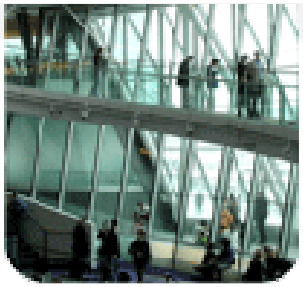

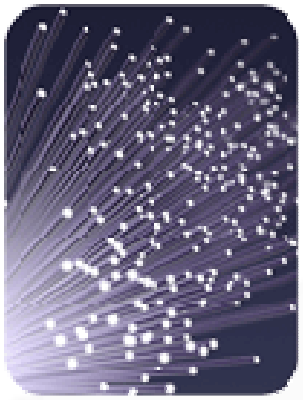

Resource Configurations & KB Tools
MetaLib Version 4.3

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ExLibris MetaLib

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

ExLibris MetaLib

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

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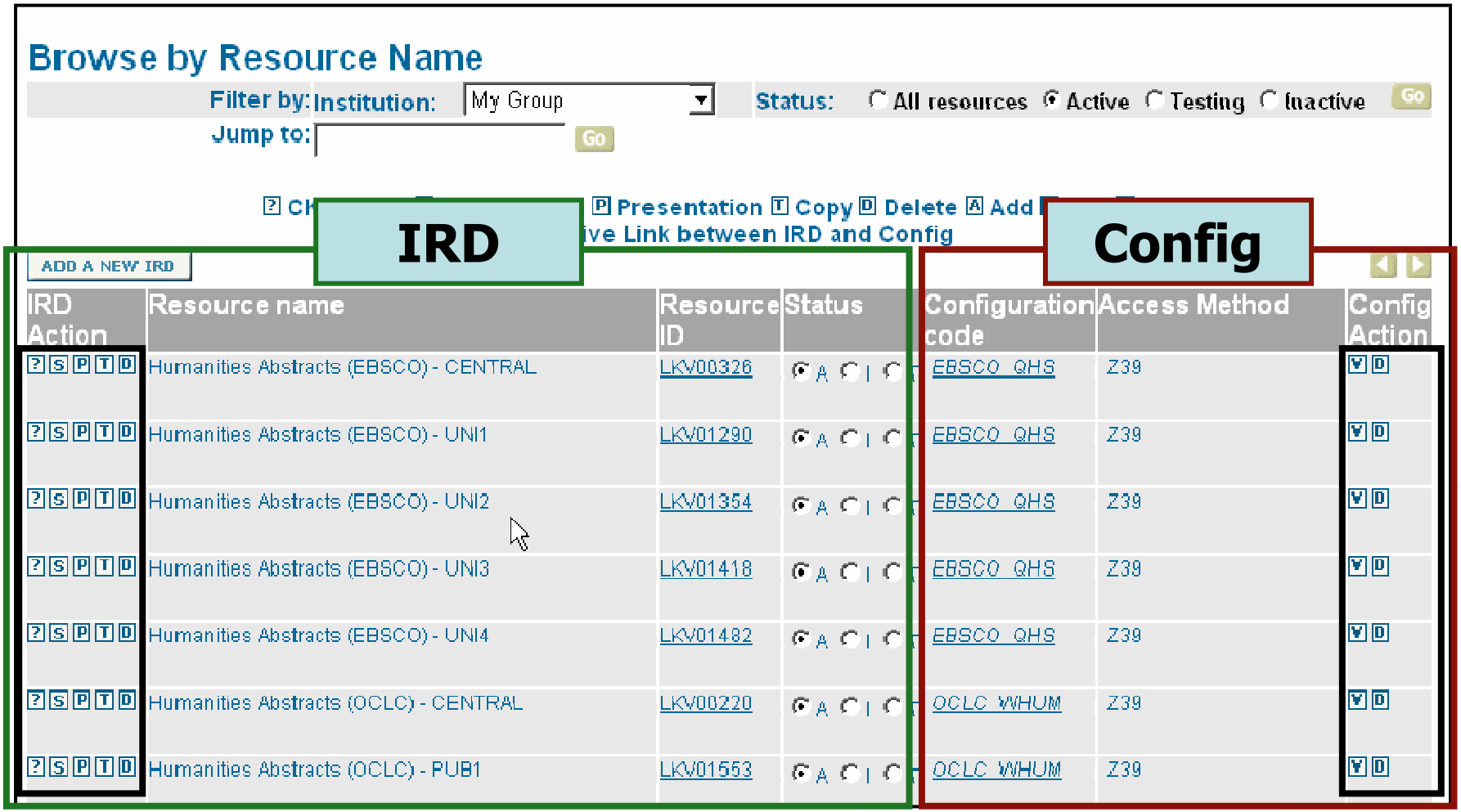
Resources in the KnowledgeBase



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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

ExLibris MetaLib

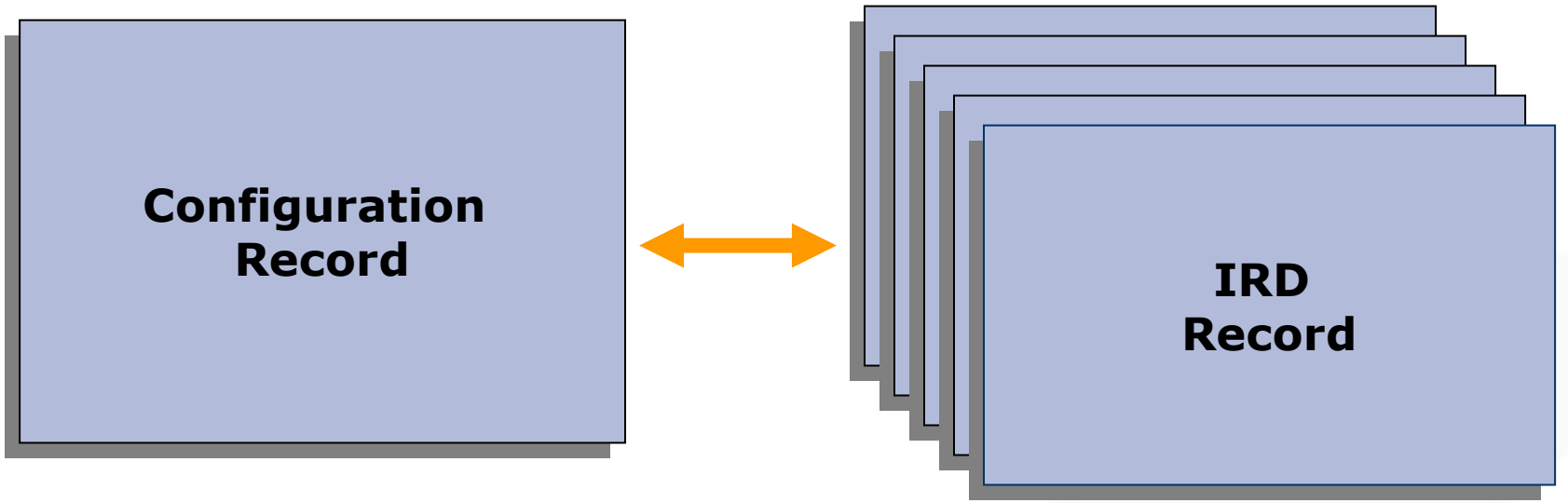
The Configuration

- 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

ExLibris MetaLib

MetaLib's KnowledgeBases

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



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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:

