

Resource Configurations & KB Tools MetaLib Version 4.3

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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:

IRD **Config**

IRD Action	Resource name	Resource ID	Status	Configuration code	Access Method	Config Action
<input <input="" type="button" value="S"/> <input type="button" value="P"/> <input type="button" value="T"/> <input type="button" value="D"/>	Humanities Abstracts (EBSCO) - CENTRAL	LKV00326	<input checked="" type="radio"/> A <input type="radio"/> I <input type="radio"/> T	EBSCO_QHS	Z39	<input type="button" value="Y"/> <input type="button" value="D"/>
<input <input="" type="button" value="S"/> <input type="button" value="P"/> <input type="button" value="T"/> <input type="button" value="D"/>	Humanities Abstracts (EBSCO) - UNI1	LKV01290	<input checked="" type="radio"/> A <input type="radio"/> I <input type="radio"/> T	EBSCO_QHS	Z39	<input type="button" value="Y"/> <input type="button" value="D"/>
<input <input="" type="button" value="S"/> <input type="button" value="P"/> <input type="button" value="T"/> <input type="button" value="D"/>	Humanities Abstracts (EBSCO) - UNI2	LKV01354	<input checked="" type="radio"/> A <input type="radio"/> I <input type="radio"/> T	EBSCO_QHS	Z39	<input type="button" value="Y"/> <input type="button" value="D"/>
<input <input="" type="button" value="S"/> <input type="button" value="P"/> <input type="button" value="T"/> <input type="button" value="D"/>	Humanities Abstracts (EBSCO) - UNI3	LKV01418	<input checked="" type="radio"/> A <input type="radio"/> I <input type="radio"/> T	EBSCO_QHS	Z39	<input type="button" value="Y"/> <input type="button" value="D"/>
<input <input="" type="button" value="S"/> <input type="button" value="P"/> <input type="button" value="T"/> <input type="button" value="D"/>	Humanities Abstracts (EBSCO) - UNI4	LKV01482	<input checked="" type="radio"/> A <input type="radio"/> I <input type="radio"/> T	EBSCO_QHS	Z39	<input type="button" value="Y"/> <input type="button" value="D"/>
<input <input="" type="button" value="S"/> <input type="button" value="P"/> <input type="button" value="T"/> <input type="button" value="D"/>	Humanities Abstracts (OCLC) - CENTRAL	LKV00220	<input checked="" type="radio"/> A <input type="radio"/> I <input type="radio"/> T	OCLC_W/HUM	Z39	<input type="button" value="Y"/> <input type="button" value="D"/>
<input <input="" type="button" value="S"/> <input type="button" value="P"/> <input type="button" value="T"/> <input type="button" value="D"/>	Humanities Abstracts (OCLC) - PUB1	LKV01553	<input checked="" type="radio"/> A <input type="radio"/> I <input type="radio"/> T	OCLC_W/HUM	Z39	<input type="button" value="Y"/> <input type="button" value="D"/>

