



Customizing the User Environment


















Customizing the User Environment
















Table of Contents

| | |
|-------------------------------------|----|
| Key MetaLib Icons | 3 |
| Common Alternate MetaLib Terms..... | 5 |
| MetaLib System Parameters | 6 |
| Deeplinking Help Sheet..... | 13 |
| Deeplinking Exercise | 16 |
| QuickSearch Box – Demo Server | 17 |
| QuickSearch Box..... | 18 |
| MetaSearch Box – Demo Server | 19 |
| MetaSearch Box..... | 20 |

Key MetaLib Icons

Icons are found in `./insnn/icon_eng`. Do not change icon names. Banner icons are `v-Header2.gif` (400 x 42) (MetaLib icon) and `v-Header` (1x52) (background icon). Other icons are `.png`.

| Name | Icon | Size (hwxw) | Purpose | ALT tag |
|---|---|-------------|--|--|
| Locks | | | | |
| v-ico_lock |  | 16x16 | locked resource | Not authorized. Available only to authenticated users. |
| v-ico_lock_dis |  | 16x16 | disallowed resource | Not authorized. Available only to authenticated users. |
| SFX icons | | | | |
| v-sfx |  | 16x16 | SFX link in results | SFX |
| v-sfx-1 |  | 47x14 | SFX link in full record | SFX |
| Plus icon, "i" button, magnifying glass, "X" | | | | |
| v-add_favorite |  | 16x16 | add to My Databases, History | tag varies |
| v-icon-in_favorite |  | 16x16 | added to the above | tag varies |
| v-info |  | 16x16 | IRD information | Information |
| v-search_more |  | 16x16 | search database individually | Search in database |
| v-icon_delete |  | 16x16 | delete record or item | Delete |
| Searching | | | | |
| v-b_go |  | 36x36 | run search | GO |
| v-go |  | 16x16 | search within a list; locate in MetaSearch | tag varies |
| v-b_more3 |  | 21x29 | link to results in native interface | View results |
| Global Navigation Bar | | | | |
| v-login |  | 16x16 | login | Login |
| v-logout |  | 16x16 | logout | Exit |
| v-help |  | 16x16 | help | Help |
| v-environment |  | 16x16 | change portal | Portal |

| | | | | |
|--------------------------------|---|-------|--|--|
| v-language |  | 16x16 | change language | Language |
| v-ico_exit |  | 16x16 | end session | End Session |
| Results List | | | | |
| v-icon-fulltext |  | 17x19 | fulltext from SFX | Fulltext available for Document number ... |
| v-icon-fulltext-notext |  | 17x19 | fulltext from SFX | (alternate icon to replace above) |
| v-icon_new_retrieved |  | 23x11 | indicates new record after retrieving more | no tag |
| Full Record | | | | |
| v-fulltext |  | 54x14 | fulltext from SFX | Full text available |
| v-original |  | 16x16 | original record | View Original Format |
| v-icon-save |  | 16x16 | save record to folder | Save record |
| v-icon-send |  | 16x16 | email record | Send to |
| Folders, Sets, My Space | | | | |
| v-icon_clear |  | 16x16 | delete sets and folders; clear lists and clipboard | tag varies |
| v-icon_new |  | 16x16 | new folder, new set | Create new set; New |
| v-icon_rename |  | 16x16 | rename sets and folders | Update; Rename |
| v-icon_save_as |  | 17x16 | save records to folders; save databases to sets | Save As |
| Basket | | | | |
| v-icon_add-to-basket |  | 16x16 | select record | Add to Basket |
| v-icon-in-basket |  | 16x16 | record selected | Record in Basket |

Common Alternate MetaLib Terms

Most terms in the MetaLib user interface are changed through a global translation table `./insnn/tab/www_const.eng`. **MetaLib V4 standard Help files take some, but not all changes from `www_const.eng`.** See the *User Interface Guide*.

