



# Source Configuration Guide

Version 4

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## Updates to This Guide

This guide is being reissued due to the following change:

- The **Check SFX baseURL validity during registration** option has been added to the Google Scholar registration form. For more information, see **Filling Out the Google Scholar Registration Form** on page 47.





# 1

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## Introducing SFX Source Configuration

This guide describes the status of different SFX sources and the procedure required to activate SFX source databases during SFX implementation.

To be able to test and configure the SFX system properly, SFX-enabled sources (databases from which you start the SFX linking in which SFX buttons appear) need to be activated. These sources need only be accessible from a few PCs in the library. Typically, these will be the PCs of the SFX team members or library staff evaluating the SFX services during the configuration period.

---

### **IMPORTANT:**

To activate the SFX sources, you must notify database vendors to set the correct OpenURL's base URL. Database vendor contact information is included for all sources.

---

## Overview of Sources: Customizing the SFX Button

### Sources that Allow a Custom SFX Button

- ABC-CLIO
- AMS MathSciNet
- Annual Reviews
- ArXiv
- Biomed Central
- Blackwell Synergy
- ContentScan
- CSA
- Dialog@site
- EbscoHost

- Elsevier ScienceDirect
- Endeavor Voyager
- Ex Libris - Aleph
- Ex Libris - MetaLib
- Family Scholar Publications
- Gale
- HLAS
- H W Wilson (size restrictions)
- III : Innopac
- Ingenta
- IOP
- ISI: WOK
- JSTOR
- MedPilot
- NISC (BiblioLine)
- OCLC - Firstsearch
- Ovid
- Proquest
- NCBI Pubmed
- RLG
- SilverPlatter
- Ulrichsweb

### **Sources that Allow a Custom Hyperlinked Text**

- CAS ChemPort
- EI Village 2 - Compendex

### **Sources that Allow Only a Standard SFX Button**

- Swets

### **Sources that Allow Only a Source-Specific Hyperlinked Text**

- ISI Researchsoft - Endnote
- Zetoc

# 2

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## Sources

### ABC-CLIO

- Parser: ABC.pm
- Contact details:  
[webtech@abc-clio.com](mailto:webtech@abc-clio.com)
- Status:  
OpenURL-aware (Y/N)? Y
- The following metadata elements are included in the OpenURL:
  - sid
  - genre
  - ISSN
  - volume, issue, year, startpage
  - journaltitle
  - article title
- Currently, SFX buttons only appear for article records in ABC-CLIO. All citation elements (journal name, ISSN, year, volume, issue, first page) must be present (and parsable) for an SFX button to be displayed for a particular record. In the future, ABC CLIO will be adding SFX buttons for books.
- Location of the SFX button:  
The location of a (customized) SFX gif can be specified in the Admin module.
- Procedure:  
The enabling process is handled through the institution's Admin module. To configure your account to display the OpenURL links, you need to log on to the Admin module and enter the path to the OpenURL resolver. You can

also provide the path to an image file and alternate display text if desired (defaults will be used if these fields are left blank).

Access instructions are available from [webtech@abc-clio.com](mailto:webtech@abc-clio.com)

- Example of an OpenURL:

```
http://demo.exlibrisgroup.com:9003/demo?sid=ABC-  
CLIO:AHL&genre=article&issn=0003-  
1283&title=American%20Speech&date=2002&volume=77&issue=1&s  
page=3&atitle=%3C%3E%3ESHE%20SAY,%20SHE%20GO,%20SHE%20  
BE%20LIKE%3A%3C%2F%3E%20VERBS%20OF%20QUOTATION  
%20OVER%20TIME%20IN%20AFRICAN%20AMERICAN%20VER  
NACULAR%20ENGLISH.
```

## AMS MathSciNet

- Parser: DEFAULT
- Contact details:  
E-mail: [msn-support@ams.org](mailto:msn-support@ams.org)  
URL: <http://www.ams.org/mathscinet>
- Status:  
OpenURL-aware (Y/N)? Y  
From MathSciNet Version 8 and later.
- Location of the SFX button:  
The SFX button can be customized by the SFX customer. The button has a non-default SFX button size of 50 x 21 pixels.  
This non-default button can also be found on the SFX server at:  

```
/exlibris/sfx_ver/sfx4_1/<instance_name>/templates/img/  
sfxmenu/ sfx_mathsci.gif
```
- Procedure:  
If your institution currently has an SFX service, send an e-mail to:  
[msn-support@ams.org](mailto:msn-support@ams.org).

- Example of an OpenURL:

[http://demo.exlibrisgroup.com:9003/demo?sid=AMS:MathSciNet&atitle=Transition%20from%20Poissonian%20to%20Gaussian-orthogonal-ensemble%20level%20%20statistics%20in%20a%20modified%20Artin%27s%20billiard%20&aufirst=A&aulast=Csordas&coden=PLEEE8&date=1994&epage=332&genre=article&issn=1063-651X&issue=1&pages=325-332&spage=325&title=Phys%20%20Rev%20%20E%20\(3\)&volume=49](http://demo.exlibrisgroup.com:9003/demo?sid=AMS:MathSciNet&atitle=Transition%20from%20Poissonian%20to%20Gaussian-orthogonal-ensemble%20level%20%20statistics%20in%20a%20modified%20Artin%27s%20billiard%20&aufirst=A&aulast=Csordas&coden=PLEEE8&date=1994&epage=332&genre=article&issn=1063-651X&issue=1&pages=325-332&spage=325&title=Phys%20%20Rev%20%20E%20(3)&volume=49)

## Annual Reviews

- Parser: DEFAULT
- Contact details:  
Contact Annual Reviews customer support  
URL: <http://arjournals.annualreviews.org/>
- Status:  
OpenURL-aware (Y/N)? Y  
OpenURL elements:
  - sid
  - doi
- Example of an OpenURL:  
<http://demo.exlibrisgroup.com:9003/demo?sid=annualreviews&id=doi:10.1146/annurev.ne.19.030196.000245>
- Location of the SFX button:  
The location of a customized SFX button can be specified by the SFX customer. The button has a non-default SFX button size of 85 (width) x 20 (height) pixels.
- Procedure:  
Annual Reviews OpenURL linking can be set in the administrative account.

### To enable OpenURL linking:

- 1 Select **Institutional Administration** and select the **OpenURL** tab in the administrative interface.
- 2 Enter the SFX base URL. This is the name of the SFX server, the port number, and the SFX database name.

Example:

[http://servername:port/sfx\\_instance](http://servername:port/sfx_instance)

- 3 Upload a customized button gif (or use the default button labelled **OpenURL**).

## ArXiv

- Parser: DEFAULT
- Status:  
OpenURL-aware (Y/N)? Y
- Contact details:  
E-mail: [www-admin@arXiv.org](mailto:www-admin@arXiv.org)
- For setup details, refer to the ArXiv Web page (OpenURL linking services):  
<http://arxiv.org/help/openurl>
- Location of the SFX button:  
ArXiv uses the SFX gif present at the default location on the customer's SFX server:  
[http://servername:port/sfx\\_instance/sfx.gif](http://servername:port/sfx_instance/sfx.gif)
- Procedure:  
Use cookie-pusher to identify the base URL for the SFX server being used.  
The <http://arXiv.org/openurl-cookie> script sends you to a page called **ArXiv OpenURL cookie manipulator**.  
You can set the base URL cookie and redirect to the ArXiv main page by using the following URL:

[http://arxiv.org/openurl-cookie?baseURL=http://servername:port/sfx\\_instance&Redirect=http://arxiv.org/&newWindow=yes&.cgifields=newWindow](http://arxiv.org/openurl-cookie?baseURL=http://servername:port/sfx_instance&Redirect=http://arxiv.org/&newWindow=yes&.cgifields=newWindow)

## Biomed\_central

- Parser: DEFAULT
- Contact details:  
BioMed Central  
34-42, Cleveland Street  
London W1T 4LB  
E-mail: [institutions@biomedcentral.com](mailto:institutions@biomedcentral.com)
- Status:  
OpenURL-aware (Y/N)?  
BioMed Central/Biology Reports Faculty of 1000 is currently OpenURL-enabled. Other BioMed Central databases will become OpenURL-enabled in the future.
- Location of the SFX button:  
The vendor uses the SFX gif present at the default location on the customer's SFX server:  
[http://servername:port/sfx\\_instance/sfx.gif](http://servername:port/sfx_instance/sfx.gif)
- Procedure:  
Any institution that subscribes to Faculty of 1000 can have SFX links added (in addition to or instead of document delivery links) by e-mailing the details of their SFX server base URL to:  
[institutions@biomedcentral.com](mailto:institutions@biomedcentral.com)  
Also, institutions that take out a free trial to Faculty of 1000 may specify an SFX server which they would like to be used. Details should be e-mailed to:  
[institutions@biomedcentral.com](mailto:institutions@biomedcentral.com)

### To enable OpenURL linking:

- 1 Contact Biomed Central about the fact that you have an SFX server and will want to use the OpenURL-enabled version of Faculty of 1000.  
Our contact person at Biomed Central is Matthew Cockerill. If your technical support representative has questions, he/she should contact Matthew.
- 2 Ask for a test period during which the SFX buttons will be visible to a small number of people (for example, restricted by IP address or user name and password).

- 3 Send Biomed Central the base URL that they need to insert in the OpenURL:

[http://servername:port/sfx\\_instance](http://servername:port/sfx_instance)

This is the name of the SFX server, the port number, and the SFX database name.

## Blackwell - Synergy

- Parser: DEFAULT
- Contact details:  
Contact your support representative.
- Status:  
OpenURL-aware (Y/N)? Y  
OpenURL linking is available for each of the references at the end of the full text articles in Synergy.  
OpenURL Standard Parameters are:
  - sid
  - genre
  - atitle
  - volume
  - issue
  - spage
  - date
  - aulast
  - aufirst
  - DOI
- Location of the SFX button:  
Each customer can specify a customized button for linking in gif format.  
Example:

```
http://demo.exlibrisgroup.com:9003/  
demo?sid=blackwell:synergy&genre=article&aulast=Bikhchandani&  
aufirst=Sushil&date=1992&stitle=Journal+of+Political+Economy&vol  
ume=100&spage=992&id=doi:10.1086%2F261849
```



- Procedure:

#### To enable OpenURL linking:

- 1 As a local administrator, on the OpenURL Linking page of the Administrator screen:

Enter the base URL:

[http://servername:port/sfx\\_instance](http://servername:port/sfx_instance)

This is the name of the SFX server, the port number, and the SFX database name.

- 2 Upload a customized button gif.

---

#### NOTE:

The default SFX button can be found at [http://servername:port/sfx\\_instance/sfx.gif](http://servername:port/sfx_instance/sfx.gif)

---

It is also possible to use the Synergy default button labeled **OpenURL**.