The IRD

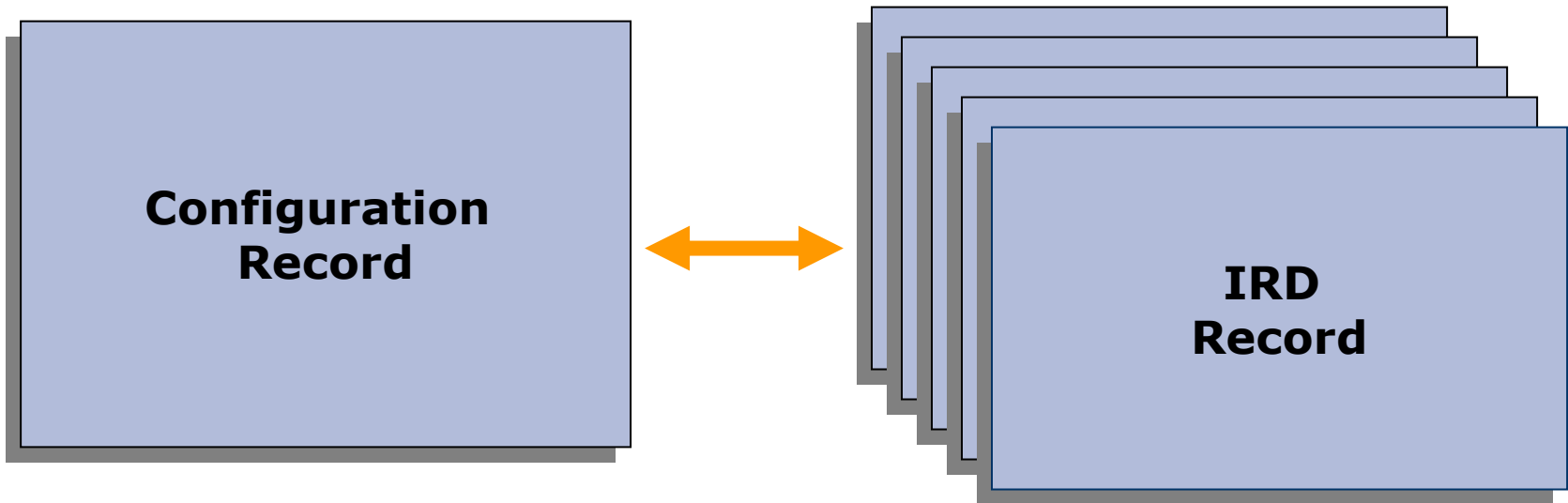
- Every resource in MetaLib needs a 'cataloguing record' in the Local KnowledgeBase
- This is the Information Resource Description (IRD) record
- The IRD consists of a number of tabs:
 - Subscription
 - Presentation: Primary
 - Presentation: Secondary
 - Presentation: Library
 - Local
 - Categories
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

The 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

MetaLib's KnowledgeBases

- Configuration records can be linked to more than one 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:

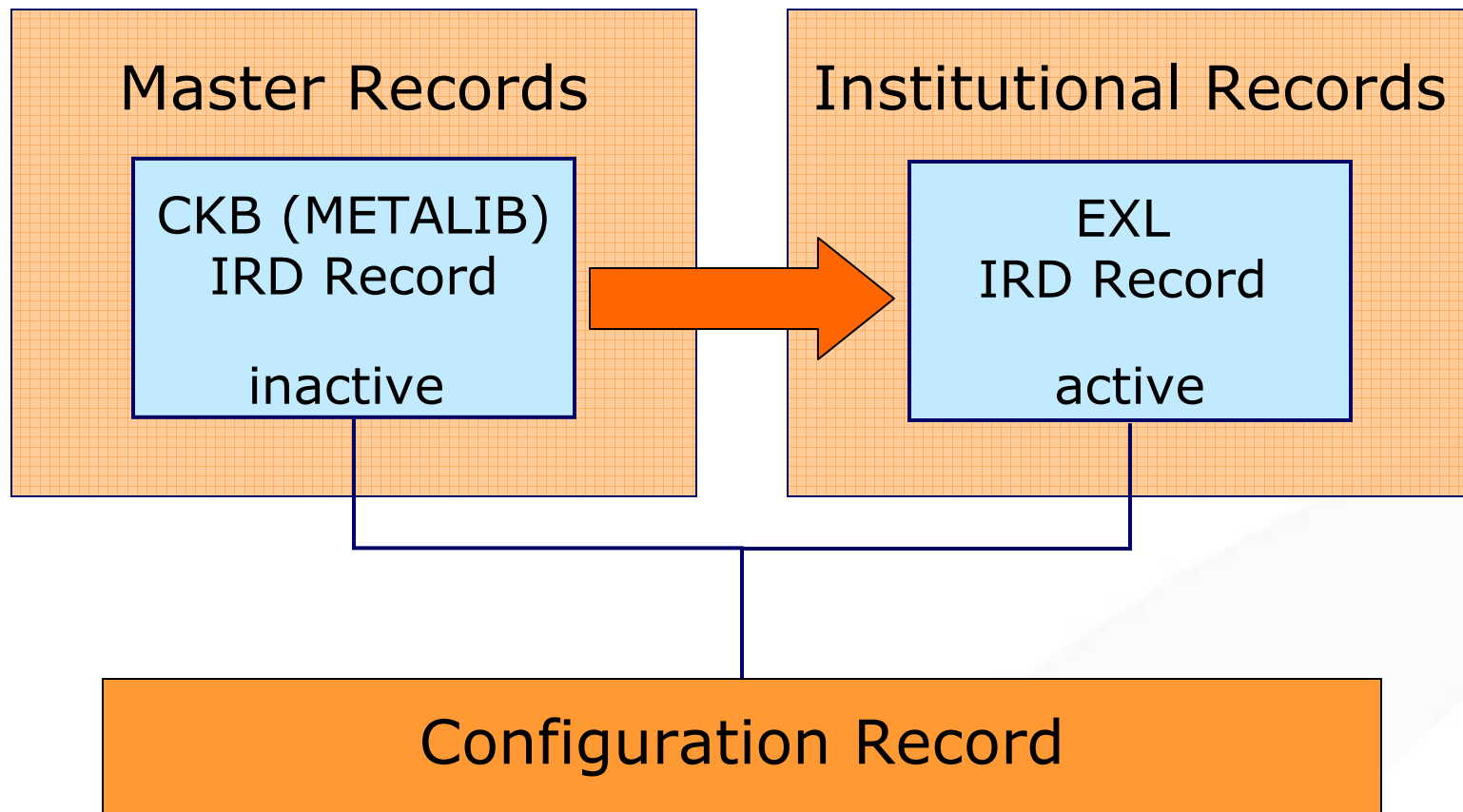
- Every MetaLib installation includes a copy of the CKB.
- The CKB is maintained by Ex Libris and cannot be edited by the library.
- All resources in the CKB are inactive.
- Ex Libris provide regular updates to the CKB.