| MetaSearch / MetaLib | | | |
|---|----------------------|--------------------|-----------------------|
| Cross Search | CrossSearch | Expanded Search | Multi-Database Search |
| Search It | One Search | Power Search | Multi Search |
| Custom Search | SuperSearch | MetaQuest | Advanced Search |
| Library Portal | Expert Search | Build-A-Search | Find It Fast |
| Find Database | | | |
| Database Finder | Find By Subject | Find a Database | Databases |
| Find E-Resources | Indexes / Databases | | |
| Find Database: Title, Category, Locate Tabs | | | |
| By Name | Subjects | By Subject | By Subject Category |
| By Database Name | Databases by Subject | Subject Categories | Databases by Category |
| By Vendor | By Keyword | Keyword | Locate Databases |
| Other Options | | | |
| QuickSearch | | | |
| Basic Search | QuickSets | QuickStart | Quick Searches |
| Quick Search Sets | Basic Search Topics | | |
| My Space / Basket (references to the eShelf and Basket are also found in <code>www_heading.eng</code>) | | | |
| My Research | My Resources | My Folder | My Basket |
| My Results | My BookBag | Marked Items | My <branded name> |
| eShelf / Basket (reference to the eShelf and Basket are also found in <code>www_heading.eng</code>) | | | |
| Selected Results | My Articles | My Citations | My Results |
| My Items | My Shelf | My List | Marked Items |
| Marked List | | | |

Table View (in results): Results List

Selected (in eShelf): Email/Save; Save/Email Citations

History (in My Sets): Saved Searches



Customizing the User Environment

MetaLib System Parameters

All parameters listed here can be found in the `www_server.conf` table under: `/exlibris/metalib/m4_n/metalib_conf/` In a consortia, system parameters are shared across all institutions sharing the MetaLib installation. For more information, see the *User Interface Guide* (many sections) and *System Configuration Guide* Section 6, 7. Default values listed are for new North American installations only.

| General Parameter Name | Parameter Purpose | Default | Comments |
|---------------------------------|---|---|--|
| setenv metalib_entry_page | Determines which module will be shown to users when entering the user interface. | QuickSearch | Options are: home : default MetaLib home page quick-1 : QuickSearch module find-db-1 : Find Database module meta-1 : MetaSearch module |
| setenv metalib_home_page | Determines which module will be shown to users when logging in or switching portals.. | QuickSearch | Options are: home : default MetaLib home page quick-1 : QuickSearch module find-db-1 : Find Database module meta-1 : MetaSearch module my-space-1 : My Space |
| setenv www_show_restricted | Defines whether or not users will see resources they cannot search (i.e., locked resources). | Y (Display all resources, locked and unlocked). | Options are: Y or N |
| setenv WWW_V_SESSION_TIMEOUT | Defines the period of time (in seconds) without user interaction that will lead to the user's session expiration. | 900 (seconds; 15 minutes) | The default is 15 minutes, measured in seconds (900 seconds). The minimum session timeout is 5 minutes (300 seconds). |
| setenv EXT_USER_DEFAULT_PROFILE | Determines which default profile to show for the main MetaLib URL. | METALIB-ENG | For most sites, this should be changed to INST-ENG-GUEST, where INST is the institution code. |
| setenv EXT_USER_INSTITUTE | Determines the default institute. | METALIB | For all sites, this should be changed to the institution code. In consortia, a default institution must be chosen. |



Customizing the User Environment

| Search Parameter Name | Parameter Purpose | Default | Comments |
|---------------------------------|---|------------|--|
| setenv default_search | Defines the default search tab for all modules (simple or advanced). | Simple | Options are: Simple or Advanced |
| setenv www_metalib_search_limit | Defines the number of databases that can be searched together. | 10 | 10 is the maximum number of databases recommended by Ex Libris. Raising this number may negatively affect response time. |
| setenv max_search_wait | Defines the threshold queuing period (in seconds) for a search. When a search is queued for a longer period, the search is suspended. | 60 seconds | 90 seconds is another common default. |

