Sunday June 4, 2006

ELUNA Conference Registration

Monday June 5, 2006

8:00 – 10:00
Welcome session

10:00 - Noon
A. Using SFX API (application programming interface) to Access E-journals Within the Catalog (EZ Proxy)
B. Using the SFX API within the CDL Common Framework
C. Facilitating Expedited Document Delivery Using the SFX API

1:00 – 3:00
ELUNA Course Reserves Group (Aleph Breakout Session)

3 – 5:30
Plenary Session

Tuesday June 6

8:00 – 10:00
SFX Product Feature

10:00- Noon
MetaLib Product Feature

1:00 – 3:00
Reserves without Reservations II: Implementation and Evaluation

Utilizing SFX Journal Search in a Tabbed OPAC environment (end of presentation and handout)

3:00 -5:30
A. Utilizing SFX's Export Tool to maintain electronic resources collection
B. Using SFX in Course Reserve

Wednesday June 7
8:00 – 10:00
ELUNA Business Meeting

10:00 – Noon
SFX/MetaLib Product Group Meeting

Ongoing Poster Sessions
1. Batch Updates
2. Wake-up Recall
3. Web OPAC Usage Analysis
4. New Titles List (handout requested)

ExLibris Technical Seminar
Wednesday June 7

1:00 – 3:00
Integration MetaLib with External Applications – Deep Linking and the MetaLib X-Server

3:00 – 5:30
SFX & Verde Consortia Configuration

Thursday June 8

8:00 – 1000
SFX/Verde/ALEPH Integration

10:00 – Noon
Aleph – XML and XSL use to print Letters and Reports

Lunch presentations:
DigiTool, Verde, Primo

2:00 – 4:00
SFX A-Z List and Citation Linker and Object Table

4:00 – 5:30
PDS and Authentication across Products

Using SFX (application programming interface) to Access E-journals Within the Catalog (EZ Proxy)

SFX API – e-journals within the catalog (download .zip file)

SQL server; maintaining syntax and 856 were a problem. SFX = e-journal catalog; MetaLib = database catalog

OpenURL on data in (lib)? Dynamic button only displays when all the conditions are met. Java script and Perl.

Placement; serials (limited to genre) SFX reports FT (from the aggregator)

Conditional on genre = *s.journal (serials); Load page first then SFX executes; JavaScript checks OpenURL genre = journal; Config file

DHTML marquee, search for FT query, SFX Perl queries remote SFX server, OpenURL; request XML, response SFX – correct ISSN (e-journal – SFX looks at print ISSN first then eISSN); Rewrite OpenURL SID, removes the date restriction

Using the SFX API within the CDL Common Framework (California Digital Library)

Citation List PubMed → order; PubMed order → multiple doc. del. to UC citation.
"Calling" from PubMed – PMID ~ FT services
Context Object; link to Melvyl catalog = citation list
Without FT citations can go to ILL request; with FT source target is displayed. Complete metadata (target URL) XML

Common framework separates front end, back end, data storage. Integration of 3rd party services (SFX). OpenURL manager; Calling program, no direct key; ctx_obj_target

MetaLib API: Earth sciences portal, SFX A-Z list
- problem with landing on journal homepages and not on the article
- problem with "drilling down" on free sites

OpenURL SAP (San Antonio Protocol) – multiple items in a single request

Facilitating Expedited Document Delivery Using the SFX API

Expedited Doc. Del with SFX API
Catalog plug-in query – data source for e-collections
- persistent URL
- A – Z
- Catalog records MARCit!
- Access express doc. Del. to desktop del. within 24 hours

Created a target with some titles
- ILLiad special queue for order
- Index → SFX → Springer (selected titles) ILLiad → doc_del.cgi → ILLiad
- ND paying for the articles in journals no longer subscribed to
- PID

Service into Catalog and A-Z list
- 2nd target with no threshold
- Visible only e-journal and CAT
- Require year
- Validate title, metadata, use SFX API behind the scenes

EJL/CAT – SFX – Springer Express (no threshold) → date – doc_del.cgi 1) to and from SFX, 2) to full text, 3) to ILL

Context sensitive

- form variables plus the metadata
- services that are important to the uses

Framework for access to other publishers or journals not subscribed to

ELUNA Course Reserves Group (Aleph Breakout Session)

Routine functionality, minor changes. Version 19 course management integrated with the GUI. Proxy courses. Multiple courses with the same item.

- Push a record from list of course documents to [appropriate] client
- Circulation info from the CR web interface
- Error corrections on bib or item not in web cat. Changes to records, suppress records in cataloging
- Incomplete form (material type, copy number)
- Duplication xxx30 bib records, additional courses

Electronic reserves – class enrollment data; Display dates – short term CR; Call number index by CNO (possible now? Ask Jane Aikens about a new index)

Searching by title or author confusing and misleading. Which bib record to change.