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

Single Site



The Configuration

The screenshot displays the configuration page for a resource in the ExLibris MetaLib system. The interface includes a top navigation bar with links like 'MAIN MENU', 'SFX ADMIN', and 'END SESSION'. Below this is a 'FIND RESOURCE' button and a 'RESOURCE LIST' button. The resource name is 'AATD - Australian Accounting & Taxation Database (Informit) - EXLA'. The institution is 'METALIB'. The configuration code is 'INFORMIT_AATD'. The access method is 'Z39'. The open date is '18/09/05' and the update date is '23/01/06'. The 'General' tab is selected, showing various configuration options like 'Outgoing character conversion', 'Format conversion', and 'Incoming character conversion'. The 'Direct link type' is set to 'TAG-F' and the 'Direct Link Field Tag' is '001'. The 'Z39 Record Type' is 'USMARC'. The status bar at the bottom shows 'Done' and a timer '1.390s'.

From IRD

Configuration code

Institution

Access Method

Config tabs

The Configuration - Access Methods in CKB

Resource Name: ABI/INFORM Global Full Text (SP) - METALIB
Institution: METALIB
Restart Z39 **Access Method: Z39**
Open Date: 21/12/01
Configuration Code: SILVER_UMAF
Configuration Type: Full Record
Update Date: 27/02/04

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

Field Name
tcp
http

General

Format conversion
Incoming character c
Jump to
Direct Link
Z39 Re
Elem

Access Methods:

- Z39
- Z39/SUTRS
- EXTERNAL
- EXTERNAL_JUMP
- ALEPH_X
- ALEPH_X_VH
- WEBCONFIG_SIMPLE
- WEBCONFIG_COMPLETE
- WEBCONFIG_XML

The Configuration - Supported Access Methods

- Z39 & Z39/SUTRS
 - Uses the Z39.50 protocol to search the resource and retrieve records
- EXTERNAL & EXTERNAL_JUMP
 - Special programs written to search a resource and process the results –uses HTTP protocol
- ALEPH_X & ALEPH_X_VH
 - For ALEPH only - uses the ALEPH X-Server to search; also for use with ALEPH's Virtual Host – uses HTTP/XML

The Configuration - Supported Access Methods

- **WEBCONFIG_SIMPLE**
 - Uses the HTTP protocol ('screen-scraping') to create Search & Link resources – limited functionality
- **WEBCONFIG_COMPLETE**
 - Uses HTTP protocol
- **WEBCONFIG_XML**
 - Uses HTTP for searching; retrieves and parses XML
- All new configurations called External_Jump not Webconfig

The Configuration - Supported Access Methods

- Choose the appropriate access method for the “technology” the resource provides
- Configuration records for each Access Method contain different information
 - Z39 Access Method contains Z39.50 search attributes
 - Access Methods for “Search & Link” configurations do not contain Conversion and OpenURL tabs

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 3 - Create, link or copy Configuration record