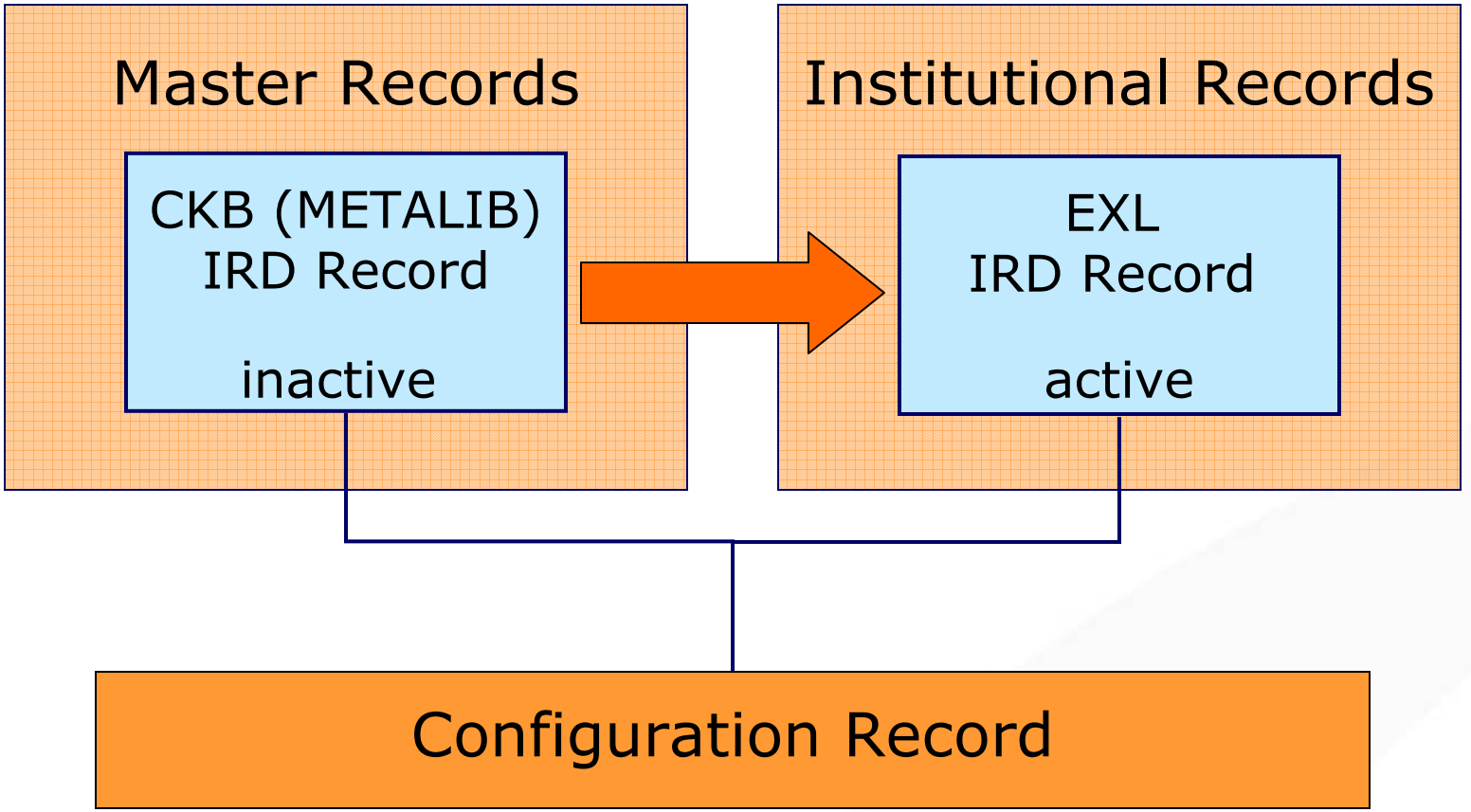
- Every MetaLib installation includes a copy of the CKB.
- The CKB is maintained by Ex Libris and cannot be edited by the library.
- All resources in the CKB are inactive.
- Ex Libris provide regular updates to the CKB.

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



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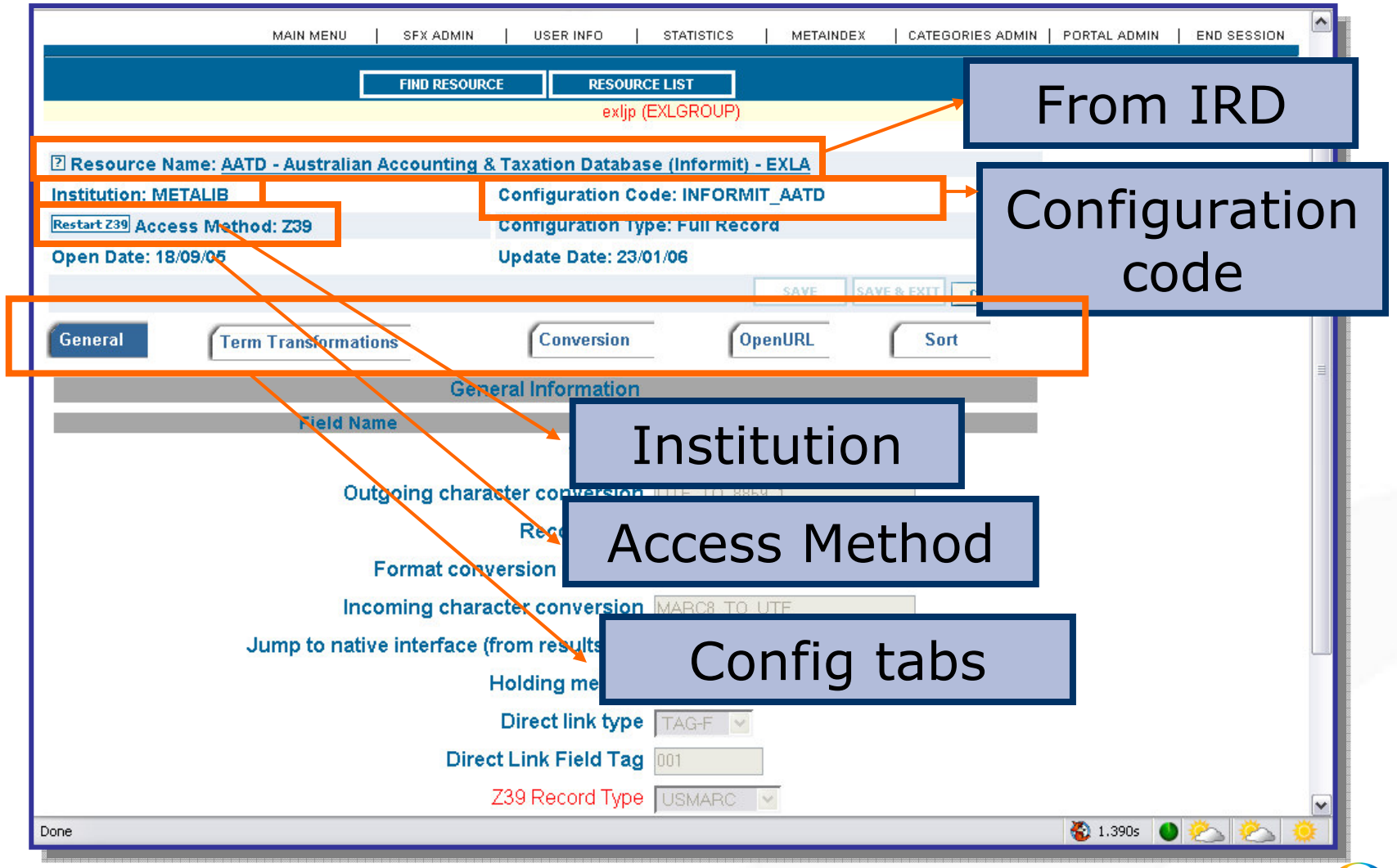
The Configuration



