



USER DOCUMENTATION

MetaLib 4.3 KnowledgeBase Exercises

Expania, 17 June 2009

CONFIDENTIAL INFORMATION

The information herein is the property of Ex Libris Ltd. Or its affiliates and any misuse or abuse will result in economic loss. DO NOT COPY UNLESS YOU HAVE BEEN GIVEN SPECIFIC WRITTEN AUTHORIZATION FROM EX LIBRIS LTD.

This document is provided for limited and restricted purposes in accordance with a binding contract with Ex Libris Ltd. or an affiliate. The information herein includes trade secrets and is confidential.

DISCLAIMER

The information in this document will be subject to periodic change and updating. Please confirm that you have the most recent documentation. There are no warranties of any kind, express or implied, provided in this documentation, other than those expressly agreed upon in the applicable Ex Libris contract.

Any references in this document to non-Ex Libris websites are provided for convenience only and do not in any manner serve as an endorsement of those Web sites. The materials at those Web sites are not part of the materials for this Ex Libris product and Ex Libris has no liability for materials on those websites.

Copyright Ex Libris Limited, 2009. All rights reserved.

Documentation produced April 2009.

Web address: <http://www.exlibrisgroup.com>

Login information

Logins have been created for both /M and /V with username training[1-14] and password the same. You will be allocated which number account to use.

Management Interface

http://sfx2.greendata.es:8331/M

My login name and password is:

User Interface:

http://sfx2.greendata.es:8331/V

My login name and password is:

Server connections:

For training and implementation enquiries:

Mail to: leonard.wright@exlibrisgroup.com

Direct line: +44 (0) 1895 823863

Postal address: Leonard Wright, Systems Consultant, Ex Libris (UK) Ltd, 1 Long Room, Coppermill Lock, Park Lane, Harefield, Middlesex UB9 6JA

Support queries are via our CRM system at www.exlibrisgroup.com

Exercise 1: Navigate the MetaLib KnowledgeBase

Log into the Management Interface

Browse List of Resources:

1. Select 'Browse list of resources' from the Main Menu (or use the 'Resource List' tab)
 - a. This will present a list of active resources for your institution
2. Use the filter to view inactive resources for your institution
 - a. Note that you have read/write access for both IRDs and configurations
3. Use the filter to view all inactive resources for the MetaLib institution (CKB)
 - a. Note that you have read-only access for both IRDs and configurations
4. Jump to resources starting with the letter D

Find a Resource:

1. Select 'Find a resource' from the Main Menu (or use the 'Find Resource' tab)
2. View all 'testing' resources for your institution
3. View all 'inactive' resources available to Guest users
4. Find all 'inactive' resources with 'science' in the title
5. Find Annual reviews
 - a. What access method is used for the resource Annual Reviews?

 - b. What is the address of the z39.50 server for this resource?

 - c. What CKB Notes are provided for this resource?

 - d. Is the resource free or subscription based?
6. How many inactive resources have the word 'pharm?' anywhere in the record? (hint: ? is used by MetaLib as a truncation symbol)

7. How many resources use the configuration PROQUEST_HTTP_XML?

8. How many free resources are available in the CKB?

9. How many templates are available in the CKB? (Hint: template appears in the resource name)

10. How many library catalogues are available in the CKB? (Hint: Look at resource type)

11. How many Informit resources are available in the CKB? (Hint: Informit is a publisher)

12. Which resource has the Resource ID DEM12686?

13. Which resource has the Resource ID CKB03247?
 - a. What is the database code for this resource?

 - b. What access method is used?

 - c. Check the CKB Notes for this resource

 - d. Click on the Resource ID link to see if your institution has a local copy of this resource in the LKB

14. Look at these resources and see how they require different authentication and see what fields have been populated in the IRD:
 - a. Westlaw.es Premium Service
 - b. Aqualine (CSA)
 - c. JSTOR Arts & Sciences I Collection
 - d. ScienceDirect (Elsevier)

Exercise 2: Localise a record in your Local KnowledgeBase

Log into the Management Interface

Localise resources in your LKB:

1. Search your Local KnowledgeBase for the resources below
2. Check the CKB Notes for this resource
3. Go to the Subscription Tab and check/localise the IRD, based on information in your spreadsheet
 - a. Display Name
 - b. Link to Native Interface
 - c. Hostname:Port
 - d. Database Code
 - e. Authentication (username/password)
 - f. Cataloguers note : Localised – 15 June 2009
 - g. For free and free to search resources, the authentication field should be left blank, and secondary affiliation set to GUEST
 - h. For IP authentication, leave authentication field blank
4. Move to the other IRD Presentation Tabs (Primary, Secondary, Library) and localise as required
5. Change status of IRD to 'Testing'
6. Save the IRD

Name	Authentication
Copac	FREE
Keesing's World News Archive	FREE
AGRIS (FAO)	FREE TO SEARCH
SPIE Digital Library	FREE
British Library Public Catalog	FREE
PubMed	FREE
SpringerBook	FREE TO SEARCH
Google Book Search	FREE
Cochrane Library - About the Cochrane Collaboration	FREE TO SEARCH
Google Image Search	FREE
ACLS Humanities Ebook	FREE TO SEARCH
Cambridge Companions Online	FREE TO SEARCH
Oxford Scholarship Online	FREE