| Results Parameter Name | Parameter Purpose | Default | Comments |
|---|---|--|--|
| setenv no_fetched_result | Defines how many records will be fetched from each resource. | 30 | 30 is the maximum recommended number of records per database. Raising this number may negatively affect response time. |
| setenv www_v_sort_results | Defines the default sort for merged results lists. Results are sorted twice. | 06---D01---D rank 06 -- descending (D) year 01 -- descending (D) | Options are: 01 (year); 02 (author); 03 (title); 05 (database); 06 (rank) Each sort is (A)scending or (D)escending |
| setenv check_full_text_avail | Enables fulltext indicators in MetaLib records. The SFX API is queried to determine if full text services are available for a given record. | All (fulltext indicators appear on all record views) | Options are: "None" (no indicators) "Table-Brief" (table/brief views) "Full only" (only full view) "All" (all views) |
| setenv CLUSTER_FACET | Enables Clusters and Facets in merged results lists. | Y (enable Clusters/Facets) | Options are: Y or N |
| setenv enable_ranking | Ranks merged results lists using the MetaLib ranking engine. | Y (enable ranking) | Options are: Y or N |
| setenv enable_dedupe | Marks duplicate records on merged results lists. Duplicate records are tagged with the following text: "Duplicate item -- see #xx" | Y (enable de-duplication) | Options are: Y or N |
| setenv compress_dedupe | Merges duplicate records into a single line in the results lists. Duplicate records are still tagged as above. | Y (compress duplicates) | Options are: Y or N |
| Show Brief View (with citations) rather than Table View in results list | n/a | n/a | This feature is controlled through Default Users via the /M. |
| Show more than 10 results per page | n/a | n/a | This feature is controlled through Default Users via the /M. |



Customizing the User Environment

| QuickSearch Parameter Name | Parameter Purpose | Default | Comments |
|----------------------------|--|---|---|
| setenv Q_JUMP_TO_RESULTS | Determines whether the Search Summary screen will remain visible in the QuickSearch module or whether users will move immediately to the results list. | Y (Jumps to results) | Options: Y or N |
| setenv www_quick_threshold | Determines when QuickSets will appear unlocked. A set is unlocked when the percentage of free resources meets or exceeds the threshold. | 0.8 (QuickSets are unlocked when 80% or more of the resources are free). | Options: 0.1 to 0.9 |
| setenv www_v_my_sets_order | Determines how personal QuickSets (My Sets) will display in relation to library-defined QuickSets. | 1 (MySets display <u>above</u> library QuickSets) | Options are: 0 - MySets will <u>not display</u> . 1 - MySets display <u>above</u> library QuickSets. 2 - MySets display <u>below</u> library QuickSets. |



Customizing the User Environment

| Find Database Parameter Name | Parameter Purpose | Default | Comments |
|---|---|----------|--|
| setenv find_db_default_tab | Defines the default tab shown in the Find Database module (Titles tab, Category tab, Locate tab). | title | Options are: Title , Category , or Locate |
| setenv find_db_title_search_type | Defines default radio button selected in the Find Databases Titles tab (Starts with, Contains, or Exact). | contains | Options are: Start , Contains , or Exact |
| setenv www_ird_browse_limit | Sets the number of resources on a page appearing in MetaSearch and Find Databases. | 10 | Options are: 10 to 99 |
| Show Brief View (descriptions) rather than Table View (no descriptions) | n/a | n/a | This feature is controlled through Default Users via the /M. |
| Show customized Types rather than standard Types | n/a | n/a | This feature is controlled through server tables and the IRD. |
| Show database icons (new, fulltext) next to database names | n/a | n/a | This feature is controlled through the IRD. |