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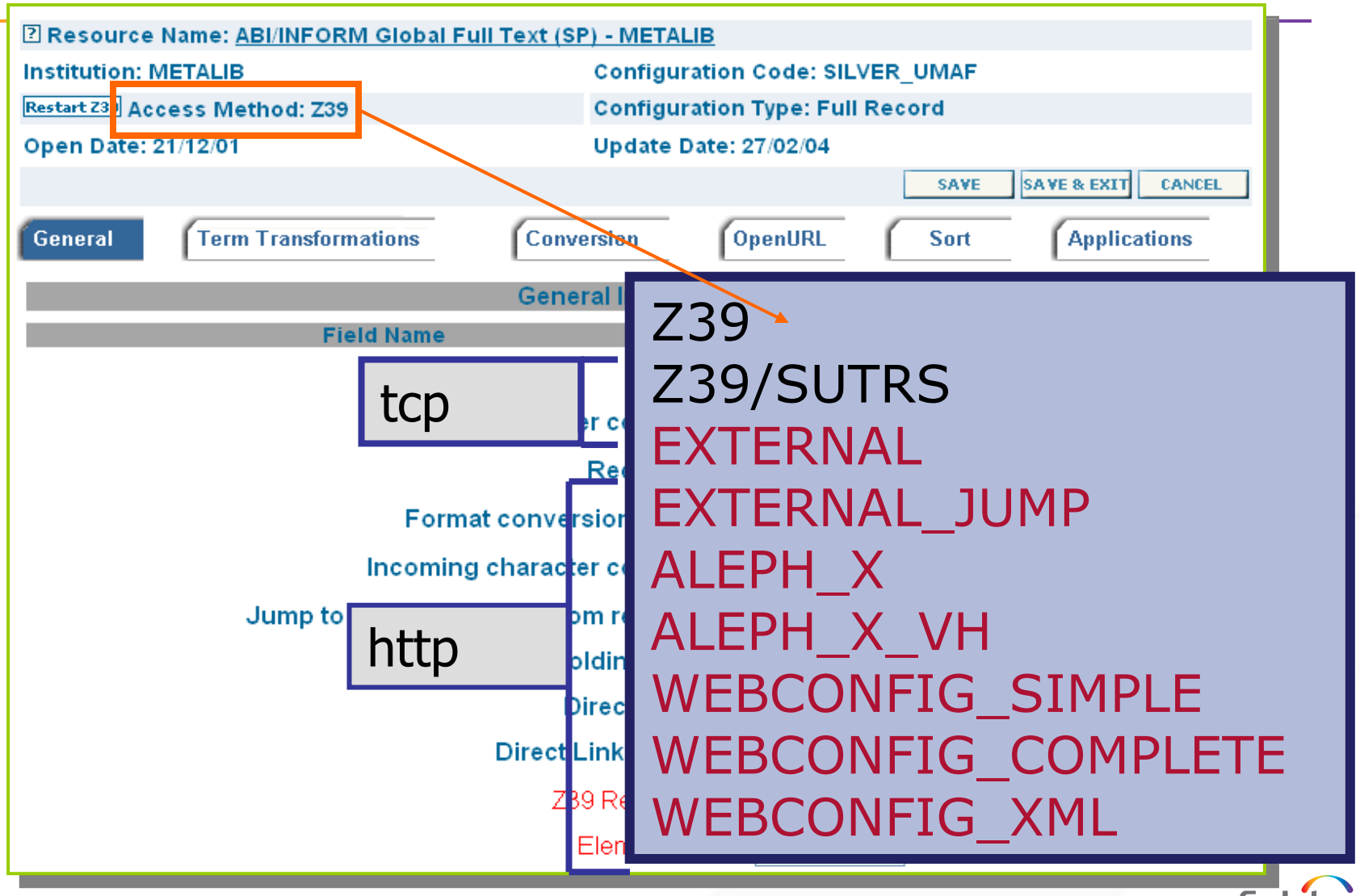
The Configuration - Access Methods in CKB



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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

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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

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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

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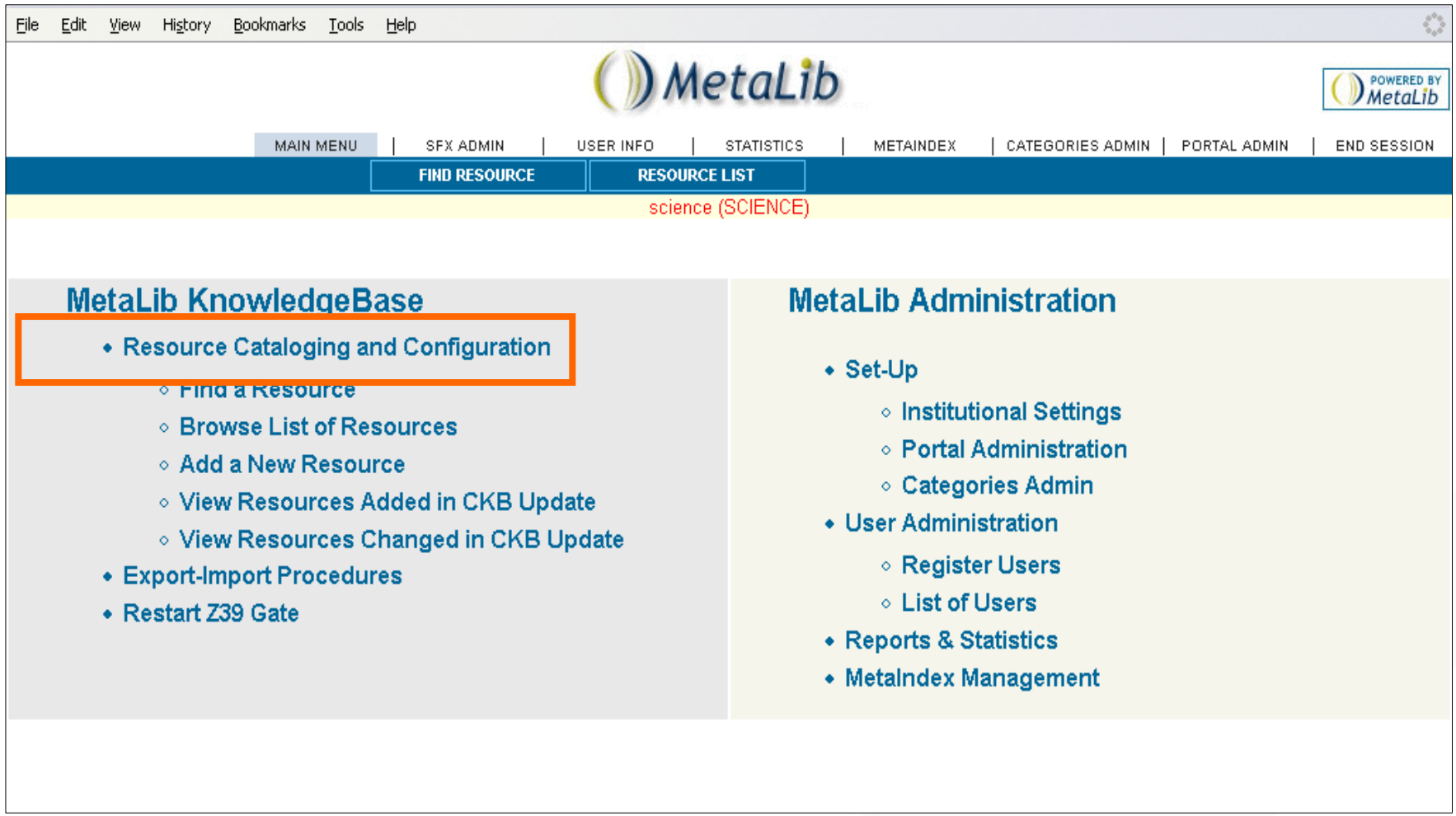
Step 3 - Create, link or copy Configuration record