The screenshot displays the MetaLib web interface. At the top, there is a browser menu bar with 'File', 'Edit', 'View', 'History', 'Bookmarks', 'Tools', and 'Help'. Below this is the MetaLib logo and a 'POWERED BY MetaLib' badge. A navigation bar contains links: 'MAIN MENU', 'SFX ADMIN', 'USER INFO', 'STATISTICS', 'METAINDEX', 'CATEGORIES ADMIN', 'PORTAL ADMIN', and 'END SESSION'. Below the navigation bar, there are two buttons: 'FIND RESOURCE' and 'RESOURCE LIST'. A yellow banner below these buttons displays 'science (SCIENCE)'. The main content area is divided into two columns. The left column is titled 'MetaLib KnowledgeBase' and contains a list of items: 'Resource Cataloging and Configuration' (highlighted with an orange box), 'Find a Resource', 'Browse List of Resources', 'Add a New Resource', 'View Resources Added in CKB Update', 'View Resources Changed in CKB Update', 'Export-Import Procedures', and 'Restart Z39 Gate'. The right column is titled 'MetaLib Administration' and contains a list of items: 'Set-Up' (with sub-items 'Institutional Settings', 'Portal Administration', and 'Categories Admin'), 'User Administration' (with sub-items 'Register Users' and 'List of Users'), 'Reports & Statistics', and 'MetalIndex Management'.

File Edit View History Bookmarks Tools Help

MetaLib

POWERED BY MetaLib

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

FIND RESOURCE RESOURCE LIST

science (SCIENCE)

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
- ♦ Export-Import Procedures
- ♦ Restart Z39 Gate

MetaLib Administration

- ♦ Set-Up
 - ◊ Institutional Settings
 - ◊ Portal Administration
 - ◊ Categories Admin
- ♦ User Administration
 - ◊ Register Users
 - ◊ List of Users
- ♦ Reports & Statistics
- ♦ MetalIndex Management

Step 3 - Create, link or copy Configuration record

Linking to a CKB config

Resources included in the CKB, which have been automatically copied across to your LKB, will already be linked to the appropriate CKB configuration.

The screenshot displays the MetaLib interface. On the left, the 'RESOURCE LIST' tab is active, showing a table of resources. An orange box highlights the table, and a red box highlights the 'CKB02717' link in the 'Resource ID' column. A red arrow points from this link to the 'Source ID' field in the configuration form on the right. The configuration form is titled 'Resource Name: AAP NewsCentre - EXLA' and contains various fields for configuration details.

IRD Action	Resource name	Resource ID	Status	Configuration	Access	Config
<input checked="" type="checkbox"/>	AAP NewsCentre - METALIB	CKB02717	A	AAP	EXTERNAL	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	AAP NewsCentre - EXLA	XLA01872	A	AAP	EXTERNAL	<input checked="" type="checkbox"/>

Global updates: ☐ CKB notes ☐ Subscription ☐ Presentation ☐ Copy ☐ Delete ☐ Add ☐ Edit ☐ View
* Inactive Link between IRD and Config

Configuration form fields:

- Full Name: AAP NewsCentre
- Display Name: AAP NewsCentre
- Institution: Ex Libris Australia
- Secondary Affiliation: List of user groups
- IP Filter: List of IP filters
- Configuration Code: AAP
- Free/By Subscription: Subscription
- Link to Native Interface URL: http://newscentre.aap.com.au/SRW/SRW.aspx
- Proxy Server Flag: No need for proxy server / Use proxy server
- Hostname:Port: http://newscentre.aap.com.au/SRW/SRW.aspx
- Database Code: vicpar2/metalib/newscentre3
- Authentication: vicpar2/metalib/newscentre3
- Link to Records in Native Interface: vicpar2/metalib/newscentre3
- Number of Sessions: 1
- Cataloger's Note:
- Verde Indicator: ☐
- Verde Access Type:
- Version: 0313
- Region:
- Entry Date (YYYYMMDD):
- Update (YYYYMMDD):
- Alternative Link to Native Interface URL:
- Alternative Link to Records in Native Interface:
- Source ID: CKB02717
- Original ID: XLA01872
- Sysno: 000003584

Step 3 - Create, link or copy Configuration record

Linking to a CKB config

- The KnowledgeBase includes templates which can be used when creating IRDs for particular providers/library systems.
- After copying the Template IRD in your Local KnowledgeBase, link the IRD to the matching CKB configuration

Step 3 - Create, link or copy Configuration record

Linking to a CKB config

The first screenshot shows the 'Find Query' page with 'Institution=EXLA' and 'Number of resources found: 1'. The 'Global updates' section has a dropdown menu open, and the 'IRD Action' column in the table below has a red box around the 'Link' icon.