Customizing the User Environment

| MetaSearch Parameter Name | Parameter Purpose | Default | Comments |
|---------------------------------|--|---|--|
| setenv M_JUMP_TO_RESULTS | Determines whether the Search Summary screen will remain visible in the MetaSearch module or whether users will move immediately to the results list. | N (Search Summary screen remains visible) | Options are: Y or N |
| setenv meta_identify_default | Defines which option will display by default in the drop-down menu under "Select Search Type". | QuickSets | Options are: QuickSets; Locate; Category; New MySets (personal QuickSets) |
| setenv www_v_ird_selected_limit | Determines whether databases will appear checked or unchecked. The databases in MetaSearch will appear unchecked if the number of databases in the set exceeds this parameter. | 10 | This number may not exceed the metalib_search_limit (above), which controls the number of databases that can be searched together. |

| PDS, Self-Registration, and Systems Parameter Names | Parameter Purpose | Default | Comments |
|---|--|--------------|--|
| setenv guest_bypass_pds | Bypasses the authentication module when authentication is not needed. This should be set to Y by most sites to improve performance. | Y (bypass) | Options are: Y or N Set to N for sites using SS0 |
| setenv self_reg | Enables/disables self-registration. Self-registration allows users to create their own accounts for personalization. | N (disabled) | Options are Y or N . Self-registration is recommended only in closed environments. |
| setenv self_reg_secondary_affiliation | Allows sites using self-registration to control the access rights of self-registered users. | GUEST | Options are: BLANK (users can access all databases) GUEST (users can access free databases only) <GROUP> (users can access databases for their user group) |
| setenv log_level | Sets the level of log reporting on the server. For best performance, set the log to the lowest level needed. INFO can be used for debugging. | ERROR | Options are: STAT --statistical info only FATAL --stat plus critical errors ERROR --fatal plus non-critical errors WARN -- error plus minor errors INFO -- warn plus all transactions messages |
| setenv show_comments_in_HTML | Determines whether commented lines will be visible in the source code or not. | Y | Options are: Y or N |



Customizing the User Environment

Deeplinking Help Sheet

Deeplinks can be created manually, or generated via the Management interface (/M).

http://hostname:port/V/?

Common Functions -- there is only one function per link

| | |
|-----------------------|--------------------------------------|
| ?func=quick-1 | [first page of QuickSearch module] |
| ?func=meta-1 | [first page of MetaSearch module] |
| ?func=find-db-1 | [first page of Find Database module] |
| ?func=eshelf-2 | [first page of MySpace module] |
| ?func=load-login | [begin the PDS login process] |
| ?func=quick-1-check-1 | [search in QuickSearch module] |
| ?func=meta-1-check | [search in MetaSearch module] |

Access Control Parameters

| | |
|---|---|
| &institute= | [institute code] |
| &portal= | [portal code] |
| &force_login=y | [call the PDS login screen before executing the link] |
| ?func=change-portal-1 &portal-name=XXX | [change portals; XXX=portal name] |

QuickSearch Parameters

| | |
|-----------------------|---|
| ?func=quick-1-check-1 | [search in QuickSearch module] |
| &group_number= | [search a QuickSet -- uses system number] |

MetaSearch Parameters -- "Identify Database" menu

| | |
|--------------------------|---|
| ?func=meta-1 | [first page of MetaSearch module] |
| &init_type=QuickSetsList | [open to QuickSets] |
| &init_type=CategoryList | [open to Categories] |
| &category= | [open to category -- uses system name] |
| &sub_cat = | [open to subcategory -- uses system name] |
| &init_type=LocateList | [open to Locate] |
| &init_type=MySetsList | [open to personal sets] |
| &init_type=NewList | [open to new databases as defined in IRD] |

MetaSearch Parameters -- searching in MetaSearch

?func=meta-1-check [search in MetaSearch module]
 &ckbox= [search a database -- uses local IRD number]

Find Database Parameters

?func=find-db-1-title [open the title tab in Find Database]

&mode=titles [search by title in Find Database]
 &search_type=start [use start radio button]
 &search_type=contains [use contains radio button]
 &search_type=exact [use exact radio button]

&scan_start=g%3F [search by letter of the alphabet]
 &scan_start=1%3F [search by number]
 &scan_start= [put user term into the title box]