From the web, unknown if the item is used by multiple courses or by multiple professors. Pull report (course_04) past end date – but what if used by another ongoing course?

CNO field links – multiple courses, Course col. Only displays the first CNO, the full record displays the other CNOs.

Proxy course – parent / child. Control over the display. Parent course doesn't indicate the presence of a child course. Cannot add to a proxy. If either parent course or child course is "not active" none of the multiple course sections will display as active.

Personal copies in CR30 not included. System ID = Course ID which cannot be changed and cannot be duplicated (i.e. spring and fall).

- Improve search
- Suppress not delete
- Select multiple documents for deletion
- Item options

Pick up list – recall on items "cumbersome". CR logon Web get set can email to self and other. Save file on the server and load file into CR30.

SFX Product Feature

SFX, the OpenURL-compliant link server, provides users with context-sensitive linking to services that their institution has defined and customized on the basis of its e-collections and policies. Version 3 ongoing enhancements: bi-monthly software updates, semi monthly KB – by fall, workflow.

SFX API (OpenURL 1.0 SAP2 XML) multiple context items bundle citations, multi-journal result, type of response, override the threshold in a catalog search.

SFX supports link to conference proceedings (ask Mark Demlow for details)
DB changes to support better KB data and further tools (July 2006 update)
SFX KB requests to CRM track changes

Verde – integration with ERM (Verde), data transfer seamless. ONIX SOH 1.0 subscription maintenance (serial online holdings) import tools for shared resources.

Improve A-Z list and look at A-Z settings again. Default select starts with "browse" (open list) or "search" (closed list of only titles that match)

Conference proceedings (July 2006): for instance IEEE has ISSN or ISBN so there is a problem with linking (ND local database includes both targets) TWO Targets.

- Object table – relationship field
- Object type = Series (book, journal, proceedings)

Logic: if Proceedings then no series is returned

July 2006

- Increase Target, Internal name to 80 characters
- Title Table
    - Original (CJK) character based
    - Uniform Title (CONSER -240) -- what if 130 or other unexpected field??
    - Alternate (CONSER 246) both 240 and 246 in Roman text
- Target Service, Object port (description field), Add linking field – which level of linking is provided:
    - article level
    - article level through CrossRef / DOI
    - issue level
    - vol. level
    - journal level
    - database level
        - local targets support (local database)
        - Access to CRM by non SFX admin.
        - Vol. and parts – adapt parser to volume and ignore part
        - ISBN 13 accommodated
        - Percentage statistical enhancement
        - A – Z is journal only, perhaps an A – Z e-book list
- Relationship related 785 – previous title, continued by.
    - NYT and NYT Magazine – parent – child, decoupled, merged, split

Publisher Table – date of publication
Relationship Types

- Proceedings – series
- Proceedings – items
- Continued by

Object Table

- language
- peer reviews (Y or N)

New Object Type (Non- ISSN data)

- newspaper, transcript, DB, wire, CD, manuscript

E-book access
Non-UID 9844 data (Lexis Nexis, newspapers, and later EBSCO and Gale)

Linking Issue

Access to e-books for the future.

End user to e-books data via OpenURL from abstract database or library catalog (ISBN) SFX to the title level (ISSN / eISSN). ISBN and eISBN relationship for e-books.

McGill Muse currently uses the SFX target **856_URL** to access e-book data in SFX. The SFX button appears in the brief view in the catalog. The SFX record ID fetches the full MARC record and URL for the direct link for the e-book

September 2006 SFX change request – push to CRM rather than email queue. Easier on support staff to check new CRM.

Version 4 (2007)

- Admin. interface: task based wizards – interactive following workflow
- Integration of Verde and sharing of KB data
- Integration of print holdings – improved loading of data and plug-in to check holdings data
- Improve end user menu linking – direct link, drill down to navigate results
- Improve management statistics (by ISSN and ISBN numbers)
- KB update upon demand

Set up wizard – added intelligence
Plug-ins – red light and green light

Scholar SFX – for small institutions, for free without a SFX server with Google Scholar, FT only

MetaLib Product Features

Verde – electronic resource management system
MetaLib – library portal to e-resources
SFX – citation link resolver

The physical collection is in ALEPH and the e-resources in SFX, MetaLib, and Verde. The digital collection is managed in DigiTool.