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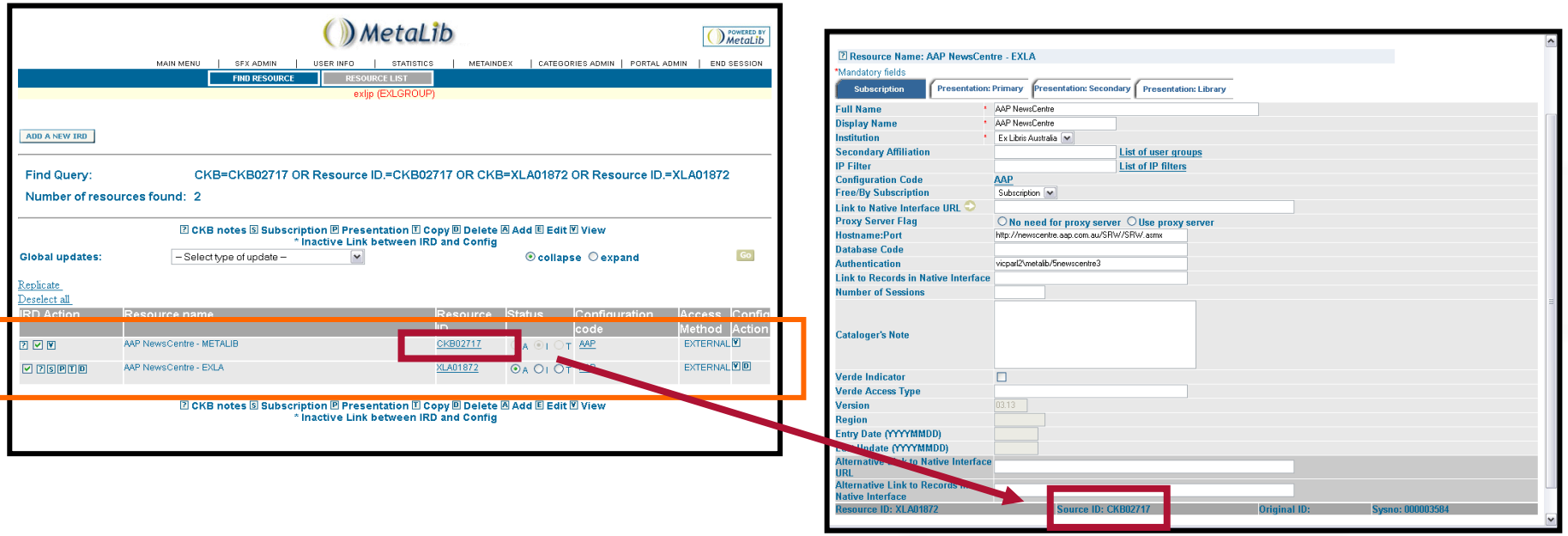
Step 3 - Create, link or copy Configuration record

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.



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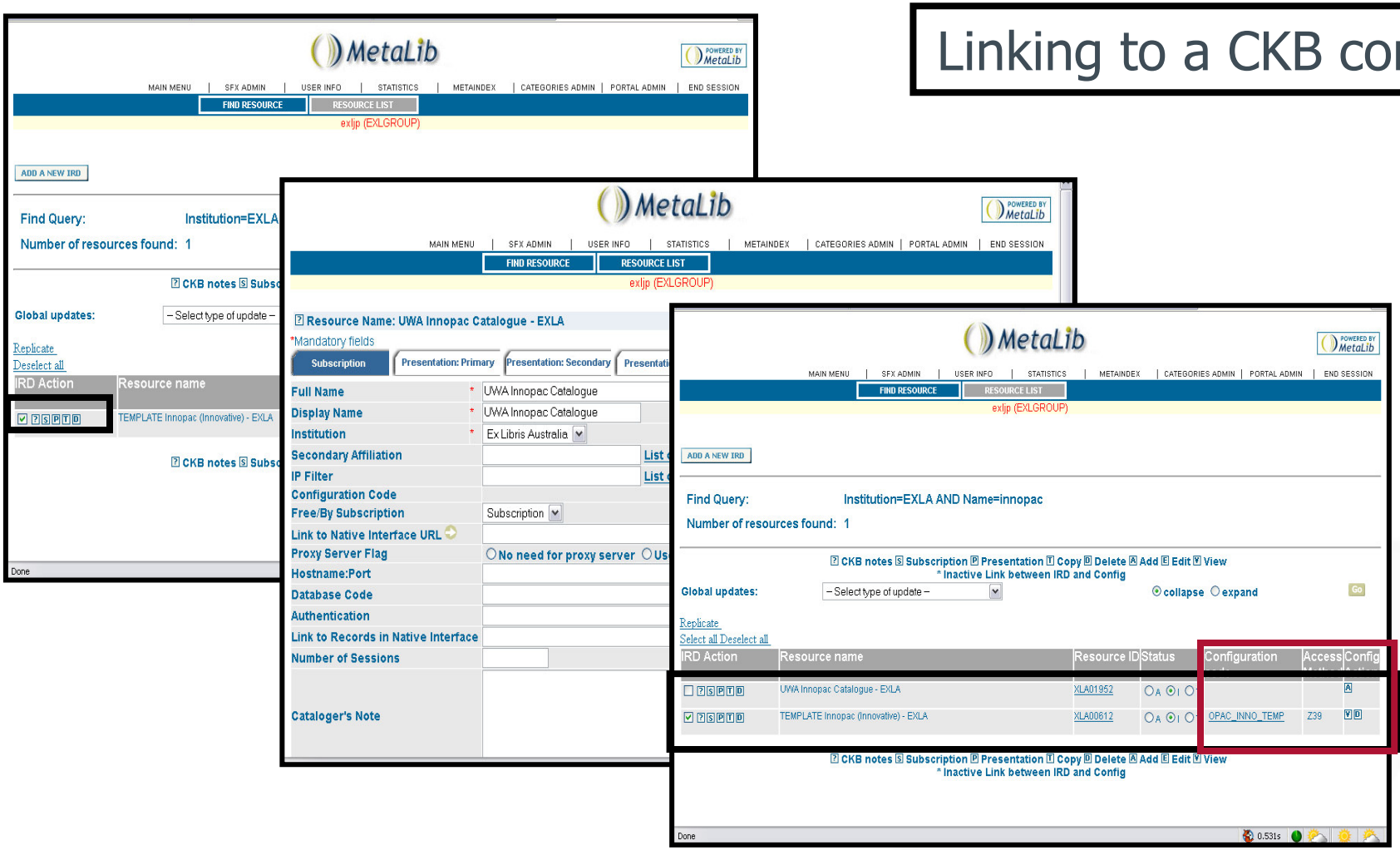
Step 3 - Create, link or copy Configuration record

