



MetaLib Version 4.3.0 (404-548)

Release Notes

March 2009

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1. Introduction

1.1. Purpose and Scope

This document describes the functional and technical changes included in this Minor Release and provides implementation instructions where appropriate.

Note: This document details the changes included in the current Minor Release only.

1.1.1. Minor Release Name and Number

MetaLib Minor Release 4.3.0(404-548), March 2009

1.1.2. Minor Release Highlights

This document describes the enhancements and changes included in MetaLib Minor Release 4.3.0. It contains cross-references to the relevant documentation for detailed descriptions and implementation of new and updated functionality.

MetaLib 4.3.0 is the third planned minor release in our current MetaLib 4 road map. The key focus areas of MetaLib 4.3.0 are as follows:

- Improved back-office processes to further reduce MetaLib's total cost of ownership for our customers by streamlining product implementation and maintenance workflows.
- New, easy-to-use integration tools.
- High-priority enhancements from the first-ever IGeLU and ELUNA enhancement process and numerous X-Server enhancements requested by the IGeLU/ELUNA X-Server SIG.

A number of developments in Minor Release 4.3 focused on enhancing the back office (the "/M") functionality of MetaLib:

1. Moving key setup tables from server-based files to Oracle tables and the back-office interface
2. Adding wizards to simplify key workflows

These developments include:

- Initial and Ongoing back-office menus
- A new concept: default users become default profiles

- The functionality of the `default_z312` table has moved to the MetaLib Management interface (/M)
- New roles and role oriented menus for staff users
- The functionality of the `tab_management` table has moved to the MetaLib Management interface (/M)
- A new wizard to initially activate or subsequently update CKB resources in the MetaLib Management interface (/M)
- A new Look and Feel customization wizard in the MetaLib Management interface (/M)
- A new wizard to set-up and maintain QuickSets in the MetaLib Management interface (/M)
- A new Deep Link Generator in the MetaLib Management interface (/M)
- Access to the PDS Administration module from the MetaLib Management interface (/M)

Other key developments in version 4.3 include:

- A new peer-review indicator added to MetaLib search results

Note: The SFX Knowledge Base must be populated with peer-review information so that MetaLib can display the peer-review indicator when relevant. This process is ongoing. The SFX Knowledge Base will include an increasing amount of peer-review information in the months ahead. As the SFX Knowledge Base is enriched with this additional information, the number of relevant records that display the peer-review indicator in MetaLib will also increase.

- New citation management options: Save to EndNote Web and Save to RIS format
- Support for including URL in descriptive fields of the resource IRD
- Support for defining multiple Resource Types per resource
- A new summary view in the IRD for resource categories/sub-categories assigned to a resource
- A consolidated log file for MetaIndex, accessible via the MetaLib Management interface (/M)
- Password encryption for staff and other local users to enhance security

1.2. Revised Documentation

The MetaLib technical documentation has been reorganized and reformatted for the 4.3 minor release. The previous documents have been combined, edited, and restructured into four guides. For more details, see section [1.7](#).

1.3. How to Download and Install the 4.3 Minor Release

If your current version of MetaLib is SP 4.2.2, the Service Pack Management utility (see [Figure 1](#)) allows you to download and install Service Packs.

```

SP.  Service Pack Management
-----
    0.  Exit Procedure
    1.  Prepare/Update Environment
    2.  Download latest SP
    3.  Check SP Download status
    4.  Install SP
    5.  Run SP Utility
Please select [exit]:

```

Figure 1. Service Pack Management Menu

Note: Previous versions of MetaLib require you to download the SP from the FTP site manually prior to installation.

To download the latest SP:

1. Enter the following commands to display the Libraries Utility menu (see [Figure 2](#)):

```

dlib vir00 (or dat01...)

util

```

```

      Library Utilities
      =====
A.  File administration and building
F.  View procedures and files
G.  Tables for defining database structure
K.  MetaLib Users Management
O.  ORACLE Management
S.  System Utility
SP. Service Pack Utility
T.  MetaLib Setup
W.  Server Management (Monitor, Stop, Start, Log files)
X.  Clean up
Y.  License Management
Please select [exit]:

```

Figure 2. Library Utilities Menu

2. Enter **SP** to display the Service Pack Management menu (see [Figure 3](#)):

```

SP.  Service Pack Management
-----
    0.  Exit Procedure
    1.  Prepare/Update Environment
    2.  Download latest SP
    3.  Check SP Download status
    4.  Install SP
    5.  Run SP Utility
Please select [exit]:

```

Figure 3. Service Pack Management Menu

3. Enter **2** to download the latest SP.

If the Service Pack Management utility has not been used before, the following prompts (as shown in bold type) display:

```

Creating first time configuration file...
Writing configuration...
SP Customer details
-----
Enter new values or press <Enter> to keep existing

Ex Libris customer code (country code + customer) []:

Customer mail address for download status notifications (leave empty for none) []
customer@email.com

Configuration summary:
-----
Language:                english
Customer code:
Notification address:    customer@email.com

Configuration has changed, do you want to save it?[y/n]
y
Writing configuration...
Press <Enter> to continue

```

Figure 4. Create SP Configuration File

Enter a new value at each prompt or press **ENTER** to retain the default value.