The second screenshot shows the 'Resource Name: UWA Innopac Catalogue - EXLA' page. The 'Mandatory fields' section includes 'Full Name', 'Display Name', 'Institution', 'Secondary Affiliation', 'IP Filter', 'Configuration Code', 'Free/By Subscription', 'Link to Native Interface URL', 'Proxy Server Flag', 'Hostname:Port', 'Database Code', 'Authentication', 'Link to Records in Native Interface', and 'Number of Sessions'. The 'Configuration Code' field is highlighted with a red box.

The third screenshot shows the 'Find Query' page with 'Institution=EXLA AND Name=innopac' and 'Number of resources found: 1'. The 'Global updates' section has a dropdown menu open, and the 'IRD Action' column in the table below has a red box around the 'Link' icon.

IRD Action	Resource name	Resource ID	Status	Configuration	Access	Config
<input type="checkbox"/> ? ? ? ? ?	UWA Innopac Catalogue - EXLA	XL001952	○ A ○ I ○			
<input checked="" type="checkbox"/> ? ? ? ? ?	TEMPLATE Innopac (Innovative) - EXLA	XL000612	○ A ○ I ○	OPAC_INNO_TEMP	Z39	?

Step 3 - Create, link or copy Configuration record

Linking to a CKB config

MetaLib POWERED BY MetaLib

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

FIND RESOURCE **RESOURCE LIST**

exlj (EXLGROUP)

Add A Configuration to UWA Innopac Catalogue - EXLA

Choose one of the following 3 options:

Copy from an existing

Enter Configuration Code to copy :

Enter new Configuration Code :

Add a new code

Enter new configuration code :

Enter Access Method :

Link to an existing

Note: If UWA Innopac Catalogue - EXLA is a copy of a CKB IRD, you must first delete the IRD in order to link it to the CKB IRD.

Enter Configuration Code :

Done

MetaLib POWERED BY MetaLib

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

FIND RESOURCE **RESOURCE LIST**

exlj (EXLGROUP) Configuration record was linked successfully.

ADD A NEW IRD

Find Query: Institution=EXLA AND Name=innopac

Number of resources found: 1

☒ CKB notes ☒ Subscription ☒ Presentation ☒ Copy ☒ Delete ☒ Add ☒ Edit
* Inactive Link between IRD and Config

Global updates: - Select type of update -

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

IRD Action	Resource name	Resource ID	Status
<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	UWA Innopac Catalogue - EXLA	XLA01952	<input type="radio"/> A <input checked="" type="radio"/>
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	TEMPLATE Innopac (Innovative) - EXLA	XLA00612	<input type="radio"/> A <input checked="" type="radio"/>

☒ CKB notes ☒ Subscription ☒ Presentation ☒ Copy ☒ Delete ☒ Add ☒ Edit
* Inactive Link between IRD and Config

MetaLib POWERED BY MetaLib

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

FIND RESOURCE **RESOURCE LIST**

exlj (EXLGROUP)

Resource Name: UWA Innopac Catalogue - EXLA

Institution: METALIB **Configuration Code:** OPAC_INNO_TEMP

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

Open Date: 09/06/04 **Update Date:** 21/03/06

General **Term Transformations** **Conversion** **OpenURL** **Sort**

General Information

Field Name	Value
Version	
Outgoing character conversion	UTF_TO_MARC8
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	OPAC
Direct link type	

Done

Step 3 - Create, link or copy Configuration record

Linking to a CKB config

- Used for
 - Library catalogues
 - Vendors templates e.g Chadwyck Healey databases can use Proquest Z39 template

Step 3 - Create, link or copy Configuration record

Copying a CKB config

- CKB configurations, in the METALIB institution, cannot be edited
- Libraries wishing to edit a CKB configuration must create a local copy in their LKB first
 - Note: this is not recommended as the configuration will no longer be linked to the MetaLib institution and will not be automatically updated during CKB updates.

Copying a CKB config

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Step 3 - Create, link or copy Configuration record

Copying a CKB config

The screenshot displays the MetaLib web interface with three overlapping windows. The background window shows the 'Resource List' for 'exlib (EXLGROUP)'. The middle window shows the details for a resource named 'AEIPT - A+ Education: Australian Education Index', including fields for Institution (EXLA), Configuration Code (Restart Z39), Access Method (Z39), Open Date (29/09/06), and Update Date (29/09/06). The foreground window shows the 'Update SFX Parameters' table, which is used to define the OpenURL parameters for the resource.