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



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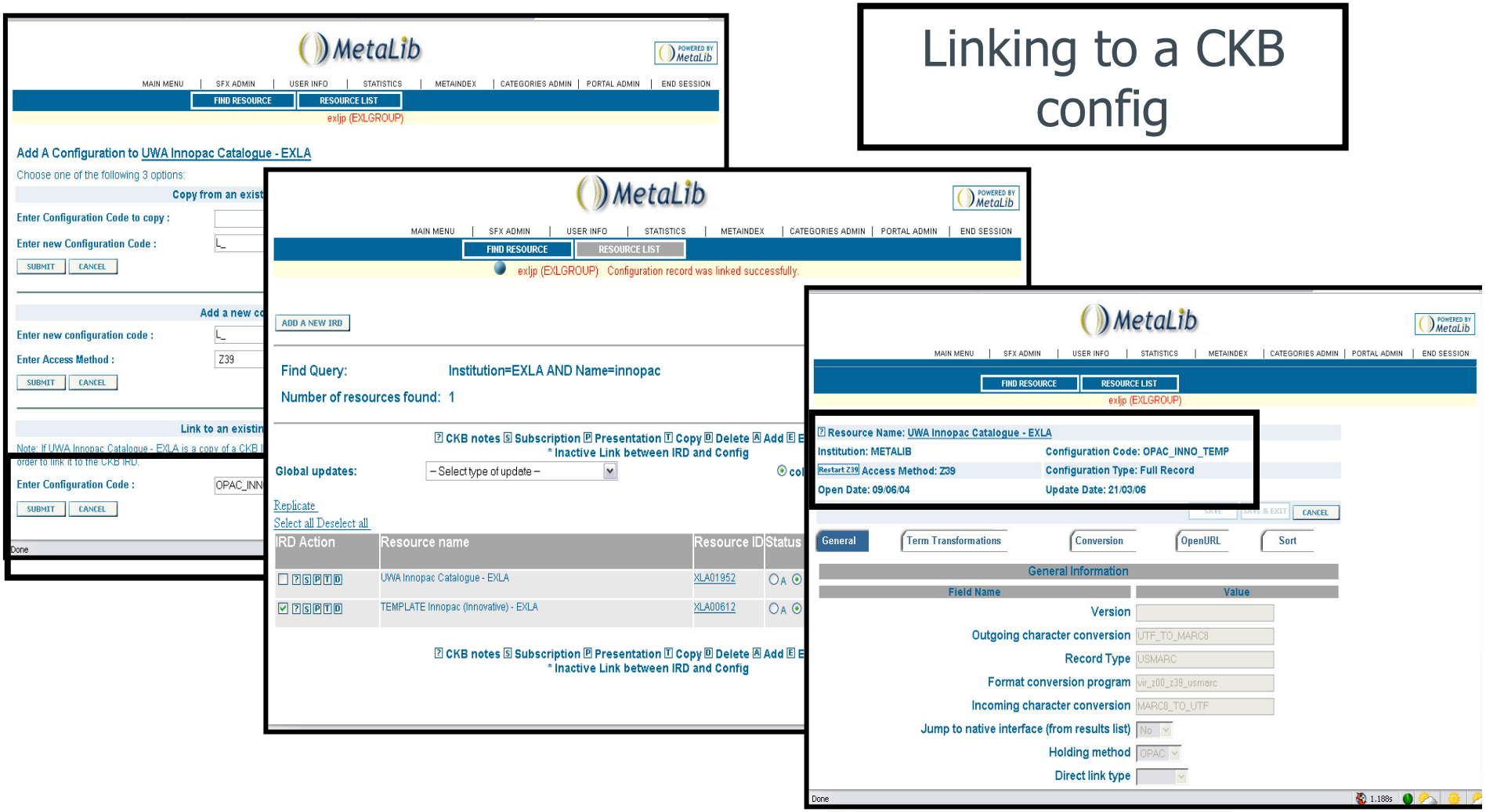
Step 3 - Create, link or copy Configuration record



Linking to a CKB config

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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

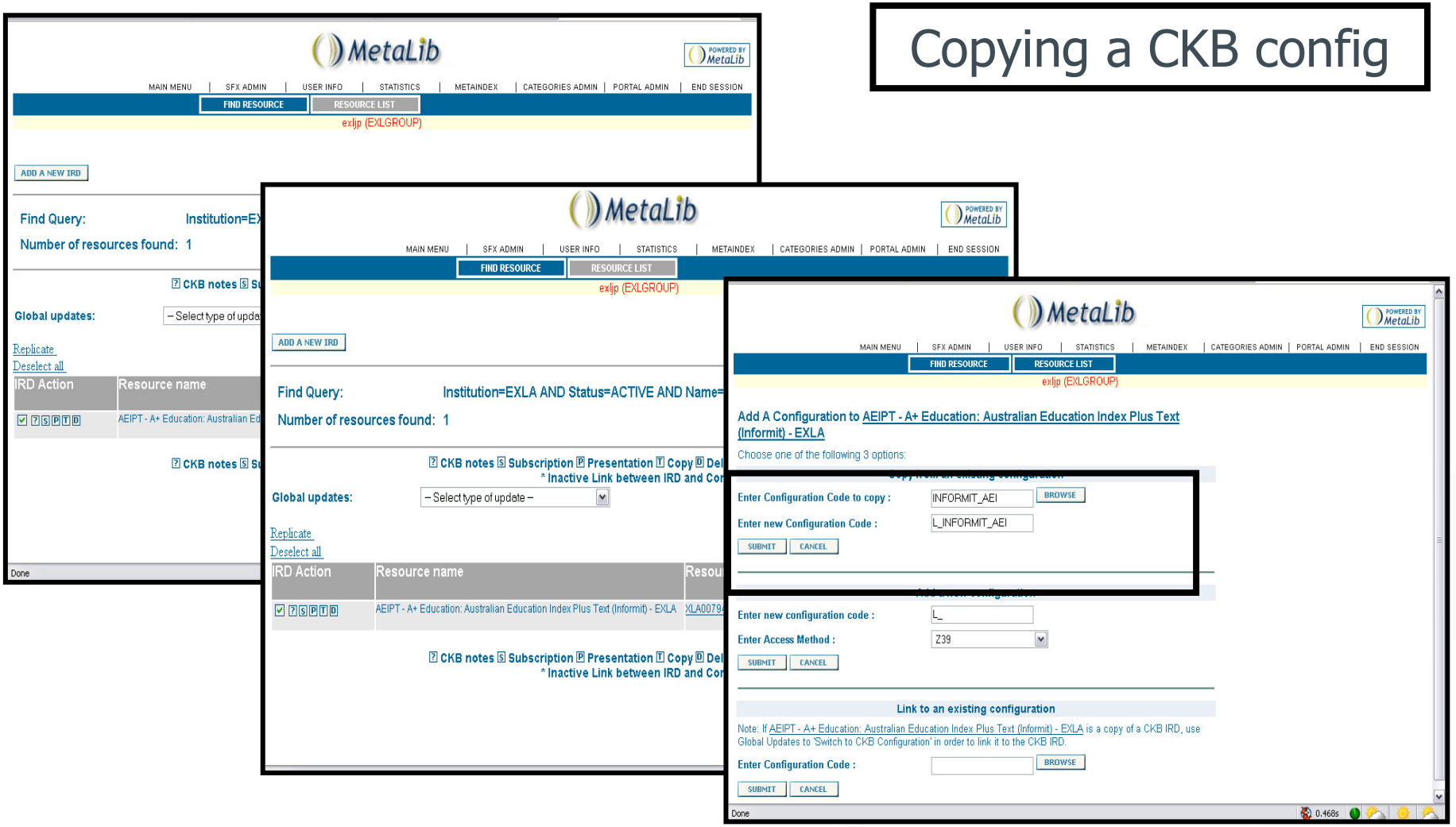
Step 3 - Create, link or copy Configuration record