## Chadwyck-Healey PCI

- Parser: DEFAULT
- Source name in KBManager: PCI
- Contact details:  
Contact your local sales representative.
- Status:  
OpenURL-aware (Y/N)? Y  
OpenURL Standard Parameters from PCI:
  - sid
  - issn
  - genre
  - jtitle
  - atitle

- Example:

```
http://demo.exlibrisgroup.com:9003/  
demo?sid=pqil:pci&genre=article&atitle=Mozart%27s+Biz  
arre+Verbal+Behavior%3a+A+Case+of+Tourette+Syndrome%3F&am  
p;title=Maledicta&issn=0363%2d3659
```

## Chemical Abstracts Service - Chemport

- Parser: CAS .pm
- Contact details:  
Contact your local sales representative.
- Status:  
OpenURL-aware (Y/N)? Y  
OpenURL Standard Parameters from CAS:
  - issn
  - volume
  - issue
  - coden
  - genre
  - spage
  - date
  - title
  - stitle
  - atitle
  - authfull

- Example:

<http://demo.exlibrisgroup.com:9003/demo?sid=STN:CAPLUS&issn=0013-936X&volume=31&issue=8&coden=ESTHAG&genre=article&date=1997&spage=2428&title=Environmental%20Science%20and%20Technology&stitle=Environ%2E%20Sci%2E%20Technol%2E&atitle=Conversion%20of%20Nicotine%20in%20Tobacco%20Smoke%20to%20Its%20Volatile%20and%20Available%20Free%2DBase%20Form%20through%20the%20Action%20of%20Gaseous%20Ammonia&pid=%3Cauthfull%3E%3EPankow%2C%20James%20F%2E%3C%2Fauthfull%3E>

- Procedure:

Contact your local CAS SciFinder representative to enable OpenURL in the SciFinder Scholar database and follow the instructions in the **In-house Library Linking** section of the SciFinder Administrator documentation.

This section describes how to establish or change the parameters for the In-house Library Linking service, which users exercise via the ChemPort **Your Library** button. You may enter or change the link text for your site and enter or change the base URLs for journal article and patent links. The words you enter in the link text box will appear when a user places the cursor over the **Your Library** button on the ChemPort page. The link text box must not be left blank.

For the Journal URL, you need to select the OpenURL format. The base URL you enter will be combined with the data from the user's record of interest to produce the URL placed under the **Your Library** button.

## ContentScan

- Parser: DEFAULT

- Status:

OpenURL-aware (Y/N)? Y

All journal and book databases are OpenURL-enabled.

The following metadata elements are provided as part of the OpenURL:

- For journal articles:

- genre
- atitle
- title
- issn

- date
- spage
- volume
- issue
- aulast
- For books:
  - genre
  - title
  - isbn
  - date
  - aulast
- Example:

```
http://demo.exlibrisgroup.com:9003/  
demo?genre=article&atitle=Impulsive+and+sinusoidal+rotatory+testi  
ng%3A+a+comparison+with+results+of+caloric+testing.&title=The%  
20Laryngoscope&issn=0023852X&issndash=0023-  
852X&date=1979&spage=646&volume=89&issue=4&aulast=Baloh
```

- Location of the SFX button:

Each customer can specify a customized button for linking in gif format. On the results page and any citation detail page, a link to **Get this Article** or **Get this Book** is provided.
- Procedure:

ContentScan sales support staff will contact customers to get the base URL.

## COPAC

- Parser: `copac.pm`
- Status:

OpenURL- aware (Y/N)? Y

See <http://copac.ac.uk/interfaces/openurl/> for additional information.
- Contact:

COPAC Helpdesk, [copac@mimas.ac.uk](mailto:copac@mimas.ac.uk)

## CSA : Cambridge Scientific Abstracts

- Parser: CSA .pm
- URLs:  
<http://www.csa.com>
- Status:  
OpenURL-aware (Y/N)? Y
- Procedure:  
Information can be found at: [admin.proquest.com](http://admin.proquest.com)

### To enable OpenURL linking:

- 1 Go to <http://admin.proquest.com/>
- 2 Enter your user name/password - xxxx/xxxxx
- 3 Click **Link using your OpenURL Server**.
- 4 Click **SFX**.
- 5 Enter the base URL of the OpenURL server.
- 6 Select the box to enable the OpenURL image, or label the link using the text box.

---

#### NOTE:

CSA requires a minimum size of 30x150 pixels for the icon.

---

- 7 Click **Enable**.

## CIOS

- Parser: DEFAULT
- Contact details:  
E-mail: [support@cios.org](mailto:support@cios.org)
- Status:  
OpenURL aware?: Y  
Databases that are OpenURL-enabled:
  - Open Journals Index
  - ComAbstracts

The following metadata elements are provided as part of the OpenURL:

- `sid=CIOS:JNX&` (or `sid=CIOS:CAB&`)
- `genre`
- `issn`
- `date`
- `volume`
- `issue`
- `spage=`
- `atitle=`
- Example:

```
http://demo.exlibrisgroup.com:9003/  
demo?sid=CIOS:JNX&genre=article&issn=1354-  
8565&date=2001&volume=7&issue=3&spage=62  
&atitle=Renegade%20refrains:%20MP3%20and%20the%20purs  
uit%20of%20affect%2E&
```

Sites cannot specify a display gif. For ComAbstracts, the default gif will display on the results page. For Open Journals Index, the default gif will display on the brief results page.

- Procedure:

Contact Support at CIOS or place your server information here: <http://www.cios.org/GETOPENURLINFO>

## DIALOG@SITE

- Parser: `DEFAULT`
- Contact details:

E-mail: [OnDisc.Support@dialog.com](mailto:OnDisc.Support@dialog.com)

Documentation can be found in the *Group Administrator Guide* at:

<http://support.dialog.com/guides/atsite/adminguide.pdf>

- Status:

OpenURL-aware (Y/N)? Y

From version 5.22 and later, OpenURLs are dynamically generated for each record and can be set up to contain ISSN, Authors, Journal Title, Title, Publication Year, Volume, Issue, and Page.

- Location of the SFX button:

Vendors have the ability to produce a customized interface for each customer, with a personalized link or button.

- Procedure:

Customers can set their Dialog@site subscription to link to SFX by using the documentation at <http://support.dialog.com/guides/at-site/adminguide.pdf>.

See the **Configuring Local Holdings** section of the *Group Administrator Guide* to set up base URL and metadata elements.

---

**NOTES:**

- Make sure the field codes of the metadata elements are included in the URL (by selecting the check box).

- When specifying your base URL, we recommend using:

```
<base-url>?sid=DIALOG
```

This ensures that the OpenURLs sent by Dialog@site include sid information (important for SFX statistics).

Example of base URL information entered in the Dialog@site administrative interface: <http://demo.exlibrisgroup.com:9003/demo?sid=DIALOG>

---

## EBSCOhost

- Parser: EBSCO.pm

- Main contact details:

Contact EBSCO technical support:

[eptech@epnet.com](mailto:eptech@epnet.com)

<http://www.epnet.com>

- Status

OpenURL-aware (Y/N)?Y

All databases that contain journal literature.

- Location of the SFX button:

Vendors use the SFX gif present at the default location on the customer's SFX server: [http://servername:port/sfx\\_instance/sfx.gif](http://servername:port/sfx_instance/sfx.gif)

- Procedure:

Customers should contact EBSCO's tech support with their base URL for SFX and the EBSCOhost profile they want activated. EBSCO will then set up their ILS linking with a URL mask for OpenURL.

- 1 Contact EBSCO about the fact that you have an SFX server and will want to use the OpenURL-enabled version of Web of Science.
- 2 If your technical support representative has questions, he/she should contact EBSCO support at [eptech@epnet.com](mailto:eptech@epnet.com).
- 3 Send the IP address/IP range of the computers you want to test to make sure the OpenURL access will be restricted to this IP address/IP range. Another option is logon/password for the testing period.
- 4 Send EbscoHost the base URL that they need to insert in the OpenURL:

[http://servername:port/sfx\\_instance](http://servername:port/sfx_instance)

This is the name of the SFX server, port number, and SFX database name.

More information about EbscoHost can be found in **Appendix A: Configuring Bi-Directional Links**.

## Ei Village - Compendex

- Parser: DEFAULT

- Contact details:

Contact your Ei Village customer support: [customer.support@ei.org](mailto:customer.support@ei.org)

- Status:

OpenURL-aware (Y/N)?Y

- Location of the SFX button:

Currently, it is not possible to use an SFX button. Displayed instead is hyperlinked text that can be customized.

- Procedure:

The vendor will set up the OpenURL. The following information needs to be provided:

- base url

- [http://servername:port/sfx\\_instance](http://servername:port/sfx_instance)

This is the name of the SFX server, the port number, and the SFX database name.

- link label (text which is displayed instead of the SFX button)



- URL template:

```
<base-URL>?
sid=EI:Compendex&issn=[ISSN9]&date=[YEAR]&volume=[VOL
UME]&issue=[ISSUE]&spage=[SPAGE]&epage=[EPAGE]&title=[
TITLE]&atitle=[ATITLE]&aulast=[AULAST]&aufirst=[AUFIRST]
```

- Example:

```
http://demo.exlibrisgroup.com:9003/
demo?sid=EI:Compendex&issn=07412223&title=Journal+of+Robotic
+Systems&date=2001&volume=18&issue=9&spage=553&aulast=Che
n&aufirst=W&atitle=Brief+communication:+Uniform+ultimate+boun
dedness+of+a+fuzzy+logic+controlled+industrial+robot
```

## ELSEVIER\_SCIENCE\_DIRECT

- Parser: DEFAULT
- Contact details:
 

Contact your regional Customer Helpdesk.

Information at: <http://www.info.sciencedirect.com/contact.shtml>
- OpenURL-aware (Y/N)? Y
  - The SFX button will appear against each abstract within ScienceDirect.
  - The following metadata is passed:
    - Genre
    - ISSN
    - Year
    - Volume
    - Issue
    - Start Page
    - sid
- Example:

```
http://demo.exlibrisgroup.com:9003/
demo?sid=Elsevier:SD&genre=article&issn=00039926&date=2002&v
olume=162&issue=15&spage=1697
```

- Location of the SFX button:  
Vendors use the SFX gif present at the default location on the customer's SFX server: [http://servername:port/sfx\\_instance/sfx.gif](http://servername:port/sfx_instance/sfx.gif)
- Procedure:  
Customers should contact their Elsevier regional Customer Helpdesk if they want to OpenURL enable their ScienceDirect account.

## ENDEAVOR\_VOYAGER

- Parser: VOYAGER
- Contact details:  
Contact the Customer Helpdesk.
- Procedure:  
OpenURL setup consists of a configuration file on the Voyager side, with a list of the following OpenURL elements:
  - ISSN
  - ISBN
  - Title
  - Author last name
  - Author first nameThe library can configure the MARC fields they would like to use to populate the OpenURL elements.
- Status:  
OpenURL-aware (Y/N)? Y  
The following metadata is passed:
  - ISSN
  - ISBN
  - Title
  - Author last name
  - Author first name
- Example:  
[http://demo.exlibrisgroup.com:9003/  
demo?sid=Endeavor:CitationServer&title=JAMA+&issn=0098-7484](http://demo.exlibrisgroup.com:9003/demo?sid=Endeavor:CitationServer&title=JAMA+&issn=0098-7484)

- Location of the SFX button:  
The gif is pulled from a file called `/images/LinkFinder.jpg` on the Voyager side. It is possible to replace the `LinkFinder.jpg` file with a custom SFX gif.

## Ex Libris - Aleph

- Parser: `ALEPH.pm`
- Contact details:  
Contact your Aleph support representative for details.
- Status:
  - OpenURL-aware (Y/N)? Y
  - Aleph is OpenURL-enabled from version 14.2 and later.
  - The following `rep_changes` need to be applied for version 14.2:
    - `rep_change 14.2 2692`
    - `rep_change 14.2 2782`
    - `rep_change 14.2 3086`
  - The following `rep_change` needs to be applied for version 15.2:  
`rep_change 001046`.
- Location of the SFX button:  
The SFX gif is stored on the Aleph server.