	If Field	If Field Contains	OpenURL Element	Tag	Program	Parameters
30			YEAR	YR		a
30			AUTHOR-FIRST	100##	Author LastFirst	Pa
30			AUTHOR-LAST	100##	Author LastFirst	Pa
30			ISSN	022##	Reg Exp	Pa/(\d{4}-?\d{3}[\d\X])
30			ISBN	020##	Reg Exp	Pa/(\d+X?x?)
30			VOLUME	VOL		a
30			ISSUE	773##	Reg Exp	Pa/(\d+)(\d+)
30			START-PAGE	PG	Reg Exp	Pa/(\d+)-?

Step 3 - Create, link or copy Configuration record

Creating a CKB config

- Libraries can create their own configurations, using the z39.50 access method

MetaLib

POWERED BY MetaLib

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

FIND RESOURCE | RESOURCE LIST

exlj (EXLGROUP)

Add A Configuration to AEIPT - A+ Education: Australian Education Index Plus Text (Informit) - EXLA

Choose one of the following 3 options:

Copy from an existing configuration

Enter Configuration Code to copy : BROWSE

Enter new Configuration Code : SUBMIT CANCEL

Add a new configuration

Enter new configuration code :

Enter Access Method : Z39 Z39/SUTRS EXTERNAL EXTERNAL_JUMP ALEPH_X ALEPH_X_VH WEBCONFIG SIMPLE

SUBMIT CANCEL

Link to

Enter Configuration Code : BROWSE

Note: If AEIPT - A+ Education: Australian Education Index Plus Text (Informit) - EXLA is a copy of a CKB IRD, use Global Updates to 'Switch to CKB Configuration' in order to link it to the CKB IRD.

Done 0.531s

ExLibris MetaLib

Step 3 - Create, link or copy Configuration record

Creating a CKB config

- Libraries can also use the EXTERNAL_JUMP_SIMPLE tool to create local http configurations for 'Search and Link' resources

The screenshot shows the ExLibris MetaLib administration interface. At the top, there's a navigation bar with links like MAIN MENU, SFX ADMIN, USER INFO, STATISTICS, METAINDEX, CATEGORIES ADMIN, PORTAL ADMIN, MANAGE QUICKSETS, and END SESSION. Below this is a blue header with buttons for FIND RESOURCE and RESOURCE LIST. The main content area shows the configuration for a resource named 'New Scientist - HOPE'. It includes fields for Institution (HOPE), Access Method (EXTERNAL_JUMP), Open Date (03/06/09), Configuration Code (L_NEW_SCIENTIST), and Configuration Type (Search & Link). There are tabs for General and Term Transformations. The General tab is active, showing a table for General Information with columns Field Name and Value. The table has two rows: Find Module (web_config_complete_find) and Outgoing character conversion (empty). At the bottom, there are buttons for SAVE, SAVE & EXIT, and CANCEL.

ExLibris MetaLib

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

FIND RESOURCE | RESOURCE LIST

mladmin (ALL)

? Resource Name: New Scientist - HOPE

Institution: HOPE Configuration Code: L_NEW_SCIENTIST

Access Method: EXTERNAL_JUMP Configuration Type: Search & Link

Open Date: 03/06/09 Update Date: 03/06/09

SAVE SAVE & EXIT CANCEL

General Term Transformations

General Information	
Field Name	Value
Find Module	web_config_complete_find
Outgoing character conversion	

SAVE SAVE & EXIT CANCEL

ExLibris MetaLib

Hands On



Exercise 4 – Add a configuration

Create a **EXTERNAL_JUMP_SIMPLE** configuration

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 4 – Activate, test & make corrections

Activate

- Set status of resource to Active or Testing

The screenshot shows the MetaLib 'RESOURCE LIST' interface. At the top, there's a navigation bar with links like MAIN MENU, SFX ADMIN, USER INFO, STATISTICS, METAINDEX, CATEGORIES ADMIN, PORTAL ADMIN, and END SESSION. Below this is a search bar with 'Find Query: Institution=EXLA AND Status=ACTIVE AND Name=AEIPT' and 'Number of resources found: 1'. A table of resources is displayed with columns: IRD Action, Resource name, Resource ID, Status, Configuration code, Access Method, and Config Action. The first resource is 'AEIPT - A+ Education: Australian Education Index Plus Text (Informit) - EXLA' with Resource ID 'XLA00794'. The 'Status' column for this resource shows three radio buttons: 'A' (Active), 'I' (Inactive), and 'T' (Testing). The 'A' button is selected and highlighted with a black box. Below the table, there are links for 'Replicate', 'Deselect all', and a 'Global updates' section with a dropdown menu and 'collapse'/'expand' buttons. The footer shows 'Done' and a timer '0.500s'.