4. At the following prompt, press **ENTER** to continue the download and to return to the Service Pack Management menu:

```

Preparing to background download
Download Status will be sent to you by email and/or you can check status in step #3
FTP still running - please check ftp.log
Press <Enter>to continue

```

5. Enter **3** to check the status of the download.

Note: If you specified an e-mail address in the SP configuration file, an e-mail message will be sent when the download is complete. To set up your e-mail address, enter option **1** from the Environment Setting submenu.

6. When the download is complete, exit the MetaLib Library Utility menu.

You are now ready to start the installation of the SP, but first you must stop the MetaLib Web and search servers and the Apache server.

7. Enter the following commands to stop the MetaLib Web and search servers:

```
cd $metalib_conf
metalib_shutdown
```

8. Run the relevant commands to stop the Apache server, where *<n>* indicates the specific slot on which you are working.

For sites running MetaLib on a port higher than 1024:

```
cd /exlibris/metalib/m4_<n>/apache/bin
apachectl stop
```

For sites running MetaLib on a port number less than or equal to 1024 or for sites running Apache with SSL:

```
su
password: <root password>
cd /exlibris/metalib/m4_<n>/apache/bin
./apachectl stop
exit
```

9. Restart the SP Utility as previously described in Steps 1 and 2.

10. Enter **4** to start the installation of the SP.

Note: This option executes the `sp.install` script. For details, see the MetaLib Service Pack document.

11. If you need to install optional enhancements, enter **5** to run the `sp.utility` script. For details, see the MetaLib Service Pack document.

Note: Installation of the last item in the MetaLib 4.3.0 package may take a long time. This is normal and does not indicate that a problem with the SP process has occurred.

12. After the installation process has completed, exit the Service Pack Management menu.

13. Enter the following commands to restart the Web and search servers:

```
cd $metalib_conf
metalib_startup
```

14. Run the relevant commands in order to restart the Apache server, where *<n>* stands for the specific slot on which you are working.

For sites running MetaLib on a port number higher than 1024:

```
apcb
apachectl start
```

If the Apache server fails to start, enter the following commands to restart it:

```
apcb
apachectl stop
apachectl start
```

For sites running MetaLib on a port number less than or equal to 1024 or for sites running Apache with SSL:

```
su
password: <root password>
cd /exlibris/metalib/m4_<n>/apache/bin
./apachectl_auto
```

1.4. The New MetaLib Administrator Role and PDS Wizard Password

The `mladmin` user is a new out-of-the-box user that is assigned the MetaLib Administrator role. This user has full permissions that enable it to create users of any role for any group/institution.

Note: The `mladmin` user has the same permissions as the previously-used "S" user, but its privileges apply automatically to all groups/Institutions.

At the beginning of the SP installation, the installation script will display the following message, which prompts you to create the password for the `mladmin` user. The `mladmin` user and password will be used to enter the PDS Admin interface as well.

```
As part of MetaLib 4.3 Minor-Release, a new MetaLib Role is being created:
MetaLib Administrator with user name: mladmin
A password must be set to this user.
You can change the password in the Staff Admin page in a later time.
This username and password will be used for the PDS Admin interface as well.
Type your mladmin password here [mladmin]:
Retype your mladmin password [mladmin]:
Password successfully stored.
```

After you have entered the password, the installation script will run without further interruption for about two hours. When the script stops again, it will prompt you to run the automatic implementation actions.

Note: If the `mladmin` password is changed and forgotten, it can be re-created by executing Util T-4.

1.5. Re-indexing of DAT01

As part of the MetaLib 4.3 Minor Release, the system will re-index DAT01 automatically after the service pack has completed. The following message appears at the end of the service pack installation:

```
As part of MetaLib 4.3 Minor-Release, indexing of
the DAT01 database is necessary and
will be running in the background.
Notice, that this procedure can run between 30 minutes
to several hours (depending on the size of your database).
You can use the Service Pack utility in order to check the status of the
DAT01 indexing
Or
Refer to the log file: /exlibris/metallib/m4_3/tmp/p_index_dat01.log
```

The SP Utility option will appear at the end of the SP messages. If you choose **Y** for the UTIL request, you can choose the relevant option to check the status of the re-indexing process.

Optionally, to verify that the process has succeeded, you can view the following log file:

```
$TMPDIR/p_index_dat01.log
```

Note: If the CKB update is scheduled for the same time that the system is re-indexing DAT01, the CKB update will be stopped. The customer should either initiate the CKB update manually or update the CKB via the next monthly CKB update.

1.6. Validation Check of IP Ranges

Before the SP installation is started, the SP checks the IP ranges in the `default_z312` file to make sure that each IP range is not greater than 65,025 IPs. If any of the ranges are greater than 65,025, the SP will execute the uninstall procedure and display the following message:

```
Critical error: found the following range in default_z312: $from -
$to The range is too large to be converted automatically. You can
remark this line out (use !) and add it to the new IP RANGES
Management system interface after the installation completes, or
contact your local office.
```

In order to save time, MetaLib Support recommends that you perform a manual validation check of the `default_z312` table before installing the SP.