## Configuring Aleph 14.2 (Frames) as an SFX Source

To configure **ALEPH 14.2 (frames)** as an SFX source:

- 1 Log on as the Aleph 14.2 user.  
`cd $alephe_root`
- 2 Edit the file `www_server_defaults` by typing:  
`vi file www_server_defaults`
- 3 In this file, search for the **SFX configuration** section by typing:  
`/SFX configuration`

- 4 Set the `BASE_URL` of the local SFX server by setting the `sfx_base_url` environment variable.

By default, the SFX server that Aleph points to is:

<http://demo.exlibrisgroup.com:9003/demo>

- 5 Define the above by setting the environment variable `sfx_base_url` to:

```
http://demo.exlibrisgroup.com:9003/demo:
```

```
setenv sfx_base_url http://demo.exlibrisgroup.com:9003/demo
```

- 6 In order to point Aleph to the local SFX server, change the `BASE_URL` above to the local SFX server `BASE_URL`.

- 7 Set the Z39.50 server address.

Basic metadata about the record is sent to SFX by Aleph on the metadata zone of the OpenURL.

SFX can obtain additional metadata about the record using a Z39.50 fetch.

- 8 In order to implement the above, set the environment variable `sfx_fetch_address` to the Aleph Z39.50 server.

`sfx_fetch_address` should contain two variables:

- IP – The Aleph server address
- Port – The port on which the Z39.50 server is running

Example:

```
setenv sfx_fetch_address ,Ip=aleph.local.server,Port=9909
```

---

**NOTE:**

By default, the `sfx_fetch_address` is not set.

---

- 9 Save the changes to the file (`wq!`).

- 10 Restart the Web server:

```
dlib <name of aleph database>
util w
stop Web server
start Web server
```

### *Creating a Test Environment for Aleph/SFX - Optional*

In order to create a test environment for Aleph/SFX, it is possible to create a new Aleph base by the name of SFX01.

SFX01 will be a logical database that will access the original Aleph database, but will have different Web pages that will include the SFX button in the bib level and item level.

The same procedure can be used in order to create a test environment for the course reserve database.

### To create SFX01:

- 1 Log on as an Aleph 14.2 user.

```
cd $alephe_tab
vi tab_base.eng
```

- 2 Edit `tab_base.eng` by copying the line that defines the Aleph base and rename it `SFX01`.

For example:

If the Aleph base is defined by the following line:

```
USM01          USMARC (USM01)          USM01          USM01
```

Copy the above line and rename:

- The base name in column #1 to `SFX01`
- The base name in column #2 to `SFX01`
- The base name in column #3 to `SFX01`

Note that the columns in this file are separated by spaces, not <tabs>.

```
SFX01          USMARC (SFX01)          SFX01          USM01
```

- 3 Save changes to `tab_base.eng(wq!)`
- 4 From the prompt, type `wa`.
- 5 Create Web HTML files for the use of SFX01:

```
cp full-set-include-2 full-set-include-2-sfx01
cp item-global-head-2 item-global-head -2-sfx01
cp item-global-head-3-c item-global-head-3-c-sfx01
cp item-global-body item-global-body-sfx01
```

- 6 Restart the Web server using `Util w..`

- 7 Access SFX01 via the Web using:

<http://<your-ALEPH-server>/ALEPH/-/start/SFX01>

### *Hiding SFX Buttons in the Production OPAC*

The SFX button is displayed by default in the bib level, item level, and course reserves.

In order to hide SFX-related items, you must comment out the SFX-related items from the following HTML files:

```
full-set-include-2
full-set-include-2-usm30
item-global-head-2
item-global-head-3-c
item-global-body
```

To comment out the SFX-related items, use the HTML tags `<!--` and `-->`. We recommend making copies of the original files first, as a backup.

### *Debugging*

You can set up the SFX link to display an interim message window that displays the OpenURL.

#### **To set up the SFX link:**

- 1** Log on as the Aleph 14.2 user.
- 2** From the prompt, type `wa`
- 3** View the OpenURL that is created by the bib level/course reserve:
  - a** `vi sfx-doc`
  - b** Change debugging from 0 to 1.
  - c** Save changes (`wq!`).
- 4** View the OpenURL that is created by the item level:
  - a** `vi sfx-issue`
  - b** Change debugging from 0 to 1.
  - c** Save changes (`wq!`).

### *Customizing the SFX Button*

The icon path to the SFX button is defined in `/alephe/www_server_defaults`.

For example:

```
setenv www_sfx      "<img src=${icon_path}&lng/icon/sfx.gif>"
```

It is possible to replace the SFX gif with another one of your choice.

The base needs to be specified in the `aleph.config_` file on the SFX server in:

```
/exlibris/sfx_ver/sfx4_1/<sfx_instance>/config/source/  
OpenURL_0_1
```

```
Section "fetchRecord"  
    module          "SourceParser::ALEPH"  
    syntax          "USMARC"  
    timeout         "30"  
    user            "$0"  
    pass            "$1"  
    base            "ROY01"  
EndSection
```

## Configuring Aleph 14.2 (Frameless), Aleph 15, and Later as an SFX Source

To configure Aleph 14.2 (frameless), Aleph 15, and later as an SFX source:

- 1 From the command prompt, log on as the Aleph 15 user.
- 2 Edit the `www_server.conf` file by entering:

```
cd $alephe_root  
vi www_server.conf
```

- 3 Set the `base_url` of the local SFX server by setting the `sfx_base_url` environment variable. For example:

```
setenv sfx_base_url          http://www.mysfxserver.edu:9003
```

Changing the above `base_url` to the local SFX server `base_url` enables you to point Aleph to the local SFX server.

- 4 Set the `sfx_fetch_address` environment variable to the Aleph Z39.50 server. `sfx_fetch_address` must contain two variables:
  - IP: the ALEPH server address
  - Port: the port on which the Z39.50 server is running.

For example:

```
setenv sfx_fetch_address          ,Ip=aleph.local.server,Port=9909
```

**NOTE:**

The `sfx_fetch_address` environment variable is not set by default.

---

By setting the Z39.50 server address, basic metadata about the record can be sent to SFX by Aleph on the metadata zone of the OpenURL. Additional metadata about the record can be retrieved using a Z39.50 fetch in SFX.

- 5 Save your changes to `www_server.conf` (wq!).
- 6 Restart the Web server from the command prompt:

```
dlib <name of ALEPH database>
util w
```

- 7 Select **Stop Web server**, then **Start Web server**.
- 

**NOTE:**

To configure versions later than Aleph 15 as an SFX source, perform the same procedure as for Aleph 15.

---

### *Creating a Test Environment for Aleph/SFX - Optional*

In order to create a test environment for Aleph/SFX, you can create a new Aleph base called SFX01. SFX01 is a logical database that accesses the original Aleph database, but has different Web pages that include the SFX button in the bib level and item level.

The same procedure can be used in order to create a test environment for the course reserve database.

#### **To create SFX01:**

- 1 Log on as the Aleph 15 user.
- 2 From the command prompt, enter the following:

```
cd $alephe_tab
vi tab_base.lng
```

- 3 Edit `tab_base.lng`. Copy the line that defines the Aleph base and rename it to SFX01.

For example, if your Aleph base is defined by the following line:

```
USM01          USMARC (USM01)          USM01          USM01
```

Copy the above line and rename:



- The base name in Column 1 to SFX01
- The base name in Column 2 to SFX01
- The base name in Column 3 to SFX01

Note that the columns in this file are separated by spaces, not <tabs>:

SFX01	USMARC (USM01)	SFX01	USM01
-------	----------------	-------	-------

- 4 Save changes to `tab_base.lng` (wq!)
- 5 From the prompt, type `wf`. This shortcut takes you to the `www_f_lng` directory, which stores the Aleph HTML files.
- 6 Create Web HTML files for the use of SFX01:

```
cp full-set-head full-set-head-sfx01
cp item-global-head-3-c item-global-head-3-c-sfx01
cp item-global-body item-global-body-sfx01
```

- 7 Restart the Web server using UTIL W.
- 8 Access SFX01 via the Web using:  
[http://<your-ALEPH-server:port>/F/func=file&file\\_name=basic&local\\_base=SFX01](http://<your-ALEPH-server:port>/F/func=file&file_name=basic&local_base=SFX01)

### *Hiding SFX Buttons in the Production OPAC*

The SFX icon appears by default in the bib level, item level, and course reserves. In order to hide SFX-related items, you must comment out the SFX-related items from the following HTML files:

```
full-set-head
full-set-head-usm30
item-global-head-3-c
item-global-body
```

To comment out the SFX-related items, use the HTML tags `<!--` and `-->`. We recommend making copies of the original files first as a backup.

### *Debugging*

You can set up the SFX link to display an interim message window that displays the OpenURL.

**To set up the SFX link:**

- 1 Log on as the Aleph 15 user.
- 2 From the prompt, type `wf`
- 3 View and edit the OpenURL that is created by the bib level/course reserves:

```
vi sfx-record
```

- 4 Change debugging from 0 to 1.
- 5 Save changes (`wq!`).

**SFX Icon**

The path to the SFX icon is defined in `/alephe/www_server.conf`.

For example:

```
setenv www_sfx      "<img src=${icon_path}&lng/icon/sfx.gif>"
```

You can replace the SFX gif with another one of your choice.

Specify the base in the `aleph.config_` file on the SFX server in:

```
/exlibris/sfx_ver/sfx4_1/<sfx_instance>/config/source/  
OpenURL_0_1
```

```
Section "fetchRecord"  
    module      "SourceParser::ALEPH"  
    syntax      "USMARC"  
    timeout     "30"  
    user        "$0"  
    pass        "$1"  
    base        "ROY01"  
EndSection
```

## Ex Libris - MetaLib

- Parser: `metalib.pm`
- Contact details:  
Contact your MetaLib support person for details.

- Status:  
OpenURL-aware (Y/N)? Y
- Setting up linking to SFX:  
Refer to the appropriate version of the MetaLib documentation for information regarding setting up linking to SFX.
  - For setting up linking to SFX from MetaLib version 4.x, refer to the **SFX Setup in MetaLib** section of the *MetaLib User Interface Guide*, version 4.x.
  - For setting up linking to SFX from MetaLib version 3.13, refer to the **SFX Server and Instance** section of the *MetaLib User Interface Guide*, version 3.13.
- Cookies for SFX:  
When the user logs on to MetaLib, MetaLib sends SFX information about the user, including his or her institution, division, user group, user ID, and language interface preference. SFX creates a cookie on the user's PC with this information, which is used to create thresholds for SFX services.

**To enable the above feature on the SFX server for a specific instance:**

- 1 Log on to the SFX server as the instance user (for local logon as sfx1c141).
- 2 Type `cd /exlibris/sfx_ver/sfx4_1/<instance>/config`  
(the shortcut = cn).
- 3 Type `vi local_httpd.config`
- 4 Add the following script alias to the beginning of the `local_httpd.config` file (<instance> should be replaced with the actual instance name and the script alias should contain no line breaks).

```
ScriptAlias /<instance>/user_cookie
"/exlibris/sfx_ver/sfx4_1/<instance>/cgi/public/
user_cookie.cgi"
```

- 5 Restart Apache for the instance sfx1c141, using the `server_admin_util` that is located at:  
`/exlibris/sfx_ver/sfx4_1/<instance>/admin`
  - a Type: `./server_admin_util`
  - b Select 1 and then 8. (1 is to Start/Stop services, 8 is to restart Apache for the instance)

## Ex Libris - Primo

- Parser: `primo.pm`
- Status:  
OpenURL-aware (Y/N)? Y
- Procedure:  
Refer to the *Primo Interoperability Guide* for details on configuring Primo to work with SFX.