IRD Action	Resource name	Resource ID	Status	Configuration code	Access Method	Config Action
<input checked="" type="checkbox"/> ? ? ? ? ?	AEIPT - A+ Education: Australian Education Index Plus Text (Informit) - EXLA	XLA00794	<input checked="" type="radio"/> A <input type="radio"/> I <input type="radio"/> T	INFORMIT_AEI	Z39	<input checked="" type="checkbox"/> ?

Step 4 – Activate, test & make corrections

Activate

- If the resource uses z39 protocol, restart the z39_gate to “kick in” the new config

The screenshot shows the MetaLib administration interface. At the top, there's a navigation bar with links: MAIN MENU, SFX ADMIN, USER INFO, STATISTICS, METAINDEX, CATEGORIES ADMIN, PORTAL ADMIN, and END SESSION. Below this is a blue bar with 'FIND RESOURCE' and 'RESOURCE LIST' buttons. A yellow banner below that says 'exlj (EXLGROUP)'. The main content area shows the configuration for a resource named 'AEIPT - A+ Education: Australian Education Index Plus Text (Informit) - EXLA'. The 'Institution' is 'METALIB'. The 'Access Method' is 'Z39', and the 'Restart Z39' button is highlighted. Other fields include 'Open Date: 26/09/05', 'Configuration Code: INFORMIT_AEI', 'Configuration Type: Full Record', and 'Update Date: 09/05/06'. Below this are tabs for 'General', 'Term Transformations', 'Conversion', 'OpenURL', and 'Sort'. The 'General' tab is selected, showing a table of 'General Information' with fields like 'Version', 'Outgoing character conversion', 'Record Type', 'Format conversion program', 'Incoming character conversion', 'Jump to native interface (from results list)', 'Holding method', and 'Direct link type'.

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	TAG-F

Step 4 – Activate, test & make corrections

Test

- Test resource in the MetaLib User Interface

The screenshot displays the MetaLib user interface. On the left, the 'Search in Database' section shows a search for 'water' in the 'A+ Education Plus Text (Informit)' database. The search results on the right show a list of 10 records, including titles like 'Between a rock and a hard place: it pays to be fluid' and 'The foundations of early childhood education: historically situated practice'.

Search in Database

Simple **Advanced**

Search in fields: All Fields water And All Fields water GO

A+ Education Plus Text (Informit)

Title: AEIPT - A+ Education: Australian Education Index Plus Text (Informit)

Type: Index

Description: Comprehensively indexes and abstracts articles from over 100 Australian, New Zealand and Pacific law journals. Selectively indexes and abstracts articles from major law journals from United States, Canada and the United Kingdom.

Publisher: RMIT Publishing

Search Results

Search for "water" in A+ Education Plus Text (Informit)

Table View Brief View Full View Jump to #: 1

1- 10 of 260 records Go to MetaSearch <Previous Next>

No.	Author	Title	Year	Database	Action
1	Edwards P	Between a rock and a hard place: it pays to be fluid.	2006	A+ Education Plus Text (Informit)	
2	Edwards S	The foundations of early childhood education: historically situated practice.	2006	A+ Education Plus Text (Informit)	
3	Patterson J	How to strengthen your resilience in tough times.	2006	A+ Education Plus Text (Informit)	
4	Hudson P	Exploring a four-step science teaching and learning sequence for sustainable living.	2006	A+ Education Plus Text (Informit)	
5	Tytler R	Picturing evaporation: learning science literacy through a particle representation.	2006	A+ Education Plus Text (Informit)	
6	De Berg K	What happens when salt dissolves in water? An introduction to scientific argument and counter-argument drawn from the history of	2006	A+ Education Plus Text (Informit)	
7	Illingworth J	Diarrugan's College puts paid to bullying.	2005	A+ Education Plus Text (Informit)	
8	Davis P	Environmental communication.	2005	A+ Education Plus Text (Informit)	
9		Sealing in the quality.	2005	A+ Education Plus Text (Informit)	
10	Ward M	The Victorian Essential Learning Standards: incorporating a thematic approach to development of curriculum in geography.	2005	A+ Education Plus Text (Informit)	