E-resources SFX, MetaLib and Verde are back-ends for the resource discovery by users
-- Library – learning LMS and CMS
-- Portals
-- Out of the Library – Google, e-research

Working with libraries – partnerships, standards
Working with key industry players (Google Scholar, MSN, OpenURL integration)
OCLC – perceptions of libraries and resources (Jan. 2006 article?)
Global trends

- information discovery like Google
- User expectations, overall internet experiences
- Web 2.0; SOA (services oriented architecture), architecture trends.
- Google, easy interface, relevant results first, fast results (Primo)
- Bolger – self-publishing
- Wikipedia – collaborative tool
- FlickR – tagging keywords, metadata

Role of the library

- competition with well defined domain “The Library”
- strive to be the vital source of resources and services in its community
- focus on bringing content services to the user
- how to remain relevant to users

Requirements of the user: expose content and services to the user **when** and **where** they need and in **a way they expect it**

- range of services, portals, Google, special applications

- interoperability: X Server and Web server
- publish into Google
- one stop shop
- simple but powerful
- access quality

Discovery is a means; Access and Delivery is the goal

- Instant gratification (e-resource)
- Scope, how things get included
- Directing the search, difficult
- Collaborative tools (tagging)

Back end systems, such as SFX, MetaLib, Verde, and DigiTool, are library governed and can be tied to the OPAC (i.e. Aleph) rather than to the end user. De-couple the experience. Data creation and discovery = delivery.

Primo can be used to “harvest” the data into a new “publishing” platform: the Front End User Service layer
The back-end: Library collections, remote collections, digital collections, e-resources.

Primo: search style, syntax of search engine, searching a range of formats (owned books, images, audio files, journals, etc.) – multiple sources. Gain access (using the back end services – homepage of a journal, whatever the best option to access information

FRBR (functional requirements for bibliographic description) model grouping, relevance, other sort options, enrich the results (TOC, book cover, etc.), reviews, tagging (FlickR), and search on tags.

Faceted browsing, harvesting information, refinement without guessing, pre-calculated refinement from the search (drill down option). expand the search, correct the search.

Search Local or Search Remote—predefined quick sets on remote sources.
Discovery space of the users – presentation, application, discovery engine (Lucerne Open Source), publishing platform – controlled vocabulary, faceted

Operate efficiently, increase value of services, finding new domains for extending services
J2EE component – petabytes of data, power users

(FlickR allows photo submitters to categorize their images by use of keyword "tags" (a form of metadata), which allow searchers to easily find images concerning a certain topic such as place name or subject matter. FlickR provides rapid access to images tagged with the most popular keywords. Because of its support for user-generated tags, FlickR repeatedly has been cited as a prime example of effective use of folksonomy. Also, FlickR was one of the first websites to implement tag clouds.

FlickR also allows users to categorize their photos into "sets", or groups of photos that fall under the same heading. However, sets are more flexible than the traditional folder-based method of organizing files, as one photo can belong to many sets, or one set, or none at all (the concept is directly analogous to the more well-known "labels" in Google's Gmail). Flickr's "sets", then, represent a form of categorical metadata rather than a physical hierarchy.

Metadata (Greek *meta* "over" and Latin *data* "information", literally "data about data"), are data that describe other data. Generally, a set of metadata describe a single set of data, called a resource.

An everyday equivalent of simple metadata is a library catalog card that contains data about a book, e. g. the author, the title of the book and its publisher. These simplify and enrich searching for particular book or locating it within the library.

Metadata are of special interest in various fields of computer science, e. g. information retrieval and the semantic web. Although many consider them a powerful tool to bridge the semantic gap, they are criticized severely by others.

FRBR = Functional Requirements for Bibliographic Description is a conceptual entity-relationship model developed by the International Federation of Library Associations and Institutions (IFLA) that relates user tasks of retrieval and access in online library catalogues and bibliographic databases from a user's perspective. It represents a more holistic approach to retrieval and access as the relationships between the entities provide links to navigate through the hierarchy of relationships. The model is significant because it is separate from specific cataloguing standards such as AACR2 or International Standard Bibliographic Description (ISBD).)

Reserves without Reservations II: Implementation and Evaluation *(need handout)*

SUNY Health Services Library e-Reserves – Access – Digitization – Cataloging – User Statistics
E-reserve available 24 x 7, many off campus users. The library is the point of access **instead of Blackboard** – avoids searching in two locations AND overlapping workflow. Familiar (ALEPH) interface, Authentication via Proxy Server for CR and use statistics, **single** course reserve collection, search single interface.

Library receives and processes materials following cataloging guidelines. Document, copyright, course information, scan, save, and brief catalog record.