---

**NOTES:** Primo sends two types of OpenURLs to SFX, depending on the type of record displayed in Primo:

- Complete works such as journals, books, and digital objects are sent using `sid primo.exlibrisgroup.com:primoJournal.*`. For these, SFX ignores the date threshold and displays all services available for the item. This is the `PRIMO_JOURNAL` source in the SFX KB source table.
- Partial records, such as articles, are sent using `sid primo.exlibrisgroup.com:primoArticle.*`. For these, SFX evaluates the date sent from Primo against the date thresholds and displays only the services matching the exact item requested. This is the `PRIMO` source in the SFX KB source table.

---

**NOTE:**

The `getRecommendation` service is not available for the Ex Libris Primo source, because the `bX` recommendation service is displayed in a separate tab in Primo. It was therefore decided to not have the `getRecommendation` service in the full SFX menu from Primo.

---

## Family Scholar Publications

- Parser: `FAMILY.pm`
- Contact details:  
[support@famindx.com](mailto:support@famindx.com)  
Family Scholar Publications  
1001 University Avenue  
Suite 401  
Columbia, MO 65201  
<http://www.familyscholar.com/>



- Status:

OpenURL-aware (Y/N)? Y

- Overview:

You can use the Admin tools on FSTA Direct to choose which links to display at the end of a record, including OpenURL links. Additionally, using the Admin tools you can enter a URL of a server to upload an image to display on a record. The maximum size of the image is 70 x 30 pixels (jpg or gif).

For more information, see the Help pages on FSTA Direct (<http://www.fstadirect.com/fstadhelp>).

Customers can call FSTA Direct or e-mail questions to [ifis@ifis.org](mailto:ifis@ifis.org).

## GaleGroup

- Parser: DEFAULT

- Contact details:

Gary Pollack

Manager, Product Platforms

Gale Group

800.877.4253 x8129

[gale.technicalsupport@thomson.com](mailto:gale.technicalsupport@thomson.com)

- Status:

OpenURL-aware (Y/N)? Y (InfoTrac only)

Available from Sept 18th 2001.

- Location of the SFX button:

Vendors use the SFX gif present at the default location on the customer's SFX server:

[http://servername:port/sfx\\_instance/sfx.gif](http://servername:port/sfx_instance/sfx.gif)

- Overview:

To use the SFX feature, make changes to the information in InfoTrac Config:

- Enable the feature (in the Preferences module) for the location in which you want to deploy the SFX feature, as described in **Enabling SFX Preferences** on page 39.
- Enter the SFX server base URL of your library's SFX server in the Location module, as described in **Configuring Locations** on page 40.

## Enabling SFX Preferences

Different locations can be assigned different preference settings. You must make sure that the SFX feature has been enabled in the preferences used by the desired location.

### To enable SFX preferences:

- 1 Start InfoTrac Config.

To use InfoTrac Config, you must have a valid user name and password that has been assigned privileges to modify preferences and locations. See the *InfoTrac Config User's Guide* (available on the Gale Group Web site) for detailed information about starting and using InfoTrac Config.

- 2 Click the **Preferences** link.

The Preferences screen is displayed. This screen shows all of the preference sets that you have defined.

- 3 Click the **Modify** link under the preference set associated with the location at which you want to implement the SFX feature.

The Preferences Details screen is displayed.

If a Modify link does not appear under the preference sets, it means that you have not been assigned privileges to modify preference sets. Contact your InfoTrac Config system administrator.

- 4 Scroll to the bottom of the page.

The Citation Page Options, Article Page Options, and Mark List Options are displayed.

- 5 Select one or all of the following **Yes** radio buttons as desired:

- To include an SFX icon on the Citation List, select the **Yes** radio button next to **Display SFX button on citation page?** under **Citation Page Options**.
- To include an SFX icon with article retrieval options, select the **Yes** radio button next to **Display SFX button with article retrieval options?** under **Article Page Options**.
- To include an SFX icon on the Mark List, select the **Yes** radio button next to **Display SFX button with the Mark List?** under **Mark List Options**.

Setting these options to **Yes** without modifying location information as shown in the next section does not enable the SFX feature.

- 6 Click the **Save** button at the bottom of the page.

The Preferences screen is displayed.

- 7 If desired, click the **Modify** link under the other preference sets to make the same modification.

- 8 When you have finished modifying preference sets, go back to the main InfoTrac Config screen.
- 9 Proceed to the next section to configure locations.

## Configuring Locations

The next step in enabling the SFX feature is to modify your location information in InfoTrac Config. Specify the SFX server base URL.

### To configure locations:

- 1 Click the **Locations** link in InfoTrac Config. The Locations screen is displayed. This screen shows the locations that you have defined.
- 2 Click the **Modify** link for the location in which you want to enable the SFX feature. The Location Details screen is displayed.  
  
If a Modify link does not appear with the locations, it means that you have not been assigned privileges to modify locations. Contact your InfoTrac Config system administrator.
- 3 Scroll to the bottom of the page. The field shown in the picture to the right is displayed.
- 4 Enter the SFX (server) URL.  
  
Enter the base URL of the SFX server.  
  
Example:  
  
<http://mylibrary.sfxserver.lib.us>
- 5 Click **Save** at the bottom of the Locations screen. The Locations screen is displayed.
- 6 If desired, select the **Modify** link for other locations to make the same modifications.
- 7 When you have finished modifying locations, exit InfoTrac Config.

The SFX feature is now operational.

The above information is contained in an SFX Technical Bulletin available from the Gale Group Web site at [www.galegroup.com](http://www.galegroup.com) or from the Gale Group Customer Resource Center technical support staff. You can contact the Gale Group Customer Resource Center staff at:

Tel: +1.800.877.GALE (4253) and select Option 4 (#4)

Tel: +1.248.699.4253 and select Option 4 (#4)

Fax: +1.800.676.2345

Fax: +1.248.699.8906



Other North American customer support contacts:

[http://www.galegroup.com/cust\\_serv/](http://www.galegroup.com/cust_serv/)

International customer support contacts:

<http://www.galegroup.com/world/contact.htm>

### **InfoTrac Web Products that Are SFX/OpenURL-Compliant**

- Academic ASAP
- Academic Index Backfile
- Academic ASAP and Backfile
- Academic Index
- Academic Index Backfile
- Academic Index
- BIP - Books in Print
- BIPR - Books in Print with Book Reviews
- Business Index ASAP
- Business Index Backfile
- Business Index
- Business ASAP International
- Business ASAP International
- Business and Company ASAP
- Business and Company ASAP
- Business and Company Profiles
- Business and Company Profiles
- Business International and Company Profiles
- Business International and Company Profiles Megafile
- Contemporary Authors
- Contemporary Literary Criticism
- Computer Database
- Custom Newspapers ASAP
- Custom Periodicals
- European Business ASAP
- European Business ASAP Plus

- Expanded Academic ASAP
- Expanded Academic ASAP International
- F&S Index Plus Text - US
- F&S Index Plus Text - Int'l
- Facts On File
- Gen'l Reference Ctr (Magazine Index)
- Gen'l Reference Ctr Gold (GPIP)
- General Reference Centre
- General Reference Center Select
- General Academic ASAP
- General Academic Index
- General BusinessFile ASAP
- General BusinessFile Internat'l
- General BusinessFile Internat'l
- Health Reference Center
- Health Reference Center-Academic
- Newspapers ASAP
- Newsletters ASAP
- ¡Informe! (Revistas en Español)
- InvesText
- ISI Current Contents
- ISI Current Contents - This Week
- InfoTrac OneFile
- LegalTrac
- National Newspaper Index
- PAIS International
- Predicasts PROMT
- PsycINFO
- PsycINFO Backfile
- InvesText Plus
- Sociological Abstracts
- Student Edition (SuperTOM)

- Junior Edition (SuperTOM Junior)
- Kid's Edition (Primary TOM)

## Google Scholar

### Introduction

Google Scholar (<http://scholar.google.com>) supports the inclusion of OpenURLs in its search results to facilitate access to scholarly articles for library patrons through institutional link resolvers such as SFX.

There are two ways in which users may view OpenURL links from Google Scholar results.

- Libraries register with Google Scholar. Through registration, all users from IP ranges registered by their librarian will automatically have OpenURL links. This serves all on-campus users.
- Users are able to select their institutional affiliation as a preference in Google scholar. This serves off-campus users.

Library registration for Google Scholar OpenURL-enabling is accomplished by the completion of two tasks in the SFX Administration module:

- Export active getFullTxt portfolios to create data files that Google Scholar harvests from the local SFX server. This export capability is available from the SFX Export tool in SFXAdmin.

The export files used by Google to specifically indicate in the Google Scholar search results when electronic full text is available from the end user's institutional library.

- Provide library-specific registration information via a form accessible in SFXAdmin under the header **Services**. This registration includes library contact and `base_URL` details as well as the location of the holdings data file and is made available to Google Scholar by Ex Libris.

### Google Scholar Set-Up Instructions

This section describes the set-up instructions for Google Scholar.

#### *Defining Access for Google Crawling*

Your holdings information is made available to Google Scholar via a CGI created especially for this purpose: `get_file.cgi`. Access to the CGI is restricted via a config file, located at `/exlibris/sfx_ver/sfx4_1/<instance>/config/get_file_restriction.config_`

By default, this configuration file contains only the IP addresses of the Ex Libris Boston and Jerusalem offices and IP addresses of the Google Scholar team. This means that the holdings files are viewable only to these parties.

---

**NOTE:**

If you have not applied SP 4.1.4, add the following IP address to this configuration file: 74.217.12.52

---

A file called `robots.txt` allows the Google Scholar institutional access crawler to have access to the holdings data on the SFX server, but keeps all of Google's other crawlers out. This prevents the institution's holdings files from accidentally appearing on [www.google.com](http://www.google.com), where potentially unintended users can look at the cached copy and thus bypass the institution's authentication. Although this scenario is unlikely, it is not impossible.

You need to place the file `robots.txt` in the correct location on the server. It suffices for all instances on the server.

**To place the robots.txt file on the server:**

- 1 Log on as `sfxglb41`.
- 2 Type `cv`.
- 3 Type `cd proxy/htdocs/`
- 4 Check if the `robots.txt` file exists in this directory by typing `ls`. If the file exists, no changes need to be made. If the `robots.txt` file does not exist, copy the file from the home directory of the `sfxglb41` instance to the current directory:

```
cp /exlibris/sfx_ver/sfx4_1/sfxglb41/home/robots.txt .
```

### *Creating a Holdings File*

- 1 Log on to the SFX Admin Center of the production instance.
- 2 Go to **Export Tool** (under KBTools).
- 3 Select the **Advanced Export Queries** tab.
- 4 Select the **Google Scholar** radio button.
- 5 Select both **Serials** and **Monographs** object types.
- 6 Select **Compress output files**.
- 7 Click the **Submit** button to start the export.