?func=find-db-1-locate [open the locate tab in Find Database]

&mode=locate [search by locate in Find Database]
 &F-WCL= [search by title in locate]
 &F-WPB= [search by vendor in locate]
 &F-WFL= [search by category in locate -- uses system number]
 &F-WRD= [search by keyword in locate]
 &F-WTY= [search by type in locate]

?func=find-db-1-category [open the category tab in Find Database]

&mode=category [search by category in Find Database]
 &sequence= [open to a category/subcategory pair --
 uses system number]

&restricted=unrestricted [search only for unrestricted databases]
 &restricted=all [search for all databases]

Simple Search Parameters -- all searches are keyword

&mode=simple [set to simple search mode]
 &find_request_1= [put user term into search box]

Advanced Search Parameters

| | |
|-------------------|--|
| &mode=advanced | [set to advanced search mode] |
| &find_request_2= | [first search box in advanced search] |
| &find_code_2=WRD | [first search box set to keyword field] |
| &find_code_2=WSU | [first search box set to subject field] |
| &find_code_2=WTI | [first search box set to title field] |
| &find_code_2=WAU | [first search box set to author field] |
| &find_code_2=ISSN | [first search box set to ISSN field] |
| &find_code_2=ISBN | [first search box set to ISBN field] |
| &find_code_2=WYR | [first search box set to year field] |
| &find_request_3= | [second search box in advanced search] |
| &find_code_3=WRD | [second search box set to keyword field] |
| &find_code_3=WSU | [second search box set to subject field] |
| &find_code_3=WTI | [second search box set to title field] |
| &find_code_3=WAU | [second search box search set to author field] |
| &find_code_3=ISSN | [second search box set to ISSN field] |
| &find_code_3=ISBN | [second search box set to ISBN field] |
| &find_code_3=WYR | [second search box set to year field] |
| &find_op_1=OR | [use OR operator between search boxes] |
| &find_op_1=AND | [use AND operator between search boxes] |
| &find_op_1=NOT | [use NOT operator between search boxes] |

Notes

Deep links use + for spaces and coding for special characters

Deeplinking Exercise

```
<html>
<body>

<H3>Deep Linking Exercise: Instructions</H3>

1. Perform a search in any QuickSet. <P>

2. Right click on the QuickSet name, choose "Properties". Copy and Paste the entire
   URL here (you may need to scroll down):<P>

3. What is the group_number for your QuickSet? Copy the group_number and
   replace the XXXXXXXXXX below with with the number.<P>

4. Replace XXX.XXX.XXX.XXX:XXXX below with the base url of your MetaLib
   server.<P>

5. Click "File -- Save As.." Replace ".txt" with ".html" in the name of this page.
   <P>

6. Open this page in a web browser<P>

<H1>Search Our Library Resources</H1>

<table border=1>
<tr>
<td>
<strong>Search:</strong>
</td>
<td>
<form method="get" action="http://XXX.XXX.XXX.XXX:XXXX/V/?" target="_blank">
<input name="func" value="quick-1-check1" type="hidden" />
<input name="mode" value="simple" type="hidden" />
<input name="group_number" value="XXXXXXXXXX" type="hidden" />
<input name="find_request_1" size="25" value="" type="text" />
<input type="submit" value="GO">
</form>
</td>
</tr>
</table>
</body>
</html>
```


QuickSearch Box – Demo Server

```
<html>
<head></head>
<body>
<H2>QuickSet Search Box - MetaLib Demo Server</H2>
<P>
This searchbox goes to a QuickSet on the MetaLib Demo Server.<br>
Each MetaLib QuickSet has a unique identifier called a group_number.<br>
You can search a different QuickSet by changing the group_number in the HTML for
this page.<br>
<P>

<H1>Search Our Library Resources</H1>

<table border=1>
<tr>
<td>
<strong>Search:</strong>
</td>
<td>
<form method="get" action="http://metalib-demo.exlibrisgroup.com/V/?"
target="_blank">
<input name="func" value="quick-1-check1" type="hidden" />
<input name="mode" value="simple" type="hidden" />
<input name="group_number" value="000001144" type="hidden" />
<input name="find_request_1" size="25" value="" type="text" />
<input type="submit" value="GO">
</form>
</td>
</tr>

</table>
</body>
</html>
```