Copying a CKB config

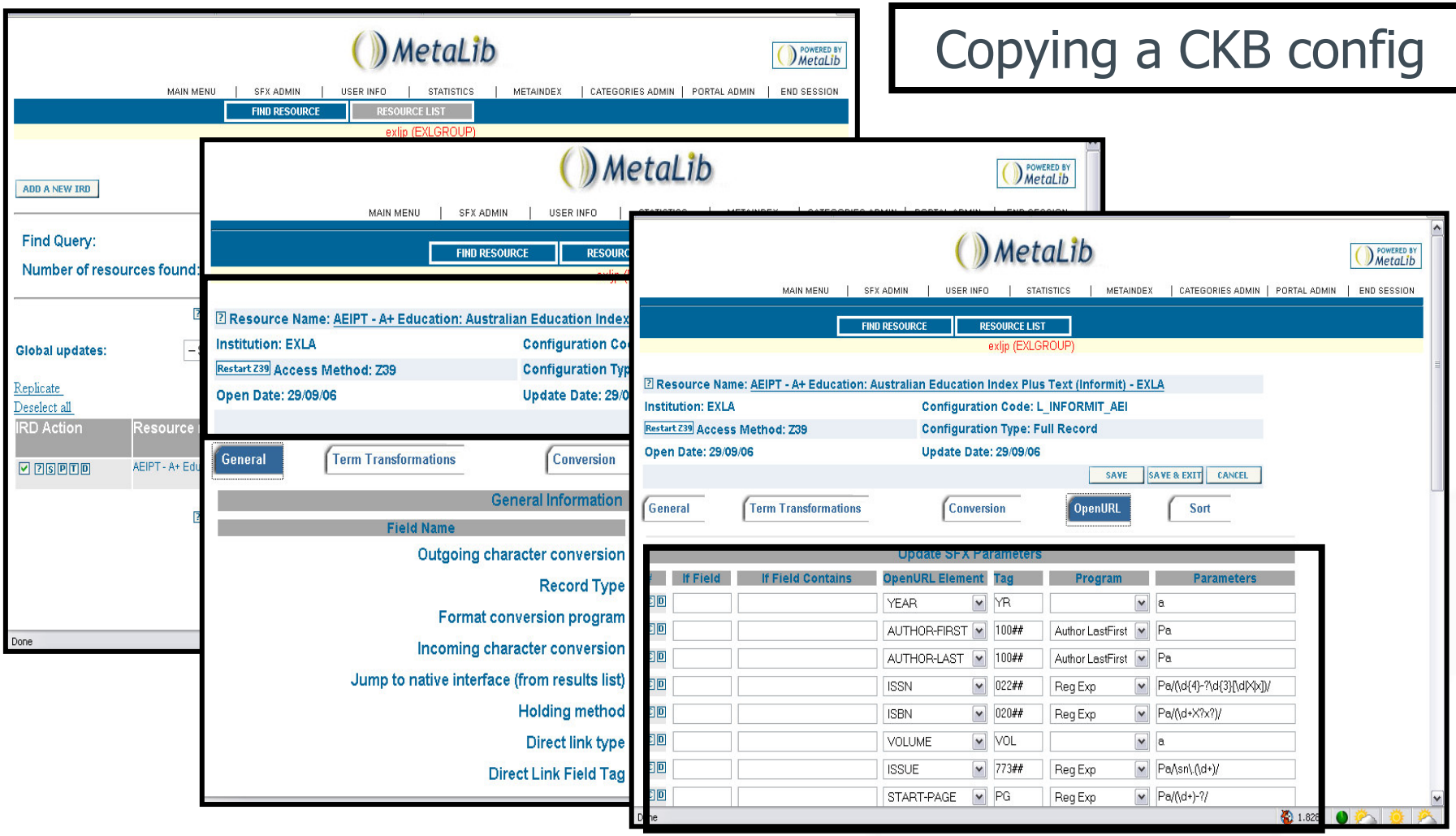
- CKB configurations, in the METALIB institution, cannot be edited
- Libraries wishing to edit a CKB configuration must create a local copy in their LKB first
  - Note: this is not recommended as the configuration will no longer be linked to the MetaLib institution and will not be automatically updated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

Step 3 - Create, link or copy Configuration record

Copying a CKB config



Step 3 - Create, link or copy Configuration record



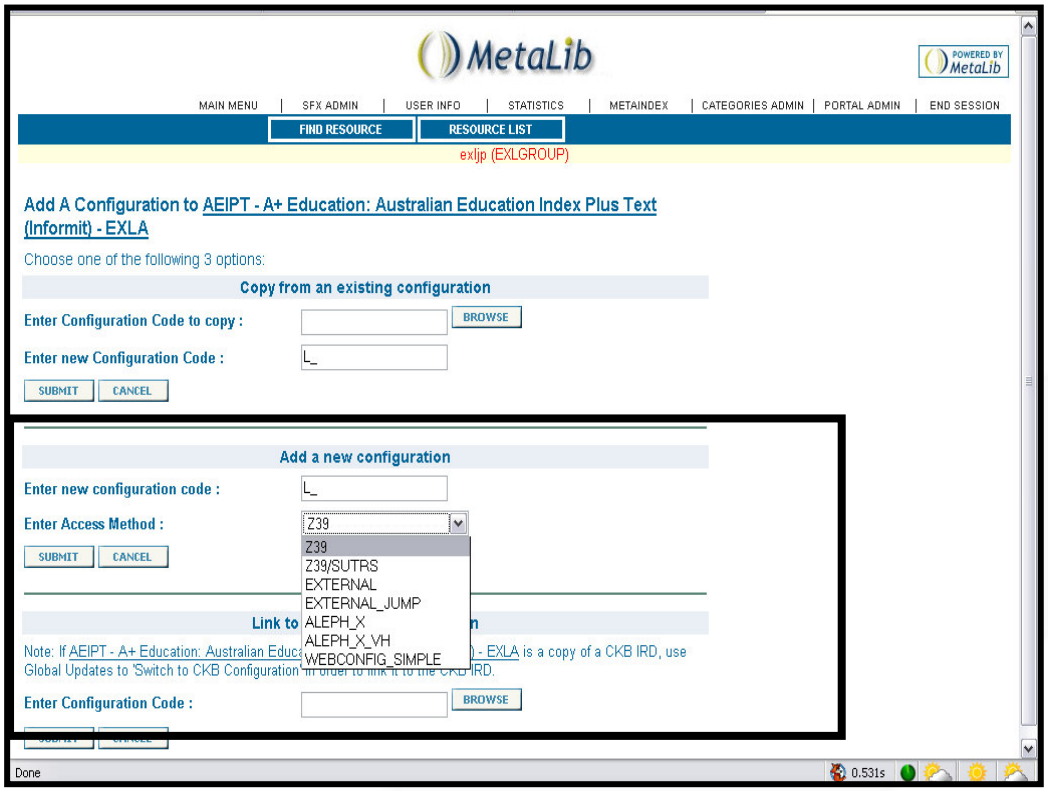
Copying a CKB config

ExLibris MetaLib

Step 3 - Create, link or copy Configuration record

Creating a CKB config

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



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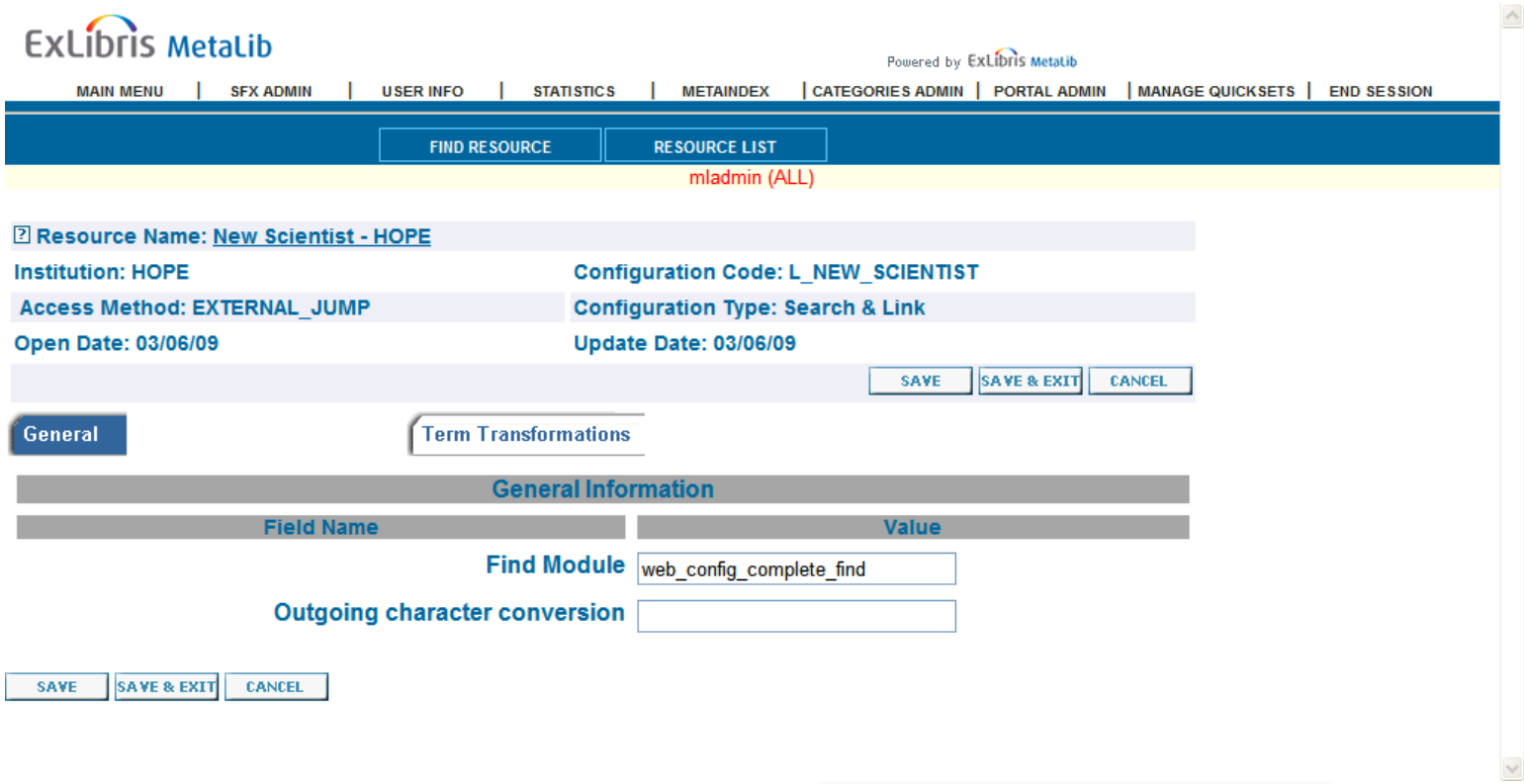
Step 3 - Create, link or copy Configuration record

