒ I ☐ T	GOOGLE_IMAGE	WEBCONFIG_COMPLETE	D
☒ ? S P T D	Internet Securities, Inc. - Emerging Market Information service - EMIS - TEMPLATE - EXLA	XLA00855	☐ A ☒ I ☐ T	INTERNET_SECURITIES	WEBCONFIG_XML	D
☒ ? S P T D	ProQuest Newspapers Template (ProQuest) - EXLA	XLA00839	☐ A ☒ I ☐ T	PROQUEST_NEWSPAPERS	WEBCONFIG_XML	D
☒ ? S P T D	SIRSI TEMPLATE for catalogs with COSATI records (Sirsi) - EXLA	XLA00845	☐ A ☒ I ☐ T	SIRSI	EXTERNAL	V D
☒ ? S P T D	TEMPLATE Advance (GEAC) - EXLA	XLA00613	☐ A ☒ I ☐ T	OPAC_ADVANCE_TEMP	Z39	V D
☒ ? S P T D	TEMPLATE ALEPH using ALEPH X-Server - EXLA	XLA00610	☐ A ☒ I ☐ T	OPAC_ALEPH_TEMP	ALEPH_X	V D
☒ ? S P T D	TEMPLATE Archivalware (PTFS) - EXLA	XLA00417	☐ A ☒ I ☐ T	TEMPLATE_PTFS_AW	WEBCONFIG_COMPLETE	D
☒ ? S P T D	TEMPLATE (CSA) - EXLA	XLA00311	☐ A ☒ I ☐ T	CSA_TEMPLATE	Z39/SUTRS	V D

Step 2 – Localise, add or copy IRD

Replicate:

Allows a Central Administrator to ‘push’ IRDs to one or more institutions

Copying a resource

[ADD A NEW IRD](#)

Find Query: **Institution=EXLA AND Name=template**
Number of resources found: 28

[? CKB notes](#) [Subscription](#) [Presentation](#) [Copy](#) [Delete](#) [Add](#) [Edit](#) [View](#)
* Inactive Link between IRD and Config

Global updates: [collapse](#) [expand](#) [Go](#)

[Replicate](#)
[Deselect all](#)

IRD Action	Resource name	Resource ID	Status	Configuration code	Access Method	Config Action
☒ ? CKB notes Subscription Presentation Copy Delete Add Edit View	DigiTool Demo - Template - EXLA	XLA00142	☐ A ☒ I ☐ T	DIGITOOL	ALEPH_X	V D
☒ ? CKB notes Subscription Presentation Copy Delete Add Edit View	Google Image Search Template - EXLA	XLA00527	☐ A ☒ I ☐ T	GOOGLE_IMAGE	WEBCONFIG_COMPLETE	D
☒ ? CKB notes Subscription Presentation Copy Delete Add Edit View	Internet Securities, Inc. - Emerging Market Information service - EMIS - TEMPLATE - EXLA	XLA00855	☐ A ☒ I ☐ T	INTERNET_SECURITIES	WEBCONFIG_XML	D
☒ ? CKB notes Subscription Presentation Copy Delete Add Edit View	ProQuest Newspapers Template (ProQuest) - EXLA	XLA00839	☐ A ☒ I ☐ T	PROQUEST_NEWSPAPERS	WEBCONFIG_XML	D
☒ ? CKB notes Subscription Presentation Copy Delete Add Edit View	SIRSI TEMPLATE for catalogs with COSATI records (Sirsi) - EXLA	XLA00845	☐ A ☒ I ☐ T	SIRSI	EXTERNAL	V D
☒ ? CKB notes Subscription Presentation Copy Delete Add Edit View	TEMPLATE Advance (GEAC) - EXLA	XLA00613	☐ A ☒ I ☐ T	OPAC_ADVANCE_TEMP	Z39	V D
☒ ? CKB notes Subscription Presentation Copy Delete Add Edit View	TEMPLATE ALEPH using ALEPH X-Server - EXLA	XLA00610	☐ A ☒ I ☐ T	OPAC_ALEPH_TEMP	ALEPH_X	V D
☒ ? CKB notes Subscription Presentation Copy Delete Add Edit View	TEMPLATE Archivalware (PTFS) - EXLA	XLA00417	☐ A ☒ I ☐ T	TEMPLATE_PTFS_AW	WEBCONFIG_COMPLETE	D
☒ ? CKB notes Subscription Presentation Copy Delete Add Edit View	TEMPLATE (CSA) - EXLA	XLA00311	☐ A ☒ I ☐ T	CSA_TEMPLATE	Z39/SUTRS	V D
☒ ? CKB notes Subscription Presentation Copy Delete Add Edit View	TEMPLATE (EBSCO) - EXLA	XLA00303	☐ A ☒ I ☐ T	EBSCO_TEMPLATE	Z39	V D

Thank You!

leonard.wright@exlibrisgroup.com