DataLoader | **Export Tool** | Collection Tool

## Welcome to Export Tool

Basic Export Queries | **Advanced Export Queries** | Advanced Export Profiles

### Query Selection

**Advanced Export:**

Select Output format:

TXT  HTML  XML  Aleph Sequential  
 PubMed XML LinkOut  Google Scholar

Export which object types:

Serials  Monographs

Use the following additional export file (optional):

Export active portfolios with the following services:

getFullTxt  getSelectedFullTxt  getHolding  getTOC  getAbstract

Export from  targets.

**Chinese Titles Export include the following (if exists):**

Simplified Chinese Title  
 Traditional Chinese Title  
 Both Simplified and Traditional Chinese Titles

*Note: A dropdown menu for "Restrict to the following institutes/groups (optional)" is visible, containing: DEFAULT, Biology, Chemistry, MIT\_Cambridge, MIT\_Lincoln\_Labs.*

Figure 1: Google Scholar

**NOTES:**

- If multiple institutes are defined in one instance, select **Restrict to following institutes /groups (optional)** before running the export.
  - If data from a shared instance is used by a local instance (SFX Consortium Model 2), an export must first be run to create a TXT file from the shared instance (restricting to institutes if appropriate) and used in section 3 **Use the following additional export file** for the Google Scholar export, which would be run from the local instance.
- 

The Google Scholar holdings files are created in the export directory of your instance (`/exlibris/sfx_ver/sfx4_1/<instance>/export`). The export file is an XML file which includes ISSN, ISBN, title, author, and coverage information. The names of any of your active targets and target services (that is, the provider) are not included in the file.

As per Google's instructions, the complete XML file is split into multiple smaller files and compressed by default (using `gzip`) for faster download by the Google Scholar crawling engine. The complete uncompressed file, however, is also created and remains in the SFX instance export directory (together with the new split files), since the complete file can also be used by Primo Central and other systems.

Note that it is possible to schedule a regular generation of the holdings files via the `server_admin_util` tool in the UNIX file system for the instance. In this way, the library will always be making a fresh file of its holdings, available for the Google Scholar crawlers.

**To generate holdings files via the `server_admin_util` tool:**

- 1 Log on to the UNIX server as an instance user.
- 2 Type `cd` to move to the `/exlibris/sfx_ver/sfx4_1/<instance>/admin` directory.
- 3 Type `./server_admin_util` to start the tool.
- 4 Select option **9 Export GOOGLE institutional holdings file**.

```
Export GOOGLE institutional holdings Tools
 1 (Re)Export GOOGLE institutional holdings file
 2 Show scheduled export GOOGLE institutional holdings file
 3 Schedule export GOOGLE institutional holdings file
```

- 5 Type `1` to create the export file.

For more information on available UNIX command-line scripts for the Google Scholar export, see the **Command Line Export Tool** section of the *SFX Advanced User's Guide*.

### Filling Out the Google Scholar Registration Form

To register for Google scholar, click **Google Scholar Registration** from the SFX Admin Center. The following is displayed:

**Google Scholar Registration**

Please use this form to enter information that will enable Google Scholar to display your SFX links

\* This is the full name of your institution. It will be displayed in the user's Google Scholar Preferences.

Keywords (to help people find your institution in preferences, single word per line, max 30 char):  
Hint: You might wish to include any well-known nicknames or acronyms for your institution, as well as the name of your state or country

Is your SFX server protected by a Firewall?  Yes  No

Check SFX baseURL validity during registration (Uncheck if currently SFX is not accessible from outside)

\* URL to electronic holdings [what is this?](#)

[http://il-sfx04:3420/michael/cgi/public/get\\_file.cgi?file=institutional\\_holding.xml](http://il-sfx04:3420/michael/cgi/public/get_file.cgi?file=institutional_holding.xml)  
[http://il-sfx04:3420/michael/cgi/public/get\\_file.cgi?file=institutional\\_holding-prt01.gzip](http://il-sfx04:3420/michael/cgi/public/get_file.cgi?file=institutional_holding-prt01.gzip)  
[http://il-sfx04:3420/michael/cgi/public/get\\_file.cgi?file=institutional\\_holding-prt02.gzip](http://il-sfx04:3420/michael/cgi/public/get_file.cgi?file=institutional_holding-prt02.gzip)  
[http://il-sfx04:3420/michael/cgi/public/get\\_file.cgi?file=institutional\\_holding-prt03.gzip](http://il-sfx04:3420/michael/cgi/public/get_file.cgi?file=institutional_holding-prt03.gzip)  
[http://il-sfx04:3420/michael/cgi/public/get\\_file.cgi?file=institutional\\_holding-prt04.gzip](http://il-sfx04:3420/michael/cgi/public/get_file.cgi?file=institutional_holding-prt04.gzip)  
[http://il-sfx04:3420/michael/cgi/public/get\\_file.cgi?file=institutional\\_holding-prt05.gzip](http://il-sfx04:3420/michael/cgi/public/get_file.cgi?file=institutional_holding-prt05.gzip)  
[http://il-sfx04:3420/michael/cgi/public/get\\_file.cgi?file=institutional\\_holding-prt06.gzip](http://il-sfx04:3420/michael/cgi/public/get_file.cgi?file=institutional_holding-prt06.gzip)  
[http://il-sfx04:3420/michael/cgi/public/get\\_file.cgi?file=institutional\\_holding-prt07.gzip](http://il-sfx04:3420/michael/cgi/public/get_file.cgi?file=institutional_holding-prt07.gzip)  
[http://il-sfx04:3420/michael/cgi/public/get\\_file.cgi?file=institutional\\_holding-prt08.gzip](http://il-sfx04:3420/michael/cgi/public/get_file.cgi?file=institutional_holding-prt08.gzip)  
[http://il-sfx04:3420/michael/cgi/public/get\\_file.cgi?file=institutional\\_holding-prt09.gzip](http://il-sfx04:3420/michael/cgi/public/get_file.cgi?file=institutional_holding-prt09.gzip)  
[http://il-sfx04:3420/michael/cgi/public/get\\_file.cgi?file=institutional\\_holding-prt10.gzip](http://il-sfx04:3420/michael/cgi/public/get_file.cgi?file=institutional_holding-prt10.gzip)

\* Label of SFX links:

When article exists electronically (based on your holdings as submitted to Google Scholar):

When Article does not exist electronically (but other services may be available via your SFX menu):

Patron IP Range (e.g 123.12.12.\*, 123.12.12.1-123.12.12.99):  
(Maximum of 256 IP ranges)

Show SFX links only to users that come from your IP range?  Yes  No

Is your SFX server configured to provide holding service? [Why are you asking?](#)  Yes  No

Figure 2: Google Scholar Registration

**To fill out this form:**

- 1 If multiple institutes are configured in your SFX instance, select an institute from the Institute dropdown list before accessing the registration form.
  - Select **Default** if the defined institutes are subdivisions within your university, and you are registering your university as a whole with Google.
  - Select the specific institute if your SFX instance has been set up as a consortium, with each institute representing a university you want to register separately with Google.
- 2 Fill out all of the fields of the form and click the **Register** button. Note that the location of the holdings files is automatically filled in. (For more information on file compression, see [Creating a Holdings File](#) on page 44.)

---

**NOTE:**

SFX checks that the SFX baseURL is valid as part of the registration process. If you have an SFX server behind a firewall, this validation fails and the registration is not allowed. Clear the **Check SFX baseURL validity during registration** check box to opt out of this SFX baseURL check.

---

Your registration information is submitted to Ex Libris for harvesting by Google Scholar. It is checked for data validity, that the server's `base_URL` and holdings files exist and are accessible, and that your SFX server supports DOI and PubMed ID resolution.

---

**NOTES:**

- You must create the holdings files before you register. If you attempt to register before the local holdings file is created, an error message is displayed.
  - It is not possible to specify per institute registration a different `base_url` (in format `<base-url><institute>`). The `base_url` is identical for all registrations in the same SFX instance. For off-campus users, the `<base-url><institute>` method cannot be used to define the user institute affiliation in the SFX ContextObject.
- 

### ***General Information***

Once Google has crawled the registration file generated by the registration process and the institution's holdings files, you should be able to start using Google Scholar as an SFX source and see `getFullText` indicators for SFX electronic journals in the Google Scholar results list.



---

**NOTE:**

It may require up to seven days before the crawling begins. Contact Google if you have any questions or problems with this part of the process.

---

All other comments, questions, or problems should be reported to your local Ex Libris support center.

## HLAS - Handbook of Latin American Studies

- Parser: DEFAULT  
Information can be found at <http://lcweb2.loc.gov/hlas/hlashome.html>
- Status:  
OpenURL-aware (Y/N)? Y  
OpenURLs contain the following metadata elements:
  - genre
    - article
    - bookitem
    - book
  - issn
  - isbn
  - title
  - volume
  - issue
  - pages
  - date
  - aulast
  - atitle
- Example:

[http://demo.exlibrisgroup.com:9003/  
demo?sid=LC:HLAS&genre=book&isbn=0914778706&title=Mexican  
%20etiquette%20and%20ethics%20%3a&aulast=De%20Mente](http://demo.exlibrisgroup.com:9003/demo?sid=LC:HLAS&genre=book&isbn=0914778706&title=Mexican%20etiquette%20and%20ethics%20%3a&aulast=De%20Mente)

---

**NOTE:**

Only HLAS records from volume 50 onwards have an SFX button.

---

■ Location of the SFX button:

HLAS uses the SFX gif at the location specified when accessing the cookie-pusher.

Example:

```
http://servername:port/sfx_instance/sfx.gif
```

■ Procedure:

Use cookie-pusher to identify the base URL and the SFX button for the SFX server being used.

To set the correct base URL and the SFX button, use the following URL:

```
http://lcweb2.loc.gov/cgi-bin/pushcookie?BASE-URL=<sfx_server>:<port>/<instance>&OpenLink=<<sfx_server>:<port>/<instance>/sfx.gif&Redirect=http://lcweb2.loc.gov/hlas/mdbquery.html
```

Example:

```
http://lcweb2.loc.gov/cgi-bin/pushcookie?BASE-URL=demo.exlibrisgroup.com:9003/demo&OpenLink=demo.exlibrisgroup.com:9003/demo/sfx.gif&Redirect=http://lcweb2.loc.gov/hlas/mdbquery.html
```

## H W Wilson

■ Parser: DEFAULT

■ Contact details:

Ron Miller

Director of Product Management

H.W. Wilson

718-588-8400 xt2743

■ Status:

OpenURL-aware (Y/N)? Y

■ Location of the SFX button:

Vendors allow you to specify a custom SFX gif (with size restrictions).

## INGENTA

- Parser: DEFAULT
- Contact/Questions: [help@ingenta.com](mailto:help@ingenta.com)
- Status:
 

OpenURL-aware (Y/N)? Y

Ingenta Select is active as an OpenURL source. Ingenta.com is not currently an OpenURL source
- Location of the SFX button:
 

INGENTA: Vendor allows you to specify a custom SFX gif. The default location on the SFX server of the customer is [http://servername:port/sfx\\_instance/sfx.gif](http://servername:port/sfx_instance/sfx.gif)

Metadata sent:

  - ISSN (always)
  - year (always either year or volume)
  - volume (always either year or volume)
  - month (if available)
  - issue (if available)
  - start page of article (always)
  - article title (if available)
  - journal title (if available)
- Activating Ingenta Select as a source in SFX:
 

Users of Ingenta Select can add details about their link server to their registration (click **Update Registration - Institution**).