- Field searches
- Phrase searching
- Truncation
- Display of records
- OpenURL elements

Step 4 – Activate, test & make corrections

Use the yaz_client for z39.50 resources

Test

```
auth userid/password
```

```
open tcp:192.115.76.100:210
```

```
base abc
```

```
find @attr 1=4 France (title)
```

```
show 1
```

```
find @attr 1=1003 jones (author)
```

```
find @attr 1=21 poets (subject)
```

```
find @attr 1=1016 winter (all fields)
```

Troubleshooting Non-Working Resources

Case One: It Never Worked.

- Do other things from this vendor work?
- Is your password correct?
- Did you register your IP for federated search access?
- Did you double-check the IRD?
- Have you read the Configuration Notes?

Try our server-side testing tools (YAZ, MLWP)
Contact the vendor, Ex Libris Support

Troubleshooting Non-Working Resources

Case Two: It Used to Work. It Stopped.

- Has anything else stopped working?
- Have you run a CKB Update?
- Have you made the “Manual changes needed”?
- Has your subscription lapsed?
- Did you change your firewall?

Contact the customer listserv, the vendor, Ex Libris Support

Other KB Tools

- CKB Update
- Import / Export

Running the CKB Update

- Can be run manually or as a cron job
- Added and updated resource list available via links in Management Interface Main Menu
- CKB Update Release Notes (Excel file) included with CKB Update process
 - Important to check whether manual changes required for specific IRDs

Running the CKB Update

- Version dependent – will not download advanced records for earlier versions of software
 - If a software update is required, new configurations will be downloaded when upgrade to correct revision is complete
- E-mail notification sent after CKB Update process complete
 - E-mail service must be configured on MetaLib server

CKB Update



Powered by 

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

FIND RESOURCE | RESOURCE LIST

exlv (EXLV)

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
- Generate Deep Link
- Reports & Statistics
- MetaIndex Management

Export and Import Procedures

Export and Import Procedures

- CKB Update
- CKB Update Cron Job Interface
- Export Resources
- Import Resources
- Export KnowledgeBase Resources to Primo

CKB Update: Initial Form

Process initiated from CKB Update form in /M

CKB Update

The CKB Update procedure retrieves new and updated resources from the CKB and adds new IRDs to local institutions if they are configured to get new IRDs. Please see the documentation for information about setting up your server to retrieve CKB Updates.

Please ensure that a backup of your KnowledgeBase has been done recently before running the CKB Update.

Email address to which report should be sent

CKB Update: Cron Job Interface

CKB Update - Cron Job Interface

Minutes - the minute you want the procedure to start. Possible values: 0-59

Hour - the hour you want the procedure to start. Possible values: 0-23

Day of Month - day of the month that you want the procedure to start. Possible values: 1-31

Month - the month you want the procedure to run in. Possible values 1-12

Each of the fields may contain a single value or an asterisk which indicates all possible values.

For example: A * in the month field indicates every month.

For more details refer to online Help on the User's Guide.

Minutes	Hour	Day of month	Month	Email address
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Requirements for CKB Update

- Communication with our CKB Update server enabled on MetaLib server
 - Outgoing HTTP for request initiation
 - Outgoing SFTP for file transfer
- Set up of MetaLib server tables (in **./dat01/tab**)
 - **tab_ckb_pull**: configures details for access to our CKB Update server
 - **ckb_update_date**: configures last updated date and version
- Authorization from Ex Libris to access our server

Setting Up **tab_ckb_pull**


- Information required filled in by Project Manager during system set up
- File located in **./dat01/tab** directory
 - IP address of CKB server
 - Port of CKB server
 - Username for sftp-ing
 - Password for sftp-ing

Configuring Institutional Settings

- CKB Update is automatically loaded to the METALIB institution (CKB)
- Institutional Settings module defines whether to also update the local Knowledgebase
 - New IRDs added
 - Local IRDs are not overwritten

Institutional Settings

Institution Code: Institution Name:

 ☒ Copy new IRDs to this institution during the CKB Update

[Go to Portal Administration](#)

Thank You!

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