Creating a CKB config

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



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Hands On

Exercise 4 – Add a configuration

Create a EXTERNAL_JUMP_SIMPLE configuration

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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

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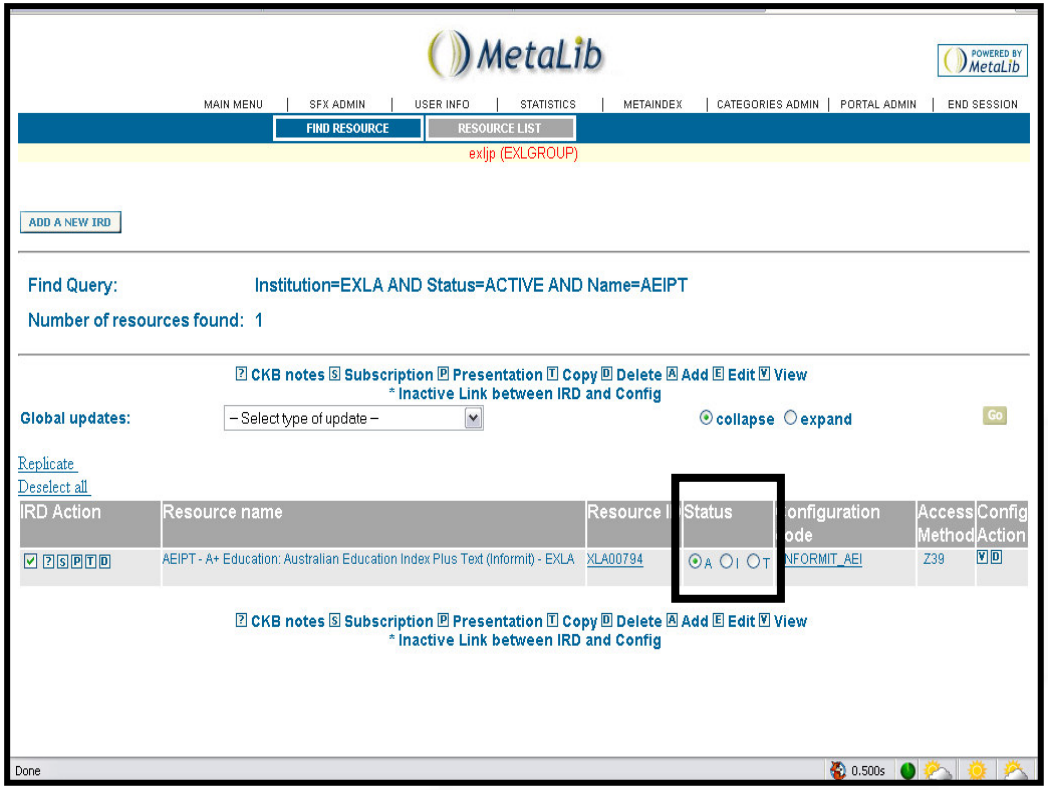
Step 4 – Activate, test & make corrections

Activate

- Set status of resource to Active or Testing



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Step 4 – Activate, test & make corrections

Activate

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

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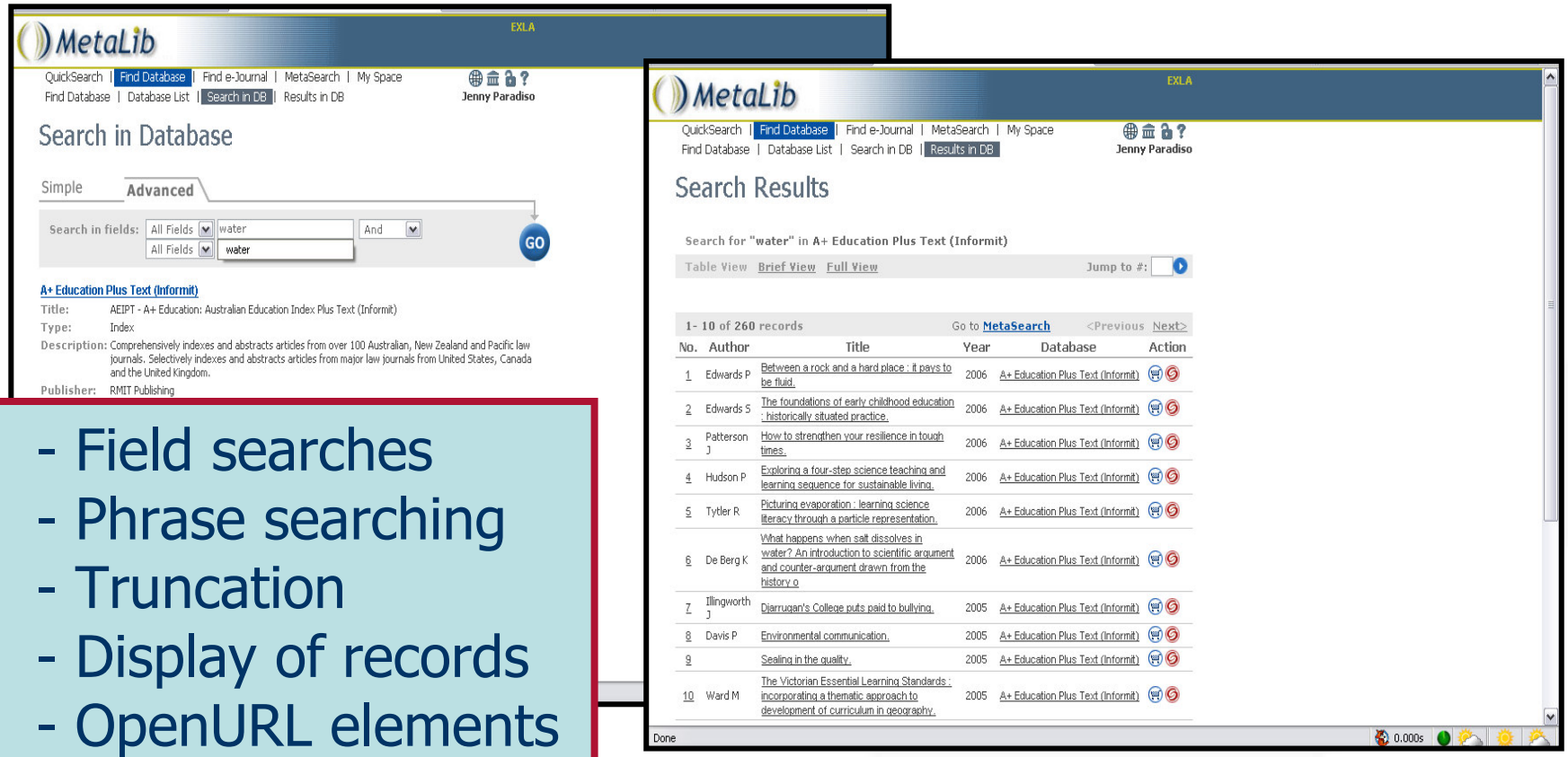
Step 4 – Activate, test & make corrections