1.7. Related Documents and References

How to apply the Service Pack:

- *MetaLib Service Pack*

Release Notes for previous MetaLib 4.2.2 SP :

- *METALIB-4.2.2-ServicePackItemContent-385-403.*

For MetaLib X-Server users – refer to [EL Commons Developer Zone](#) for the latest X-Server user documentation.

Additional Documents:

In conjunction with the MetaLib 4.3 Minor Release, the core MetaLib user documentation was re-organized into the following four guides:

- The *MetaLib User Interface Guide* covers the following functionality:
 - The MetaLib user interface (/V)
 - Customization
 - Deep Linking
- The *MetaLib QuickSet and Category Administration Guide* contains all information relating to Quick Sets and categories.
- The *MetaLib Resource Management Guide* contains all information regarding resources and the Reports and Statistics module.
- The *MetaLib System Configuration and Administration Guide* covers the following functionality:
 - The MetaLib System Architecture

- Institutional settings in the MetaLib Management interface (/M)
- User administration
- Web, Search, and Apache servers
- MetaLib Library Utilities, including Oracle administration

2. Minor Release Content Summary

[Table 1](#) contains a list of corrections and enhancements that are included in this Minor Release.

Table 1: Corrections and Enhancements

#	Fix Number	Description	Module	Fix Type	Support Incident
1	404-405	Construct query An automatic tool that constructs a query (URL) for HTTP based resources. The data for the query construction is stored in a conf file under <code>dat01/external_conf/</code> (instead of the <code>z58</code>).	/M	Enhancement	
2	406	IP ranges table	/M	Enhancement	
3	407	Wizard to set-up and maintain QuickSets See section 3.1.	/M	Enhancement	
4	408	Wizard to activate or update CKB resources See section 3.2.	/M	Enhancement	
5	409, 410, 412	Staff users management (<code>tab_management</code>), Separate default profiles from local users See section 3.5.	/M	Enhancement	
6	411	Deep Link Generator See section 3.3.	/M	Enhancement	
7	413	Enable multiple resource types per resource See section 3.4.	/M	Enhancement	
8	414	Util K 3 is used to delete expired users. This utility will no longer delete default profiles (default users) when executed.	Server	Fix	
9	415	Internal.			
10	416	Two new filters have been added to the 'Find Databases' module: 'Entry date' and 'Last updated'.	/M	Enhancement	

#	Fix Number	Description	Module	Fix Type	Support Incident
11	417	Resource Categories summary via IRD – the possibility to display a summary of the resource categories/sub-categories assigned to a specific resource from the Categories tab of the IRD was added. For more details refer to the <i>MetaLib Resource Management Guide</i> .	/M	Enhancement	
12	418-420	Internal			
13	421	/M roles – new roles for staff users See section 3.5.	/M	Enhancement	
14	422	Including URL in IRD descriptive fields See section 3.6.	/M	Enhancement	
15	423	'Look and Feel' customization wizard See section 3.7.	/M	Enhancement	
16	424	Resource configuration: two new conversion tables have been added; unicode_to_8859_15_sz and 8859_15_sz_to_unicode	/M	Enhancement	
17	425	Re-organize /M main menu See section 3.5.	/M	Enhancement	
18	426	The passwords for staff users and default profiles (default users) are now encrypted in the relevant Oracle tables.	/M	Enhancement	
19	427	Internal			
20	428	There is now a centralized MetaIndex log for all MetaIndexes. The log includes all harvesting and load to database processes for both online and scheduled runs. The log can be viewed via /M and it can be filtered based on the following: Log Level, MetaIndex Code, Date, and Number of lines to display. A new parameter, MI_LOG_SAVE_DAYS (set by default to 3), in the <code>\$metalib_conf/metalib_start</code> file was added to determine the number of days to retain the MI log as a new file so that it will not be deleted when Util x-9" is executed.	/M	Enhancement	
21	429, 441	Internal			

#	Fix Number	Description	Module	Fix Type	Support Incident
22	430	<p>The ability to save a record to the user's PC in RIS format so it can be used in any citation management application chosen, is now supported.</p> <p>The ability to save a record to EndNote Web has been added. When this option is selected, EndNote Web will open and the login/password page will be displayed if the user isn't currently logged in to EndNote Web.</p> <p>Implementation of both new citation management options is optional. See sections 4.1 and 4.2.</p>	/M	Enhancement	
23	431, 442	New MetaLib branding (logo) will be implemented on /M at the login page, 'powered by' and main logo. On /V only the 'powered by' and main logo of MetaLib are changed; only in the default MetaLib instance (ins00).	/M	Enhancement	
24	432, 480	ELUNA X-Server SIG requests See section 3.9.	/M	Enhancement	
25	433	It is now possible to display a peer-review indicator for retrieved records in peer reviewed journals. The indicator will be displayed based on information received from SFX and only for records that are available in full text. For such records, a special icon instead of the regular full text icon will be displayed in all locations that the full text icon used to appear, indicating that the full text is peer reviewed. The full text records that are not peer reviewed will not be changed. Implementation is optional. See section 4.3.	/V	Enhancement	
26	434-437	Internal			
27	438	It is now possible to filter MetaLib reports and statistics for UI-based usage, X-Server-based usage, or 'all' usage.	/M	Enhancement	
28	439-440	Internal			
29	443-444	Internal			