Display, PDF filename input box = creates hyperlink to PDF document.
Item record – print – e-document selection

Web CR → course record Brief bib → PDF file name Select → Link Text URL
www_r_eng/doc_new_record, add item xxx30 Java Script, text box additions

Item Status = online
Call number = electronic reserve
Collection = e-reserves
Print call # = other
Tab 15 – circ status = online
Tab 40 – e-reserve collection
856 web link → copyright policy (articles) → authentication page (EZ Proxy) → access
PDF URL = 187 characters Professor + Course + Title

Proxy server – guidelines for hardware, software, pop-up how-to

Educate → Copyright Clearance policies for faculty and students, partner with faculty

- Authentication down to the course level
- Download time for PDF (individuals hardware and software)
- Request form "contract" – source information (citations like ILL)
- FT online from database – statistics for database, check for ownership
- Item record ~ for call# ERESERVE (button) Go to Article
- Put the link from Blackboard in CR30

Utilizing SFX Journal Search in a Tabbed OPAC Environment (caught the end of the session, handout and some notes)

Print hold to SFX; improve assigned categories; update KB;

SFX fro database and SFX in the OPAC = same look
MetaLib journals

Citation Linker boxes not Aleph. Article citation = only if they have the actual citation (Journal title, vol., issue, page numbers – but not title or author. Limits)
One stop comprehensive pre-link lookup = go directly to the article, depending on journal access, without intermediary screen

OCLC World Cat – zip code
Plug-in (Google)
Firefox plug-in to search own catalog

Maintain print holdings in SFX (closed print records)
Would MARCit! be a better solution?

Using SFX in Course Reserve

SFX Citation Linker = intake form for CR requests
FT availability, routing requests for PDF, avoid unnecessary copyright concerns
New SFX target = would include course reserve requests from databases (eISSN) **and** books from the OPAC (eISBN)
Process: Web CT, search, scan, copyright concerns
My SQL database backend
Links, PDF, and multimedia

Citation Linker basis for copyright form – link to **licensed** FT content
Form → Citation Linker
Html i-frame, push menu
If licensed FT (yes) → will go on reserve
If FT not licensed (no) → copyright and fair use → request PDF, etc. of article

Staff backend
Citation Linker → SFX and durable (OpenURL) URL
If licensed FT content no copyright problem (ACRL fair use test standards)

Can SFX add articles to CR from index
Doc_del_local modified → .cgi form and .php CR form

Service added to Result Menu: Send to CR → requires authentication. User name lookup, active courses for…

Staff end → sending URL note "added SFX" eISBN / eISSN data in OpenURL
Z39.50 catalog lookup plug-in; create link back to the catalog to get CNO
Catalog → Tab link → External Web CT (i.e. Blackboard); List for students, access points on one screen, usual period of activity

Utilizing SFX's Export Tool to Maintain Electronic Resources Collection

SFX is limited to journals, wanted Google-like search on multiple parameters.
Added richer functionality, all electronic resources.

- type of resource for each record

- journals imported into catalog from SFX export , other resources

Maintenance
- XML file
- Parse XML extract information
- Upload e-resources

Export object portfolio criteria
- tag fields
- ISSN / eISSN, title, URL availability and target (publisher)
- Synchronization of SFX and e-resources
- Open Source
- Command line JAVA

Software architecture: model – view – controller
- Data module java
- Record java – mapping
- Find java – update .java insert.java

Business Logic
- ISSN is unique ID
- ISSN in export file compared with existing record (022 |a) update fields
- ISSN not found = new record
- List of newly inserted records

Deactivated in SFX
- compare ISSN, not found, source disabled (not deleted)
- command line
- list of inactive
- list of new

Users – one interface
- searches many fields
- library portal
- SFX KB
- Single repository for all e-resources
- General URLs for 856 OPAC single format
    - Can handle non-ISSN resources using URL
    - URL changes, advantage not having to update manually in the 856

Multiple items? Keyword search.
Many fields [Search] author or title

*** Ask for source code if possible

ELUNA Business Meeting

Election of officers, treasurers report, etc. 103 member institutions $20,000 from ELUNA to UT conference, $25,000 from EXL to UT conference. June 3 – 6 2007 ELUNA in Spearfish S.D. May have tech seminar first then ELUNA. For UT: 400 registered (35 EXL) System Seminar 150+

SFX / MetaLib Product Group meeting

Interface with IGeLU group for enhancements. Enhancement process will be more of a list of requested changes for EXL to work on. They will not be tied to a particular release.

1. Product Group Chair: Mark Demlow
2. Enhancement Chair: Rhonda Rowe, U of Texas (non-Aleph site)
3. Program 2007 Chair: (Maribeth for UT will assist 4 others in planning) – SFX and MetaLib (Verde, DigiTool, and Primo will have own product groups
4. Steering committee

Enhancement process – time line, September Igelu meeting in Sweden, the process workflow (not like Aleph enhancement process), top priorities

Carmet EXL enhancement coordinator

- “wiki” to capture ideas, skim off the top ones, one vote per institutional membership
- IT enhancements too?
- Non-aleph users
- Large and small library reps

SMUG communication with international listserv

IGeLU website SFX MetaLib products

- partnership issues
- shared docs
- best practices
- archives of previous meetings
- one customer from each product