Enter your CID and manager password and then follow the **Create** link from the link server box at the bottom of the page.

Once you have enabled a link server, users who follow a reference link from Ingenta Select see your link server as an option. This lists local holdings.

## III : Innopac

- Parser: INOV.pm

- Status:

- OpenURL-aware (Y/N)? Y

The OpenURL currently contains the following metadata elements:

sid + ISSN or ISBN

OpenURL Example:

```
http://sfx.univ.edu:9003/sfx\_local?sid=III:innopac&pid=id=0001-8087
```

- Location of the SFX button:

It is possible to use a customized SFX button.

- Procedure:

- 1 In the III OPAC, set up outbound linking from the `wwwoptions` file. The template should look like this:

```
http://servername:port/instance?sid=III:innopac&pid=id=0001-8087
```

Example:

```
http://athena.rit.edu:9003/rit?sid=III:innopac&pid=id=\(022/020\)
```

- 2 Optional – If you do not want the INNOPAC target to be displayed when you are using INNOPAC as a source, add the following:

In KBManager, add the following threshold to the `LOCAL_CATALOG_INNOVATIVE_INNOPAC` target:

```
$obj->need( 'rec$parserId', 'ne', 'INOV' )
```

If there are already thresholds there, use the boolean operator `&&` to add this new threshold.

- 3 Optional – Use a special displayer to show specific availability information of full text journals in the SFX menu screen.

To set up this displayer, refer to the **Using a special displayer to show date threshold information in the SFX menu screen** section of the *SFX Advanced User's Guide*.

- 4 If your institution has Z39.50 access enabled, SFX can retrieve a full MARC record, including subject, title, and author. Fill in the fields for the host and port of the Z39.50 server in the `inov.config_` file.

## Institute Of Physics (IOP)

- Parser: DEFAULT
- Main contact details:

Judith Barnsby  
Senior Product Manager: EJs Systems & Information  
Institute of Physics Publishing  
Dirac House, Temple Back  
Bristol BS1 6BE  
Tel: +44 (0)117 930 1107  
Fax: +44 (0)117 920 0822  
E-mail: [judith.barnsby@iop.org](mailto:judith.barnsby@iop.org)  
Web: [www.iop.org](http://www.iop.org)  
or  
[custserv@iop.org](mailto:custserv@iop.org)
- Status:

OpenURL-aware (Y/N)? Y  
Electronic Journals - August 2000  
OpenURL implemented at article reference level and also at abstract level.  
Axiom - Feb 2001  
Axiom contains the Inspec, Compendex, and Derwent patent databases.
- Procedure:

IOP journals collection uses `cookie_pusher`:  
[http://www.iop.org/EJ/sfx\\_cookie?BASE-URL=http://sfx1.exlibris-usa.com/demo&Redirect=http://www.iop.org/EJ/welcome](http://www.iop.org/EJ/sfx_cookie?BASE-URL=http://sfx1.exlibris-usa.com/demo&Redirect=http://www.iop.org/EJ/welcome)

## ISI Researchsoft - Endnote

- Parser: DEFAULT
- Contact details: Endnote support team

- Status:  
OpenURL-aware (Y/N)? Y  
Endnote is OpenURL-enabled from version 7 and later. The OpenURL setup is performed in the Endnote client software.

#### To set up SFX linking:

- 1 Click **Edit** and select **Preferences**. In the list of preferences (left side of the screen), click **OpenURL**.
- 2 Select the **Enable OpenURL** check box and specify the OpenURL path. Fill in the SFX base URL: [http://servername:port/sfx\\_instance](http://servername:port/sfx_instance)  
(This is the name of the SFX server, port number, and SFX instance.)
- 3 In the **Arguments** section, change the sid from `ISI:WoS` to `ISI:endnote`  
All other information in the Arguments section should be kept as is.

#### To use SFX linking:

- 1 In the Endnote library, double-click a reference to open it.
  - 2 Click **References** and select **OpenURL**.
- The SFX menu screen contains SFX links for the selected reference.

## ISI Web of Knowledge

- Parser: DEFAULT
- Main contact details:  
TR Links Team - [ts.isilinks@thomson.com](mailto:ts.isilinks@thomson.com)
- Status:  
OpenURL-aware (Y/N)? Y  
Available in Web of Science version 4.3 and later.  
User profiles held at ISI determine the base URL for the OpenURL. Notify your usual ISI support person of your base URL.  
The following ISI databases are OpenURL-enabled:
  - WoS
  - CCC
  - INSPEC
  - BIOSIS

- PsycINFO
- Location of the SFX button:  
You can provide a URL for a custom SFX button image in the following form:  
<http://interest.science.thomsonreuters.com/forms/WebofKnowledgefulltextlinkingmethods>
- Procedure:  
You can request an SFX OpenURL with the following form:  
<http://interest.science.thomsonreuters.com/forms/WebofKnowledgefulltextlinkingmethods>  
For more information about links, click the **Contact the Links team** link at the following location:  
[http://wokinfo.com/products\\_tools/products/related/trlinks/](http://wokinfo.com/products_tools/products/related/trlinks/)

## ISI Web of Knowledge (MIMAS) - UK only

- Parser: DEFAULT
- Main contact details: [wok@mimas.ac.uk](mailto:wok@mimas.ac.uk)
- Status:  
OpenURL-aware (Y/N)? Y  
Available in Web of Science version 4.3 and later.  
This source does not currently include BIOSIS or Current Contents Connect from ISI, but we anticipate that these will also be OpenURL-enabled shortly.
- Procedure:
  - 1 Contact MIMAS at the e-mail address above about the fact that you have an SFX server and want to use the OpenURL-enabled version of Web of Science.
  - 2 Send the IP address/IP range of the computers you want to test to make sure the OpenURL access is restricted to this IP address/IP range. Emphasize that you want the OpenURL access to be restricted to these IPs.
  - 3 Send the base URL that needs to be inserted in the OpenURL to MIMAS:  
[http://servername:port/sfx\\_instance](http://servername:port/sfx_instance)  
This is the name of the SFX server, port number, and SFX database name.

## JSTOR

- Parser: DEFAULT
- Contact details:  
[jstor-info@umich.edu](mailto:jstor-info@umich.edu)
- OpenURL-aware (Y/N)? Y  
JSTOR allows links from JSTOR journals to current, full-text articles available through other resources using the OpenURL.
- Location of the SFX button:  
It is possible to use a customized SFX button.
- Procedure:  
Information about the procedure can be found at:  
<http://about.jstor.org/support-training/help/enabling-openurl-links>

## MEDPILOT

- Parser: DEFAULT
- Contact details: [medpilot@zbmed.de](mailto:medpilot@zbmed.de)
- Description:  
Free medical information Web portal ([www.medpilot.de](http://www.medpilot.de)) operated by the German National Library of Medicine, allowing federated searching of a comprehensive set of medical literature, including MEDLINE and dozens of other medical bibliographic and full-text databases highlighting a large collection of German-language medical literature. Optional links to paid databases such as EMBASE and document delivery are integrated. MedPilot is available with a German or an English interface.  
  
As of the summer of 2005, MedPilot features unconditional links to a customer's SFX menu and services from within its availability window for each record. MedPilot also utilizes dynamic lookup capability with a local SFX server in order to show full-text buttons in a results display only when full-text is actually available from SFX. This feature uses the XML capability of SFX, which is included in every SFX installation by default.
- Location of the SFX button:  
It is possible to use a customized SFX button. MedPilot uses the standard location of the customized SFX gifs on the SFX server.



- Procedure:  
Send your request with the institution's name, contact name (and phone number), as well as IP ranges and SFX `Base_URL` to [medpilot@zbmed.de](mailto:medpilot@zbmed.de).

## NAVER\_SCHOLAR

- Parser: DEFAULT
- Contact details:  
Name: Ho-Sik Chung  
Mail: [hosik.chung@nhn.com](mailto:hosik.chung@nhn.com)  
Phone: 82+ 31 - 784 - 2795
- Status:  
OpenURL?aware (Y/N)? Y
- OpenURL information:  
sid= naver  
no pid
- Location of the SFX button:  
Vendors provide the option to use an image specified by the institution or the default text – `Availability` – in both the full and brief record.

## NCBI PubMed

- Parser: DEFAULT
- Contact details:  
E-mail: [lib-linkout@ncbi.nlm.nih.gov](mailto:lib-linkout@ncbi.nlm.nih.gov)
- Status:  
OpenURL-aware (Y/N)? Y
- Location of the SFX button:  
The location of the SFX icon needs to be sent to PubMed when the library asks for OutsideTool/LinkOut to be set up.
- Procedure:  
More information can be found at:  
<http://www.ncbi.nlm.nih.gov/entrez/linkout/doc/openurlfaq.html#integrate>  
Write to [lib-linkout@ncbi.nlm.nih.gov](mailto:lib-linkout@ncbi.nlm.nih.gov) for questions and setup procedures.

- Description:

PubMed supports OpenURL links and users can point to an SFX menu of services either through LinkOut or Outside Tool. For the former, links are attached to a subset of PubMed records and searches in PubMed can be limited to a participating library's links. For the latter, links appear in all PubMed records.

Information about Outside Tool can be found at:

<http://www.ncbi.nlm.nih.gov/books/NBK3803/>

Information about LinkOut can be found at:

<http://www.ncbi.nlm.nih.gov/projects/linkout/doc/liblinkout.html>

Specific information about LinkOut and the OpenURL can be found at:

<http://www.ncbi.nlm.nih.gov/projects/linkout/doc/openurlfaq.shtml>

NLM stipulates that links from either LinkOut or Outside Tool must point to specific resources that are relevant to the corresponding PubMed records. At a minimum, SFX services that are available for any PubMed record should include at least one of the following services:

- Full-text – A link should go to the article-level for the electronic full text, not the table of contents or the journal home page.
- Library holdings (via the local OPAC) – The link should go either directly to the OPAC Holdings display (if supported) or to the corresponding bibliographic record, preferably with holdings/location information displayed. The link should not go to the general catalog page.
- Document delivery service – This service should pre-populate the form with citation information for users.

## NISC (BiblioLine)

- Parser: DEFAULT
- More information about NISC products can be found at:

[http://www.nisc.com/Frame/NISC\\_products-f.htm](http://www.nisc.com/Frame/NISC_products-f.htm)

NISC provides full-text linking capabilities for the BiblioLine bibliographic databases to which you subscribe. Complete the online survey at:

<http://www.nisc.com/Frame/news-f.htm>

or write to the following address and a NISC representative will contact you to discuss implementation:

[sales@nisc.com](mailto:sales@nisc.com)

- The following information needs to be sent to NISC:
  - base URL
  - Image URL (if it is there)
- List of metatags used:

The NISC OpenURLs include the following elements:

  - sid
  - genre
  - aulast
  - atitle
  - title
  - date
  - volume
  - issue
  - spage
  - epage
  - aufirst
  - aulast

## OCLC FirstSearch

- Parser: `DEFAULT`
- Contact details:

Direct your support questions to your regional network  
<http://www.oclc.org/contacts/>  
or telephone support: 1-800-848-5800  
or consult the OCLC web site at:  
<http://www.oclc.org/support/>  
or e-mail support:  
[support@oclc.org](mailto:support@oclc.org)  
or complete the Web support form at:  
[http://purl.oclc.org/oclc/support\\_form](http://purl.oclc.org/oclc/support_form)

- **Status:**  
OpenURL-aware (Y/N)? Y  
Released in production system - 15th October 2001
- **Location of the SFX button:**  
Vendors store the SFX gif on their own server, but allow for this to be changed by the customer.
- **Procedure:**  
The FirstSearch Admin module allows the library to set up a link to the OpenURL server. The library can input text to appear on the link in the interface and can input an icon that will appear with the link. The library may opt to use the icon, the text link, or both together.