#	Fix Number	Description	Module	Fix Type	Support Incident
30	445-471	<p>Update MetaLib's PDS module to latest fix level and provide access to PDS Admin from the MetaLib Management interface (/M).</p> <p><u>Notes:</u></p> <ol style="list-style-type: none"> 1. The new PDS Admin wizard will overwrite any comments previously entered in the tables. If you previously added comments to the tables, we recommend copying this information to a local file before executing the PDS Admin wizard. 2. When accessing the PDS Admin via the /M main menu, a username and password must be entered each time. 3. If PDS is configured to work with several LDAP servers, the PDS Admin will not be able to generate changes, and will provide this notification. 4. A new persistent cookie option was added. The default cookie is a session cookie, but it is now possible that PDS will be configured to use a persistent cookie. For more details refer to the Persistent Cookies section of the Patron Directory Services v 1.3 document under Cross-Product in the Documentation Center. 	/M	Enhancement	
31	472-475	Internal			
32	476	<p>Default profile for portal</p> <p>See section 3.8.</p>	/M	Enhancement	
33	477-478	Internal			
34	479	The IP loader utility now loads IPs to an Oracle table. The utility was modified to reflect the correct loading target and to update the name of the utility displayed to the user.	/M	Fix	
35	480	See 432.	/M	Enhancement	
36	481-490	Internal			
37	491	A new lock was established for the "ALL sub-categories" functionality in the Categories Administration module. Now, when one user executes this action it will be locked and will be re-opened only after the action has finished. Force Unlock is possible from UTIL T 6 on the MetaLib server in case the lock is not re-opened or this functionality needs to be cancelled.	/M	Enhancement	

#	Fix Number	Description	Module	Fix Type	Support Incident
38	492	KnowledgeBase Report can now run in the background due to a new flag, <code>knowledgebase_report_mail</code> , that was added to <code>www_server.conf</code> . Once the process is finished, email notification is provided if an email address is specified when the task is initiated.	/M	Fix	27381
39	493-503	Internal			
40	504	The source_locate X-Service response previously returned the base-name for a resource rather than the short-name when this information was included in the request.	/X	Fix	
41	505	Internal			
42	506	The monitoring tool contained a check (no. 6) to validate the default_z312 table. Because this table is no longer used, it has been removed.	Server side	Fix	
43	507	Internal			
44	508	Korean characters displayed incorrectly in alert notification – this is corrected.		Fix	
45	509-514	Internal			
46	515	The Create a Portal page did not refresh and did not indicate when the process was complete.	/M	Fix	
47	516	The problem with the global update option Switch to different configuration code was fixed.	/M	Fix	16384-13480
48	517	In previous releases, the <code>setenv email_sender</code> parameter in the <code>metalib_start</code> file was used only to specify the sender's mail address for records sent from the /V interface. Now this parameter also provides the sender's address for the KB report and the Activating Resources tool in the /M interface. The value of this parameter must be a valid e-mail address.		Fix	
49	540	Lateral links for duplicate records were sometimes incorrect. This was corrected.	/V	Fix	16384-54705
50	541-548	Internal			

3. Functional Enhancements Detailed Description

3.1. Wizard to Set-Up and Maintain QuickSets

Until now, it was necessary to define default profiles and then define QuickSets for these users in the /V interface. It is now possible to define QuickSets per default profile, using the new Manage QuickSets page in the /M. This page displays a list of existing QuickSets and also provides the option to define new QuickSets and to locate and assign resources to it. The Manage option, which is represented by the <M> action icon, is based on the /V interface. Note that the new Manage QuickSets option in the /M is in addition to the existing /V QuickSets creation and management functionality.

For more details, refer to the *MetaLib QuickSet and Category Administration Guide*.

3.2. Wizard to Initially Activate CKB Resources

A new workflow for activating and/or updating resources has been added. The workflow is based on exporting resources' IRDs to an Excel sheet, updating the data in the Excel file, and then re-importing the updated Excel file. The option includes the ability to select the specific fields to export from a list of available fields. The import performs a match based on the Resource ID, and overrides the specific fields included in the Excel file. The import and export work on a single institution at a time.

The following two workflows are supported:

- Export from the CKB by the Ex Libris implementation staff and import into customer LKB – Activate resources and update relevant fields.

In this workflow the Ex Libris implementation staff exports the entire CKB to an Excel file and sends it to the customer. The customer updates the data – indicating which resources should be active and adding local information. Once the customer has their own MetaLib installation, they can import the changed Excel file to their LKB.