Test

- Test resource in the MetaLib User Interface



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

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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)
```


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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

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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

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Other KB Tools

- CKB Update
- Import / Export

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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

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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

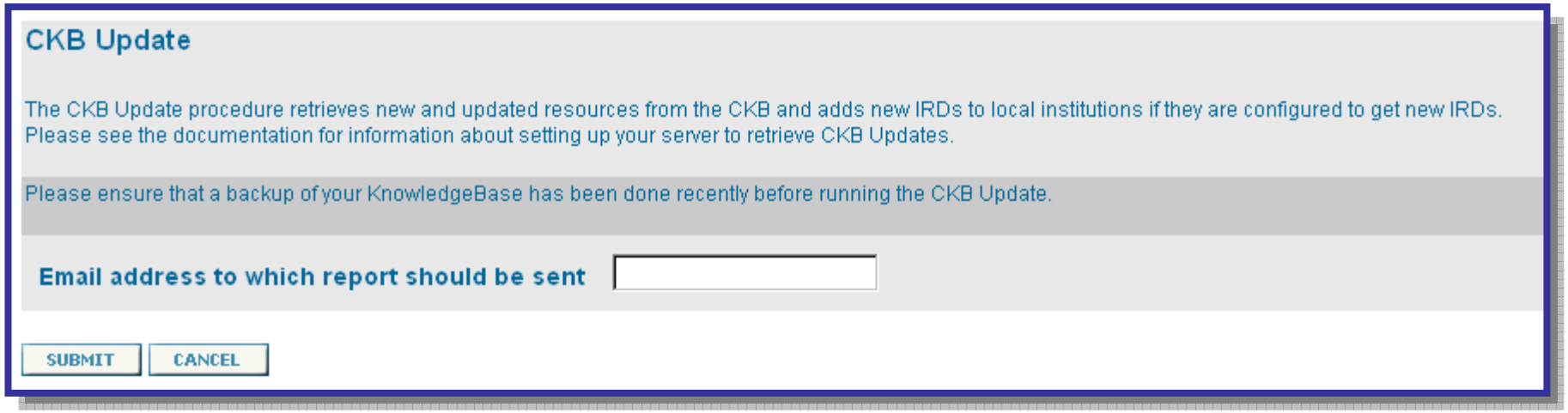
ExLibris MetaLib

Export and Import Procedures

ExLibris MetaLib

CKB Update: Initial Form

Process initiated from CKB Update form in /M



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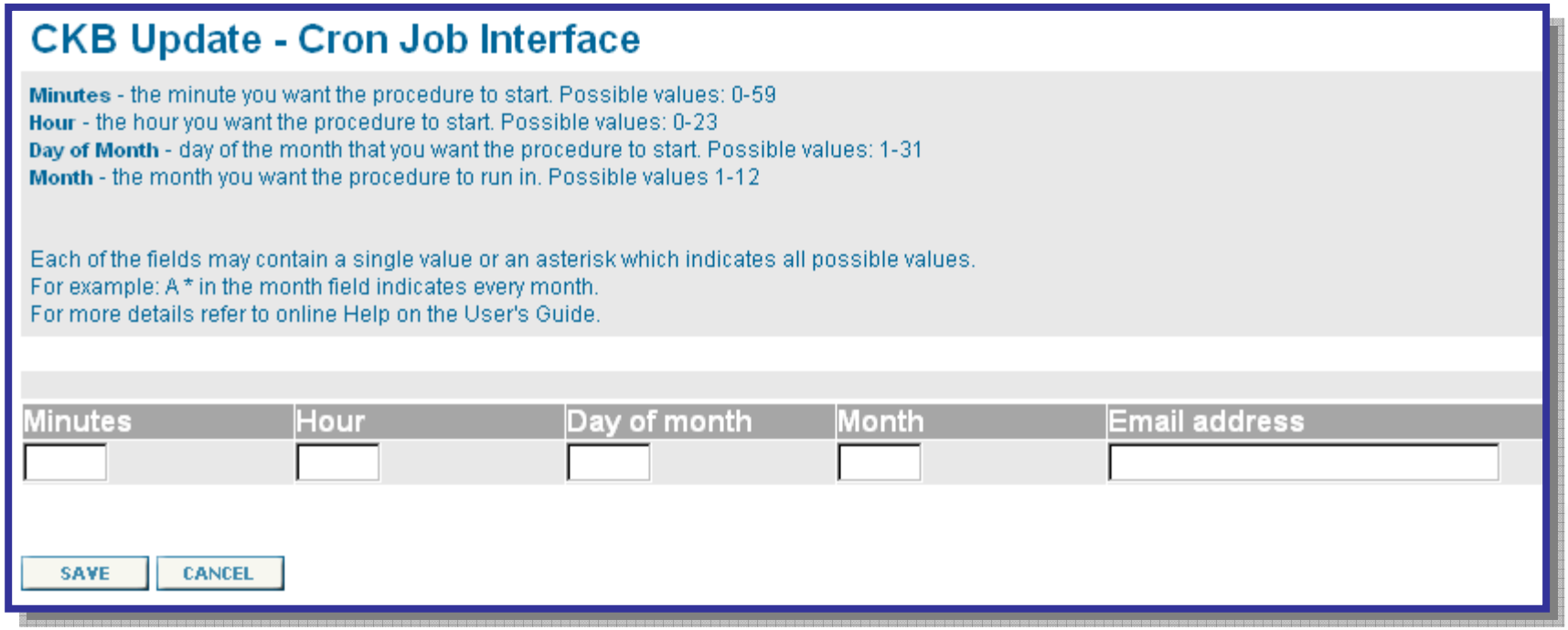
CKB Update: Cron Job Interface



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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

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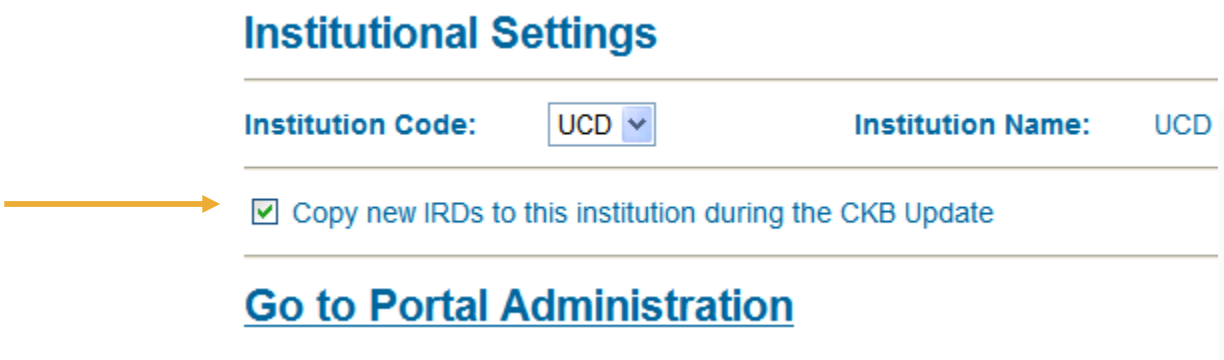
Configuring Institutional Settings

- 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



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Thank You!

leonard.wright@exlibrisgroup.com