QuickSearch Box

```
<html>
<head></head>
<body>
<b>Simple Search Box</b>
<P>
The group_number for a QuickSet can be seen by right-clicking on the QuickSet and
viewing the full URL under "Properties".
<P>

<H1>Search Our Library Resources</H1>

<table border=1>
<tr>
<td>
<strong>Search:</strong>
</td>
<td>
<form method="get" action="http:// XXX.XXX.XXX.XXX:XXXX /V/?"
target="_blank">
<input name="func" value="quick-1-check1" type="hidden" />
<input name="mode" value="simple" type="hidden" />
<input name="group_number" value="000000XXX" type="hidden" />
<input name="find_request_1" size="25" value="" type="text" />
<input type="submit" value="GO">
</form>
</td>
</tr>

</table>
</body>
</html>
```

MetaSearch Box – Demo Server

```
<html>
<head></head>
<body>
<H2>MetaSearch Box - MetaLib Demo Server</H2>
<P>
This search box brings together specific resources on the MetaLib Demo Server.<br>
Using MetaSearch, you can search any combination of your library databases
together.<br>
I have chosen an interdisciplinary set of resources to illustrate this feature.
<P>
The "ckbox" value in the HTML for this page is the unique identifier for each
resource.<br>
<P>

<H1>Search Medical Sociology Resources:</H1>

<table border=1>
<tr>
<td>
<strong>Search:</strong>
</td>
<td>

<form method="get" action="http://metalib-demo.exlibrisgroup.com/V/?"
target="_blank">
<input name="func" value="meta-1-check" type="hidden"/>
<input name="mode" value="simple" type="hidden"/>
<input name="find_request_1" size="40" value="" type="text"/>
<input name="ckbox" value="EXL04210" type="hidden"/>
<input name="ckbox" value="EXL00677" type="hidden"/>
<input name="ckbox" value="EXL04176" type="hidden"/>
<input name="submit" value="go" type="hidden"/>
<input type="submit" value="GO">
</form>

</td>
</tr>
</table>

</body>
</html>
```

```
http://metalib-demo.exlibrisgroup.com/V/?func=meta-1-
check&mode=simple&find_request_1=shaman&ckbox=EXL02208&ckbox=EXL04210
&ckbox=EXL03992&ckbox=EXL03350&ckbox=EXL00677&ckbox=EXL05454&submit=
go
```

MetaSearch Box

```
<html>
<head></head>
<body>
<P>
Using MetaSearch, you can search any combination of your library databases
together.
<P>
The "ckbox" value below is a unique identifier for each resource and can be found
at the bottom of each IRD in MetaLib.
<P>

<H1>Search This Subject:</H1>

<table border=1>
<tr>
<td>
<strong>Search:</strong>
</td>
<td>

<form method="get" action="http:// XXX.XXX.XXX.XXX:XXXX /V/?"
target="_blank">
<input name="func" value="meta-1-check" type="hidden"/>
<input name="&mode" value="simple" type="hidden"/>
<input name="&find_request_1" size="40" value="" type="text"/>
<input name="&ckbox" value="ABCXXXXX" type="hidden"/>
<input name="&ckbox" value="ABCXXXXX" type="hidden"/>
<input name="&ckbox" value="ABCXXXXX" type="hidden"/>
<input name="&ckbox" value="ABCXXXXX" type="hidden"/>
<input name="&ckbox" value="ABCXXXXX" type="hidden"/>
<input name="&submit" value="go" type="hidden"/>
<input type="submit" value="GO">
</form>

</td>
</tr>
</table>

</body>
</html>
```