In this workflow the matching key is the CKB ID and not the LKB ID. The system knows that if the LKB ID is blank it should use the CKB ID.

- Export from LKB and import into the same LKB – Activate and/or update resources.

In this workflow the customer already has a MetaLib installation; both the export and import are done from the customer's LKB. The matching key in this case is the LKB ID.

Although the primary goal of this functionality is to provide an option for quickly activating resources in a new institution, it can also be used as a way to quickly update multiple resources – it may be simpler to do this via Excel file then by using the cataloging interface, particularly if the field(s) to be updated are not included in MetaLib's global update functionality.

Note: The export will always include the entire LKB (or CKB when initially exported from MetaLib) of the specified institution. It is possible to delete resources that do not need to be changed in the Excel – the system will update only the resources and the specific fields that are included in the Excel.

For more details, refer to the *MetaLib Resource Management Guide*.

3.3. Deep Link Generator

Until now, deep links to MetaLib had to be created manually and the creator needed to be familiar with the MetaLib deep link syntax. This Minor Release includes a new, user friendly wizard which will help staff create deep links in an easy and simple method. The options presented in the deep-link generator are dynamic according to the function chosen.

Some deep link parameters are used for all deep links, while other deep link parameters are relevant only for specific MetaLib functions.

Permanent parameters – used for all deep links:

- Force login
- Portal and Language
- MetaLib Base URL (Host Name and Port)
- Proxy – type and URL

Parameters that depend on the specific MetaLib function selected:

Main Function	Parameters
Home page	
QuickSearch	Simple or advanced mode. Pre-selecting a Default Profile and QuickSet to search.

Find Database	Title, Locate or Category tabs and default. Categories available.
MetaSearch	Simple or advanced mode. Choose a Default Profile, QuickSet, category or locate with a default option. If QuickSet is chosen, an option to choose one QuickSet will appear. If category is chosen, an option to choose one category and sub-category will appear.

After a specific MetaLib function is selected and the relevant parameters are entered, a URL is generated that deep links to the specified MetaLib function. It is also possible to test the URL from the Deep Linking Generator interface.

Notes: To effectively test a deep link URL the link should be opened in a new browser window. Testing a deep link URL in a new tab of the existing browser window may use cached information that is no longer valid.

For more details, refer to the *MetaLib User Interface Guide*

3.4. Multiple Resource Types

It is now possible to define up to 3 resource types per resource. Additional fields have been added to the IRD cataloging interface. The additional types will be indexed and displayed in /V.

For more details, refer to the *MetaLib Resource Management Guide*

3.5. /M Roles (Staff Users), Menus and Separate Default Profiles

Staff users were previously defined in `tab_management`. This key table was moved to Oracle and /M in this Minor Release. The `tab_management` table is no longer used.

The main menu (Initial and Ongoing) has a new option called Staff Administration. The UI for this option is very similar to the User Administration option.

3.5.1. Staff Roles

As part of the new development, the following new roles have been introduced:

- **MetaLib Administrator (`m1admin` and `exsupport` are out-of-the-box users)**
 - The `exsupport` user is provided for use only by Ex Libris support and implementation staff.

- This new role has the same privileges as a previously-used "S" user, but it is automatically allowed privileges for all groups/Institutions.
- Can create users of any role for any group/institution.
- Can use all modules of /M.
- Can use MetaIndex (if licensed).
- The `mladmin` user can be re-created with UTIL T-4 if it is mistakenly deleted or the password is changed and forgotten.
- The `mladmin` password must be specified at the beginning of the 4.3 SP installation when prompted. This user and password is also used for the PDS Admin wizard.
- **Super User**
 - Can create users of the following roles for their group or institutions in their group: General Administrator, View Only, Reports and Statistics, and X-Server.
 - This role has the same privileges as the previously-used "S" user, but is limited to its group/institution.
 - Can use all modules of /M.
 - Can use MetaIndex (if licensed).
- **General Admin and General Admin Consortia**
 - Cannot create users.
 - This role has the same privileges as the previously-used "Y" user.
 - Can use all modules of /M except "Institutional Settings" and "Staff Users," where they can only view and update their own password.
 - Can use MetaIndex (if licensed).
 - Can use the Portal Look and Feel wizard.
 - General Admin Consortia user cannot initiate CKB Update or access CKB Update cron job interface.
- **View Only**
 - Cannot create users.

Can invoke only the following options from the /M main menu or second tool bar:

- Find a resource – use only the view <V> option.
- Browse list of resources – use only the view <V> option.
- View resources added and updated by CKB update – use only the view <V> option.

- Update their own login name and password in the Staff Administration module, but cannot change their own display name.
- Reports and Statistics module; can run all reports.
- Create links using the Deep Linking Generator.

The user cannot invoke any other options from either the /M main menu or the top most tool bar except for the **End Session** option.

- **Reports and Statistics**

- Cannot create users.
- Can invoke only the Reports and Statistics module and run all reports.
- Update their own login name and password in the Staff Administration module, but cannot change their own display name or view the list of other staff users.

The user cannot invoke any other options from either the /M main menu or the top most tool bar except for the **End Session** option.