Exercise 3: Add a resource to your Local KnowledgeBase

Log into the Management Interface for your institution

1. Select 'Add a new resource' from the Main Menu (or use the 'Add a new IRD' button on the Resource List screen)
2. Enter as many fields as possible in IRD tabs
3. Change status of IRD to 'Testing'
4. Save the IRD record

Resource Title	Link to Native Interface
Hindawi Publishing Corporation	http://www.hindawi.com
New Scientist	http://www.newscientist.com
British History Online	http://www.british-history.ac.uk
Wikipedia es	http://es.wikipedia.org
e-Revistas	http://www.erevistas.csic.es/
Expatica.com	http://www.expatica.com/es/main.html
EL PAÍS	http://www.elpais.com/global/
Daily Telegraph	http://www.telegraph.co.uk
British Library Sounds Archive	http://sounds.bl.uk

Exercise 4: Add an External_Jump_Simple Configuration

Log into the Management Interface for your institution

In Exercise 3, you added an IRD to your Local KnowledgeBase.

Now it is time to create a configuration for some of these new IRDs.

1. Search your Local KnowledgeBase for the resource listed in the table below relating to your institution – at the moment, there is no configuration attached
2. Click on the 'A' under Config Action
3. Scroll to 'Add a new configuration'
 - a. All local configurations begin with L_ (do not delete this!)
 - b. Enter the name of your new configuration
 - c. Select EXTERNAL_JUMP_SIMPLE from the 'Access Method' drop-down list
 - d. Click on Submit
 - e. Your IRD is now linked to a CKB configuration

Resource Title	Link to Native Interface
Hindawi Publishing Corporation	http://www.hindawi.com
New Scientist	http://www.newscientist.com
British History Online	http://www.british-history.ac.uk
Wikipedia es	http://es.wikipedia.org
e-Revistas	http://www.erevistas.csic.es/
Expatica.com	http://www.expatica.com/es/main.html
EL PAÍS	http://www.elpais.com/global/
Daily Telegraph	http://www.telegraph.co.uk
British Library Sounds Archive	http://sounds.bl.uk

Exercise 5: Edit An External_Jump_Simple Configuration

Log into the Management Interface for your institution

In Exercise 4, you started creating a simple configuration for your local IRDs

Now it is time to finish the configuration.

1. Search your Local KnowledgeBase for the resource listed in the table below relating to your institution – at the moment, there is a webconfig_simple configuration attached, however it has not been configured yet.
2. Link to the native interface for the resource and determine the following:
 - a. Hostname:Port
 - b. URL Mask
 - c. Truncation Symbol (if any)
 - d. HTML Hit Pattern
 - e. Zero Hit Pattern
3. In your Local KnowledgeBase, edit the IRD to include the Hostname:Port
4. Edit the webconfig_simple configuration to include the URL Mask, Truncation Symbol and Hit Patterns.
5. Test within the configuration using the Search button.
6. Test via the User Interface.

Resource Title	Link to Native Interface
Hindawi Publishing Corporation	http://www.hindawi.com
New Scientist	http://www.newscientist.com
British History Online	http://www.british-history.ac.uk
Wikipedia es	http://es.wikipedia.org
e-Revistas	http://www.erevistas.csic.es/
Expatica.com	http://www.expatica.com/es/main.html
EL PAÍS	http://www.elpais.com/global/
Daily Telegraph	http://www.telegraph.co.uk
British Library Sounds Archive	http://sounds.bl.uk

Appendix 1:

External_jump (simple) configuration cheat sheet

BUFVC – find dvd

General	Term Transformations
Search Transformation	
Hostname:Port = http://bufvc.ac.uk/dvdfind/search.php?	
Field Name	Field Value
URL Mask	q=TERM1
Truncation Symbol	
<input type="button" value="SEARCH"/> HTML Hit Pattern	1-\d+ of (\d+) results
Zero Hit Pattern	No results found

Canadian Music

General	Term Transformations
Search Transformation	
Hostname:Port = http://www.collectionscanada.gc.ca/emp-iipmc/028001-110.01-e.php?	
Field Name	Field Value
URL Mask	q1=TERM1
Truncation Symbol	
<input type="button" value="SEARCH"/> HTML Hit Pattern	Results..1-\d+ of (\d+).
Zero Hit Pattern	No Results Found

British History online

General	Term Transformations
Search Transformation	
Hostname:Port = http://www.british-history.ac.uk/search.aspx?	
Field Name	Field Value
URL Mask	<input type="text" value="query1=TERM1"/>
Truncation Symbol	<input type="text"/>
<input type="button" value="SEARCH"/> HTML Hit Pattern	<input type="text" value="Results .strong.1..strong. to .strong.\d+..strong. of .strong.(\d+)"/>
Zero Hit Pattern	<input type="text" value="did not match any documents"/>

New Scientist

General	Term Transformations
Search Transformation	
Hostname:Port = http://www.newscientist.com/search?doSearch=true&	
Field Name	Field Value
URL Mask	<input type="text" value="query=TERM1"/>
Truncation Symbol	<input type="text"/>
<input type="button" value="SEARCH"/> HTML Hit Pattern	<input type="text" value="There are approx. (\d+) results"/>
Zero Hit Pattern	<input type="text" value="there were no results that matched your search"/>

Additional Notes