---

**NOTES:**

- If no text is entered in the Link text box, the base URL of the library is displayed in the FirstSearch user interface. Because of this, it is best to fill in a text of your choice or enter a few spaces in the Link text box.
  - The icon defined in the FirstSearch user interface is smaller than the standard SFX button. To improve the look of the SFX button in FirstSearch, we have created a smaller gif, which can be used instead of the default SFX button. If you want to use this smaller button, add an alias for the gif in the `local_httpd.config` on your SFX server.
- 

**To add an alias for the gif on your SFX server:**

- 1 Telnet to the SFX server and log on as `sfxlcl41`.
- 2 Type `cn`.
- 3 Type `vi local_httpd.config` and add the following line (make sure there are no line breaks in this line):

```
Alias /<instance_name>/sfx_firstsearch.gif /  
exlibris/sfx_ver/sfx4_1/<instance_name>/templates/  
img/sfxmenu/sfx_firstsearch.gif
```

- 4 Type `:wq` to save the changes.
- 5 Restart the Apache demon for the instance. To do this, go to the following directory (you can type `da` at the UNIX prompt to go there):  
`/exlibris/sfx_ver/sfx4_1/<instance>/admin`
- 6 Type `./server_admin_util`.
- 7 Select **1** and then **8** (**1** is to Start/Stop services and **8** is to restart Apache for the instance).

- 8 Check whether you can see the FirstSearch gif. Go to:  
`http://servername:port/sfx_instance/sfx_firstsearch.gif`
- 9 Specify this gif in the administrative module in the **Icon File URL** field:  
`http://servername:port/sfx_instance/sfx_firstsearch.gif`

The FirstSearch Admin module allows the library to enable this feature database by database. For example, a library may not want to provide links to its OpenURL server from certain databases such as the phone databases or NetFirst, depending upon the configuration of its OpenURL server.

## Ovid

- Parser: OVID.pm
- Contact details:  
Diana Bittern  
(646) 674-6440  
[dianab@ovid.com](mailto:dianab@ovid.com)
- Status:  
OpenURL-aware (Y/N)? Y
- Location of the SFX button:  
Vendor allows you to specify a custom SFX gif.
- Procedure:
  - SFX links are identified with the user via an OpenLinks button, not an SFX button, except by agreement with Ovid.
  - Sites should contact Diana Bittern, Product Manager ([Diana\\_Bittern@ovid.com](mailto:Diana_Bittern@ovid.com)) or their local Ovid sales representative.

## Primo

- Parser: primo.pm
- Contact/Questions: Primo Interoperability Guide
- Status: OpenURL aware (Y/N)? Y

## ProQuest

- Parser: PROQUEST.pm
- Contact details:

Contact information for ProQuest can be found at:  
<http://training.proquest.com/trc/techsupport/liveassist.htm>

Most customers should not need to contact ProQuest prior to setting it up as a source.
- Status:

OpenURL-aware (Y/N)? Y
- Location of the SFX button:

Vendors allow you to specify a custom SFX gif.
- Information:

Libraries need an administrator account on ProQuest to administer their holdings options to set up the OpenURL generation. The SFX button is available only from the full record display or when the user clicks the Holdings logo on the brief results screen.

For testing, the site should turn on the OpenURL generation for only a few low-use journal titles and test with these. This is not ideal, but keep in mind that holdings can be turned on and off on the fly.

After the test phase, libraries can set the OpenURL to work for all titles across all databases to which they subscribe.
- Procedure:
  - 1 Log on to the local administrator account.
  - 2 Click **CrossLinks & Holdings**. The Library Holdings page is displayed.

If this page is not displayed, contact ProQuest online customer service for assistance with the library holdings setup.
  - 3 In the **Electronic Resources - ProQuest Defined** section, click the service you want to link to – for example, SFX. The Settings - Edit page for SFX is displayed.
  - 4 Select the check boxes on this page for both ProQuest Titles and Research Collections to apply the link to all available titles.
  - 5 Enter the required metadata values. You must enter a value for **URL to local SFX server metadata** for SFX setup.
  - 6 Optionally, select the **Display SFX icon on Results Page** check box. Note that the results set icon can be activated for only one resource. Once it is enabled on one resource, the other resources do not show the option.

- 7 Click **Apply Changes**. The Library Holdings File-Maintenance page refreshes, listing the collections to which the link has been applied.
- 8 Click **Library Holdings Menu** to return to the main page.
- 9 Log on to ProQuest to verify that the links are displayed.
- 10 If you do not see the links, or if you have any questions, contact ProQuest technical support.

**NOTE:**

The icon defined in the ProQuest user interface is larger than the standard SFX button. To improve the look of the SFX button in ProQuest, we have created a larger gif that can be used instead of the default SFX button.

**To use the larger button:**

- 1 Add an alias for this gif in the `local_httpd.config` file on the SFX server.
  - a Telnet to the SFX server and log on as `<instance>` (Example: `sfx1c141`)
  - b Type `cn`.
  - c Type `vi local_httpd.config`, and add the following line (make sure there are no line breaks in this line):

```
Alias /<instance>/sfx_proquest.gif /exlibris/sfx_ver/
sfx4_1/<instance>/templates/img/sfxmenu/
sfx_proquest.gif
```

- d Type `:wq` to save the changes.
  - e Restart the Apache daemon for the instance.  
Go to the following directory (you can type `da` at the UNIX prompt to get there):  
`/exlibris/sfx_ver/sfx4_1/<instance>/admin`  
type `./server_admin_util`  
Select **1 and** then **8**. (**1** is to Start and Stop services and **8** is to restart Apache for the instance.)
  - f Check whether you can see the ProQuest gif:  
[http://servername:port/sfx\\_local/sfx\\_proquest.gif](http://servername:port/sfx_local/sfx_proquest.gif)
- 2 Specify this gif in the **Icon URL** field of the ProQuest CrossLinks:  
[http://servername:port/sfx\\_instance/sfx\\_proquest.gif](http://servername:port/sfx_instance/sfx_proquest.gif)

## RefWorks

- Parser: DEFAULT

- Procedure:

To configure RefWorks to work with SFX, set the Open URL Provider link in the RefWorks administrative interface and link the URL to the SFX button.

More information on setting this up can be found at: [http://www.refworks.com/Refworks/help/Administrator\\_Tool.htm#Open\\_URL](http://www.refworks.com/Refworks/help/Administrator_Tool.htm#Open_URL)

## R.R. Bowker - ulrichsweb.com

- Parser: ULRICHS.pm

- Contact details:

Technical Support Group

R.R. Bowker LLC

630 Central Avenue

New Providence, NJ 07974 USA

(+1) 908-286-1090 ext. 104030 (worldwide tel)

(+1) 800-323-3288 (toll-free US and Canada tel)

(+1) 908-219-0195 (worldwide fax)

[techsupport@bowker.com](mailto:techsupport@bowker.com) (e-mail)

<http://www.ulrichsweb.com>

- Status:

OpenURL-aware (Y/N)? Y

- Procedure:

To set up SFX linking functionality in ulrichsweb.com, you may either set up the linking yourself or contact Bowker technical support for assistance.

- Setting up SFX linking in ulrichsweb.com is very quick and simple. The ulrichsweb.com site administrator for the ulrichsweb.com account may set up linking in the My Account of ulrichsweb.com. The site administrator should click on the **My Account** button on the ulrichsweb.com main navigation bar. On the My Account screen, there is a hypertext link entitled **Linking ulrichsweb.com to Your Library's Local Resources**. Clicking the link opens a detailed document that provides information about how to set up content-sensitive linking for



SFX. The setup process takes about one minute, and the linking functionality may be used immediately.

- For those who would prefer assistance with setting up their SFX linking, the contact information for Bowker technical support is listed in the **Contact details** section above. Any issues related to the functionality of [ulrichsweb.com](http://ulrichsweb.com) should also be directed to Bowker technical support.

Ulrichsweb allows customers to specify a custom text or use the standard SFX button. It is not possible to specify a custom SFX button.

However, it is possible in the administrative interface to use HTML syntax in the text field and to specify the location of the custom SFX button in this fashion (a restriction is that the text field cannot exceed 50 characters).

The following is an example of such information in the Ulrichsweb text field:

```
<img src=http://www.lib.uiowa.edu/u.gif border=0>
```

## SilverPlatter

- Parser: DEFAULT
- Main contact details:
  - SilverPlatter technical support services  
[support@ovid.com](mailto:support@ovid.com)
  - Pedja Pavlicic  
Technology Products Manager  
Merlin House  
20 Belmont Terrace  
Chiswick  
London W4 5UG  
Tel: +44 208 585 6400  
[ppavlicic@ovid.com](mailto:ppavlicic@ovid.com)
- Status:
  - OpenURL-aware (Y/N)? Yes
  - SilverPlatter is OpenURL-enabled in ERL 5 and later.

- Procedure:

Customers who want SFX links should contact SilverPlatter's technical support services at [support@ovid.com](mailto:support@ovid.com).

SilverPlatter customers can set up the OpenURL-enabled version of their databases themselves in the LinkWizard portion of the SilverPlatter WebAdmin utility.

Information can be found at <http://www.silverplatter.com/support/docs/index.html> and <ftp://ftp.silverplatter.com/software/erl-server/solaris/linkwizard.pdf>

In the Link Editor part of the Link Wizard, fill in the following URL template (replace the first line with your own server and instance names):

```
http://sfx.uni.edu:9003/sfx_local?sid=SilverPlatter:<spdata
type="value">@DBID</spdata>&isbn=<spdata type="listitem"
listitem="1">$ISBN</spdata>&atitle=<spdata
type="value">$TITL</spdata>&title=<spdata
type="value">$JOUR</spdata>&issn=<spdata type="listitem"
listitem="1">$ISSN</spdata>&date=<spdata
type="value">$YEAR</spdata>&volume=<spdata
type="value">$VOL</spdata>&issue=<spdata
type="value">$ISSU</spdata>&spage=<spdata
type="value">$PAG1</spdata>&pid=%3CAN%3E<spdata
type="value">$ACNO</spdata>%3C/
AN%3E%3CAU%3E<spdata type="value">$AUTS</
spdata>%3C/AU%3E
```

---

#### NOTES:

You need to use this URL template to make sure that the elements in the pid of the OpenURL are sent in a specific format that can be interpreted by the SilverPlatter source parser on your SFX server. The following information is currently sent in the pid:

- Author information
  - Accession number (important for EDRS and e\*Subscribe targets)
- 

In the **Prompt** field on the same page, you can either specify the link text that is displayed or the location of your SFX gif by using the following text string:

```
<![CDATA[<img src= http://sfx.uni.edu:9003/sfxlcl41/
sfx.gif>]]>
```

**NOTES:**

- If you go back into the configuration, you will see that it renders it differently. Do not try to edit this rendered version. Instead, you need to paste in the CDATA string again.
  - There is a 60-character limit on the Prompt field. If the original link text to your custom gif exceeds this limit, try to put the custom gif somewhere else on your server so that the URL appears to be shorter.
- 

Alternatively, a technical support representative will set up the OpenURL. Make sure the same recommended URL template is used.