- **X-Server User (pds is an out-of-the-box user)**

- These are users created for use with the X-Server, but they cannot enter the /M.
- The pds user is used for authorization of local users via PDS.
- Only the mladmin user may change this user's password.

Note: If you change password for the pds user on the MetaLib Management interface (/M), you must update the password in the PDS configuration files.

For more details, refer to the *MetaLib System Configuration and Administration Guide*

3.5.2. Initial versus Ongoing Menus

The MetaLib management interface (/M) now provides two main menus:

- Initial – intended for the initial implementation process.
- Ongoing – intended for ongoing management of MetaLib.

It is possible to toggle between the two menus by using the toggle button.

A default option for all staff users can be set or changed by a staff user with the relevant role. In new installations the default is the Initial menu. In all MetaLib 4.3 upgrades the default is the Ongoing menu.

Some menu options will be grayed out according to the role of the staff user who accesses the /M.

For more details, refer to the *MetaLib System Configuration and Administration Guide*

3.5.3. Separate Default Profiles

MetaLib has long had the concept of “default users” to provide default settings such as default QuickSets. These default users were effectively “dummy users” (Z312) that were created and maintained together with other local users.

In MetaLib 4.3, the concept of “default users” has been replaced by “default profiles.” Default profiles serve the same function but are created and maintained separately from other local users.

A new option has been added to the /M menus – Define Default Profiles. Options that are relevant to a default profile but were previously edited in the /V have been added – for example, the number of results to display in a page.

For more details, refer to the *MetaLib System Configuration and Administration Guide*

3.6. URL in IRD Description

In MetaLib 4.3 it is now possible to add URLs within specific descriptive IRD fields and to define a URL as part of a descriptive IRD field.

This enhancement applies to the following IRD tabs and fields:

Tab	Fields
IRD – Presentation: Primary	Description
IRD – Presentation: Secondary	Alternative Name, Coverage, Time Span, Full text note, Notes, Publisher, Alternative publisher names, Publisher description, Creator, and Copyright
IRD – Presentation: Library	Library address, city, state/province, Postal code, country, Telephone, fax, Transportation, Access for disabled, Access policy, Charging (Loaning) policy, Contact, and Note
IRD – Local	Local fields 1-5

Implementing this new feature can be accomplished in the following ways:

1. URL within a description.

The first way is to simply display the URL within the text. This can be accomplished by adding "@@U" before the URL, "@@D" before the description of the link, and "@@E" to indicate the end of the string. (for example, "PubMed was developed by the National Library of Medicine (NLM) (www.nlm.nih.gov). It was developed..." will be displayed, where in the IRD it will be typed as "PubMed was developed by the National Library of Medicine (NLM) (@@Uhttp://www.nlm.nih.gov@@D@@E). It was developed...")

2. Linkable descriptive text.

The second way to use the new syntax is to display linkable descriptive text (e.g. make the *publisher name* field, which is a text field, a link to the publisher's URL. For example, a link to PubMed would display in the UI as "[United States National Library of Medicine \(NLM\)](#)"; and the syntax would be "@@U http://www.nlm.nih.gov@@DUnited States National Library of Medicine (NLM)@@E").

Another example - to display a URL within the *description* field:

In the /V it will be displayed as: "PubMed was developed by the [United States National Library of Medicine \(NLM\)](#). It was developed in..."

The corresponding syntax is: "PubMed was developed by the @@U http://www.nlm.nih.gov@@DUnited States National Library of Medicine (NLM)@@E. It was developed in..."

Syntax of the feature:

- Use @@U before the link to recognize the subsequent URL entry.
- Use @@D before the description to be displayed.
- Use @@E after the URL to inform the system that the linked string is finished.

For more details refer to the *MetaLib Resource Management Guide*.

3.7. The Look and Feel Customization Wizard

The Portal Look and Feel wizard enables the user to customize the user interface without accessing the MetaLib server or having any familiarity with CSS or HTML.

The wizard allows the user to control the following aspects per institution, portal and language:

- Banner and Color Scheme
- Display or hide UI modules:
 - QuickSearch (simple and advanced)
 - Find Database
 - Find e-Journal
 - MetaSearch (simple and advanced)
 - My Space
 - Link to home page

- Changing order of modules
- Display or hide action Icons:
 - Display Actions as Icon/Text
 - Change language
 - Change portal
 - Login
 - Logout/End Session
 - Help

If changes to the CSS were made manually before trying to make a change using the wizard, a warning displays because the change could overwrite previous manual changes.

Note: The parameter `setenv default_search_under metalib_conf` defines whether the simple or advanced mode will appear by default, as a system-wide parameter that applies to all modules. If you try to hide the search mode selected as the default, the system will notify you that this is not possible and will refer you to the administrator if you would like to change this parameter.

For more details refer to the *MetaLib User Interface Guide*.

3.8. Default Profile for Portal and Default_z312 Table

In previous MetaLib versions, `default_z312` was one of the key setup tables. It served two functions:

- Definition of default profiles per IP range.

This function has been moved to an Oracle table (`IP_RANGES`), accessible via the Institutional Settings module in /M. There is a new option, IP Addresses, now included in this module. In the IPs tab it is possible to define profiles per IP range. It is also possible to indicate if there is need for a proxy server; functionality that was previously located in the `proxy.<institution>.config` files, which are no longer used by MetaLib.

Note: In the conversion process from `default_z312` and `proxy.<institution>.config` to the new Oracle table, some entries may be consolidated, while others may be divided into multiple entries. This is a result of comparing the existing `default_z312` and proxy definitions and consolidating this information in the new Oracle table.

Example of the old `default_z312` table:

```
010001234060 010001234068 HUJI-ENG-IN      HUJI
000000000000 999999999999 HUJI-ENG-GUEST HUJI
```

The last entry indicates the catch-all line, which applies to all institutions. With MetaLib 4.3, this functionality is defined by setting the following parameters in the `$metalib_conf/www_server.conf` file:

- `setenv EXT_USER_DEFAULT_PROFILE <default profile>`
- `setenv EXT_USER_INSTITUTE <institution>`

Example of an old `proxy.HUJI.config` table:

```
010001234065
```

Example of the new IP RANGES page on the MetaLib Management interface (/M):

```
From 010001234060 To 010001234064 HUJI-ENG-IN Use proxy server
From 010001234065 To 010001234065 HUJI-ENG-IN No need for proxy
From 010001234066 To 010001234068 HUJI-ENG-IN Use proxy server
```

- Definition of default profile for the change portal functionality – that is, the definition of the default profile to be used when entering a portal.

This function, which defines the default profile for the change portal functionality, has moved to the /M interface together with the decision whether a portal should be included in the **Change Portal** option presented in the /V (now shown as **allow changing to** option in the /M).

Notes:

1. As in previous releases, the catch-all line indicates to the system the last line of IP ranges.
 2. If you use the `default_z312` table for purposes other than the three mentioned out-of-the-box uses (that is, catch-all line, define IPs, and change portal functionality), contact the MetaLib Support team for further instructions.
-

For more details refer, to the *MetaLib System Configuration and Administration Guide*.

3.9. ELUNA X-Server SIG requests

3.9.1. Include Input Parameters in X-Service Output

A new parameter, `setenv x_server_display_input`, has been added to the `www_server_conf` file. This parameter determines whether to present the requested input parameters as part of the output returned by the X-Server. This is a general parameter that applies to all X-Services.

In addition, for any URL or XML specific request in any institution, the customer can also define separately whether or not to display the requested input parameters in the output returned by using the new `display_input` parameter. If the value of this parameter is `N`, or if the parameter is not included, the value specified in the general parameter determines whether or not the output will include the requested input parameters.

3.9.2. The `present_single` program and the `present` X-Service

When using the `present` X-Service with the `view=full` option, it is now possible to retrieve full records for resources that use the `present_single` program as part of their `EXTERNAL` configurations.

3.9.3. Password for `bor_info` X-Service

It is no longer required to include a value for the `verification` parameter for the `bor_info` X-Service; this parameter is now optional rather than mandatory.

4. Optional Implementation

4.1. Introduction to Optional Implementation

This section contains the procedures needed to implement three of the optional enhancements in this Minor Version release.

The Service Pack mechanism is capable of implementing the changes to relevant files automatically, but customers may prefer to implement them manually for the following cases:

- If you want to implement the optional changes at a later time. After running the optional implementation script, you will not be able to return and use the automatic mechanism any longer except to execute the manual implementation.
- In case you have previously made manual changes to the HTML files that are about to be changed for any of the three enhancements, you will be notified how and where to manually change these files in order to implement these enhancements.

When the Service Pack installation completes, the following message displays:

```
The Service Pack was installed successfully.
As part of MetaLib 4.3 Minor-Release, optional implementation actions
can be run.
Do you want to run them now? [Y]/N (You can later access them through
the sp.utility menu)

=====
* Explanation: In order to update the save-file menus with the*
* new save to EndNoteWeb functionality,                        *
* save as RIS Format functionality and                          *
* add the new v-peer.png, v-icon-peer.png                       *
* icons to all existing instances,                              *
* you must run the following scripts. Note that the new       *
* save-file values(RIS/EndNoteWeb) will be                     *
* added only if the HTML pages                                  *
* eshelf-2-save/full-save/full-save-simplified                *
* has not been modified or customized.                         *
=====
Continue running the script? [Y]:
```

If you choose to continue running the script automatically, the following prompts will display:

```
=====
* Step 1: Add the "save to EndNoteWeb" functionality          *
=====
Run this step? [Y]:Y
```

```

=====
* Step 2: Add the "save as RIS Format" functionality *
=====
Run this step? [Y]:Y

=====
* Step 3: Add the new "peer-reviewed icon" to all instances *
=====
Run this step? [Y]:Y

Optional implementation Done.

Click to continue

The Service Pack utility is (For example)
/exlibris/metalib/m4_3/service_pack/403-548/sp.utility .
Do you want to run it now? [Y]/N

```

4.2. Save to EndNote Web

If you have manually changed the `full-save`, `eshelf-2-save`, or `full-save-simplified` files under the `www_v_eng` directory, you will receive a warning if you attempt to implement the EndNote Web enhancement automatically.

To view these instructions on the server, see the following file, where `<x>` is the MetaLib copy:

```

/exlibris/metalib/m4_<x>/service_pack/404-548/files_to_change_manually.sp.
548.step_1

```

To implement this change manually for each file that has been modified:

1. Enter the following command to edit the file:

```
>> vi (For example)/exlibris/metalib/m4_3/ins01/www_v_eng/full-save
```

2. Add the following line:

```
<option value=779> //EndNoteWeb\\</option>
```

after:

```
<option value=778> //Refworks\\</option>
```

or anywhere else inside the following element:

```
<select id=format name=format class=field>*****</select>
```

3. Exit and save your changes to the file.
4. Repeat this procedure for the remaining files.

4.3. RIS FORMAT

If you have manually changed the `full-save`, `eshelf-2-save`, or `full-save-simplified` files under the `www_v_eng` directory, you will receive a warning message if you try to implement the RIS Format enhancement automatically.

To view these instructions on the server, see the following file, where `<x>` is the MetaLib copy:

```
/exlibris/metalib/m4_<x>/service_pack/404-548/files_to_change_manually.sp.548.step_1
```

To implement this change manually for each file that has been modified:

1. Enter the following command to edit each file, where `<file_name>` represents the files `full-save`, `eshelf-2-save`, and `full-save-simplified`:

```
vi /exlibris/metalib/m4_3/ins01/www_v_eng/<file_name>
```

2. Add the following line:

```
<option value=776> //RIS Format\\</option>
```

after:

```
<option value=999 selected> //Standard\\</option>
```

or anywhere else inside the following element:

```
<select id=format name=format class=field>*****</select>
```

3. Exit and save your changes to the file.
4. Repeat this procedure for the remaining files.

4.4. Peer Review Indicator

If you have manually changed the `find-db-6-body`, `eshelf-2-body`, `meta-3-body`, or `quick-3-body` files under the `www_v_eng` directory, you will receive a warning message if you try to implement the changes manually.

To view these instructions on the server, see the following file, where `<x>` is the MetaLib copy:

```
/exlibris/metalib/m4_<x>/service_pack/404-548/files_to_change_manually.sp.548.step_1
```

To implement this change manually for each file that has been modified:

1. Enter the following command to edit each file, as indicated by `<file_name>`:

```
vi /exlibris/metalib/m4_3/ins01/www_v_eng/<file_name>
```

2. Replace the following lines:

```
<START_SECTION><!-- head-button-7 -->
***** HTML-CODE *****
<END_SECTION><!-- head-button-7 -->
```

with:

```
<START_SECTION><!-- head-button-7 -->
      <li class="sfx"><a href="%&server_vir?func=full-
service-
sfx&doc_number=$0100&line_number=0000&service_type=
REC&P04=0000&sfx_service_type=getFullTxt" onclick=
'javascript:open_window_sfx("%&server_vir?func=full-service-
sfx&doc_number=$0100&line_number=0000&service_type=
REC&P04=0000&sfx_service_type=getFullTxt");return
false;' class="fulltext" > </a></li>
<END_SECTION><!-- head-button-7 -->
```

3. Replace the following lines:

```
<START_SECTION><!-- tail-brief-1-pr -->
***** HTML-CODE *****
<END_SECTION><!-- tail-brief-1-pr -->
```

with:

```
<START_SECTION><!-- tail-brief-1-pr -->
      <a href="%&server_vir?func=full-service-
sfx&doc_number=$0700&line_number=0000&service_type=
REC&P04=0000&sfx_service_type=getFullTxt"
target="_blank" onclick='javascript:open_window_sfx
("%&server_vir?func=full-service-
sfx&doc_number=$0700&line_number=0000&
service_type=REC&P04=0000&sfx_service_type=
getFullTxt");return false;' title="//Peer Reviewed Full Text\\"
//for\\ //Document number\\ $0800">
</a>
<END_SECTION><!-- tail-brief-1-pr -->
```

4. Replace the following lines:

```
<START_SECTION><!-- body-table-3-pr -->
***** HTML-CODE *****
<END_SECTION><!-- body-table-3-pr -->
```

with:

```
<START_SECTION><!-- body-table-3-pr -->
      <a href="%&server_vir?func=full-service-sfx&
doc_number=$0700&line_number=0000&service_type=
REC&P04=0000&sfx_service_type=getFullTxt"
target="_blank" onclick='javascript:open_window_sfx
("%&server_vir?func=full-service-sfx&doc_number=$0700&
&line_number=0000&service_type=REC&P04=0000&
sfx_service_type=getFullTxt");return false;' title="//Peer
```

```
Reviewed Full Text\\ //for\\ //Document number\\ $0800"></a>  
<END SECTION><!-- body-table-3-pr -->
```

5. Exit and save your changes to the file.
6. Repeat this procedure for the remaining files.