## SwetsNet

- Parser: DEFAULT
- Main contact details:  
Wietze Brattinga  
Swets Information Services  
[wbrattinga@nl.swetsblackwell.com](mailto:wbrattinga@nl.swetsblackwell.com)  
Tel. +31 252 435663
- Status:  
OpenURL-aware (Y/N)? Y  
Available since February 2001.  
Uses user profiles to determine the base URL of the OpenURL. Fields available on the OpenURL are:
  - ISSN
  - Volume
  - Issue
  - Page numberSwetsNet expects to expand this in a future release.
- Location of the SFX button:  
Vendors store the SFX gif on their own servers.

- Procedure:

- 1 Contact your SwetsNet technical/sales support representative about the fact that you have an SFX server and want to use the OpenURL-enabled version of Swetsnet.

Our contact person at SwetsNet is Gertrude Hoogendoorn. If your technical/sales support representative has questions, he/she should contact her.

- 2 Emphasize that you want the OpenURL-enabled access account to be restricted to a very limited set of users while configuring your SFX installation, and no full text access is required for this (extra) SwetsNet account.

- 3 Send SwetsNet the base URL that they need to insert in the OpenURL:

[http://servername:port/sfx\\_instance](http://servername:port/sfx_instance)

This is the name of the SFX server, port number, and SFX database.

## ZETOC

- Parser: DEFAULT

- Main contact details:

Zetoc helpline:

[zetoc@mimas.ac.uk](mailto:zetoc@mimas.ac.uk)

- Documentation:

Information can be found in the Zetoc FAQ at <http://zetoc.mimas.ac.uk/faq.html> under **Obtaining Articles/Papers** and at <http://zetoc.mimas.ac.uk/fullhelp.html>

- Status:

OpenURL-aware (Y/N)? Y

OpenURL information:

- sid=mimas:zetoc

- no pid

- Zetoc contains records of journal articles (genre=article) and conference papers (genre=proceeding).

The OpenURL contains the following metadata for each type:

- Article

- title (journal title)

- ISSN

- date (publication year)
- volume
- part (this includes whatever you have after volume, such as issue, part, and so forth)
- spage
- epage
- atitle (article title)
- aulast (first author's surname)
- auinit (first author's initials)
- Paper
  - title (if the paper is in a journal, this is the journal title; if it is not, it is the proceedings title)
  - ISSN (will be null if not in a journal),
  - ISBN (may be multiple)
  - date (publication year)
  - volume
  - part (as above if in a journal, null otherwise)
  - spage
  - epage (if you have it)
  - atitle (article title)
  - aulast (first author's surname)
  - auinit (first author's initials).
- SFX button:

There is no SFX button. The link the user sees is **More Information**.
- Procedure:

Customers need to send their base URL to the Zetoc helpline at:  
[zetoc@mimas.ac.uk](mailto:zetoc@mimas.ac.uk)  
[http://servername:port/sfx\\_instance](http://servername:port/sfx_instance)

They also need to supply their three-letter institution Athens identifier.



# A

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## Configuring Bi-Directional Links

This appendix includes instructions for library administrators on setting up bi-directional links between library SFX servers and EBSCOhost.

This section includes:

- **Introduction** on page 71
- **Setting Up Links from EBSCOhost to the Library SFX Server** on page 72
- **Setting Up Links from the Library SFX Server to EBSCOhost** on page 73

### Introduction

SFX is a linking technology that permits context-sensitive linking between various Web resources and allows libraries to combine electronic resources to function as a cohesive, one-stop reference system. Such resources include full text, abstracting, indexing and citation databases, online library catalogs, interlibrary loan and document delivery systems, search engines, and other Web resources.

EBSCOhost is currently SFX-enabled and EBSCOhost customers who purchase SFX are able to configure their systems to allow SFX links to be embedded into EBSCOhost search results. They can also link from their library SFX linking server to full text on EBSCO Online or in EBSCOhost databases. EBSCO has implemented true bi-directional linking with SFX.

The following sections outline the steps for library administrators to follow in order to enable bi-directional links between EBSCOhost and their SFX server.

## Setting Up Links from EBSCOhost to the Library SFX Server

### Setting Up Links With EBSCO

Library administrators should contact EBSCO Publishing technical support either by sending an e-mail to [epteche@pnet.com](mailto:epteche@pnet.com) or calling (800) 758-5995 and notifying EBSCO Publishing technical support that they have an SFX server installed and would like to enable a link from EBSCOhost databases to their SFX server. Library administrators should provide EP tech support with the following information:

- The base URL for the library's SFX server (base URL is unique for each library customer): [http://servername:port/sfx\\_local](http://servername:port/sfx_local). This is the name of the library's SFX server, port number, and SFX database.
- The EBSCOhost profile that will have SFX activated.
- The IP address/IP range of the computers to test in order to make sure that the OpenURL access is restricted to this IP address/IP range. Another option is a logon/password for the testing period.

Upon receipt of the above information, EBSCO Publishing technical support is able to set up an ILS link from EBSCOhost databases to the library's SFX server.

### Setting Up Links Directly

Alternatively, library administrators can directly set up links to an SFX server by entering the following information in the Advanced screen of EBSCOAdmin:

- Base URL:<http://servername:port/sfxlc1><sup>41</sup> (unique for each library customer)
- URL mask:  
[?genre=article&issn={ISSN}&title={JOURNAL}&volume={VOLUME}&issue={ISSUE}&date={DATE}&atitle={TITLE}&spage={STRTPAGE}&sid=EBSCO:{dbCode}&pid=<authors>{AUTHORS}</authors>](http://servername:port/sfxlc1?genre=article&issn={ISSN}&title={JOURNAL}&volume={VOLUME}&issue={ISSUE}&date={DATE}&atitle={TITLE}&spage={STRTPAGE}&sid=EBSCO:{dbCode}&pid=<authors>{AUTHORS}</authors>)
- Mandatory fields – JOURNAL  
Window properties – change the window parameters to: window name = SFXmenulocation = nostatus = yesmenubar = noscrollbar = yesresizable = yeswidth = 460height = 420
- Link text – SFX LINK MENU
- Link icon – <http://servername:port/sfxlc1/sfx.gif> (unique for each library customer)
- Mouse over text – Check SFX for a menu of link options for this item. A new window is displayed.
- Display in new window – Yes



- Window name – SFX menu
- Show on result list – determined by a library customer
- Hide link if full text – No
- Show if – if an item is in the local collection, if an item is not in the local collection, always (determined by a library customer)
- Local collection for filter – (determined by a library customer)

### Z39.50 Fetch (Optional)

Z39.50 access to the EBSCOHost databases can be used by SFX to fetch additional metadata to augment the metadata received through the OpenURL.

The library administrator should contact EBSCO Publishing tech support to receive a Z39.50 user name and password for the EBSCOhost server. This Z39.50 user name/password needs to be entered in the local source configuration file on the SFX server.

## Setting Up Links from the Library SFX Server to EBSCOhost

EBSCO Publishing allows bi-directional linking with SFX. The library administrator can request to set up a link from the library SFX server to the EBSCOhost databases that allow access to EBSCOhost full text databases as well as EBSCO Online electronic content. Library administrators should provide SFX with the following information:

- EBSCOhost log on information:
  - userID for the profile to be used in the form of <custID>.<groupID>.<profileID>
  - Where:
    - <custID> = your EBSCOhost customerID... for example, S00000
    - <groupID> = the identifier for the group the profile is under... for example, main
    - <profileID> = the identifier for the profile... for example, WebIn the above example, the EBSCOhost logon information would be S00000.main.web
- EBSCO online logon information:
  - custID, userID

Table 1. Sources

Source Name	Source Parser	Parser Name	Description Parser	Fetch	Fetch Info Required?	Pid Parsing	Ignore Date Thresholds
ABC_CLIO	N		N/A	N		N	N
AMS_MATHSCINET	N		N/A	N		N	N
BIOMED_CENTRAL	N		N/A	N		N	N
DIALOG_AT_SITE	N		N/A	N		N	N
EI_VILLAGE	N		N/A	N		N	N
ELSEVIER	N		N/A	N		N	N
GALEGROUP_INFOTRAC	N		N/A	N		N	N
HLAS	N		N/A	N		N	N
INSTITUTE_OF_PHYSICS_JOURNALS	N		N/A	N		N	N
JSTOR	N		N/A	N		N	N
NISC_BIBLIOLINE	N		N/A	N		N	N
OVID	N		N/A	N		N	N
RLG	N		N/A	N		N	N
WILSONWEB	N		N/A	N		N	N
ZETOC	N		N/A	N		N	N
ARXIV	Y	oai.pm	Fetch metadata based on global identifier oai	HTTP		N	N
BOWKER_ULRICHSWEB	Y	ULRICHS .pm	Ignore date thresholds	N		N	Y
CAMBRIDGE_SCIENTIFIC_ABSTRACTS	Y	CSA.pm	Parse pid elements: ERIC ED and EJ numbers, Publisher and Report nr.	N		Y	N

Table 1. Sources

Source Name	Source Parser	Parser Name	Description Parser	Fetch	Fetch Info Required?	Pid Parsing	Ignore Date Thresholds
CHEMICAL_ABSTRACTS_SERVICE	Y	CAS.pm	Parse pid element: Author Names	N		Y	N
EBSCO	Y	EBSCO.pm	Parse pid elements: Authors, + Fetch additional metadata in MARC record using recID	HTTP	X	Y	N
ENDEAVOR_VOYAGER	Y	VOYAGER.pm	Ignore date thresholds	N		Y	Y
EX_LIBRIS_ALEPH	Y	ALEPH.pm	Fetch additional metadata in MARC record using recID	Z3950	X	Y	Partial
FAMILY_SCHOLAR_PUBLICATIONS	Y	FAMILY.pm	Parse pid element: Author Names	N		Y	N
III_INNOPAC	Y	INOV.pm	Fetch additional metadata in MARC record using ISSN/ ISBN	Z3950	X	Y	Y
INSTITUTE_OF_PHYSICS_AXIOM	Y	axiom.pm	Parse pid elements: patNum, patentee, patYear	N		Y	N
METALIB	Y	metalib.pm	Fetch additional metadata in MARC record using recID	HTTP	X	Y	N

Table 1. Sources

Source Name	Source Parser	Parser Name	Description Parser	Fetch	Fetch Info Required?	Pid Parsing	Ignore Date Thresholds
METALIB (OPAC sources)	Y	metalib_opac.pm	Ignore date thresholds	HTTP	X	Y	Y
NCBI_PUBMED	Y	pmid.pm	Fetch metadata based on global identifier pmid	HTTP		N	N
OCLC_FIRSTSEARCH	Y	FirstSearch.pm	Parse pid elements: ERIC ED and EJ numbers, Edition	N		Y	Partial
PROQUEST	Y	PROQUEST.pm	Parse pid element: Author Names	N		Y	N
SFX_CITATION_LINKER	Y	CITATION.pm	Ignore date thresholds	N		N	Y
SFX_EJOURNAL_LIST	Y	ECOLLECTION.pm	Ignore date thresholds + parse pid 'ServiceType' for DirectLink purposes	N		Y	Y
SILVERPLATTER	Y	SilverPlatter.pm	Parse pid elements: ERIC ED and EJ numbers, Authors	N		Y	N
SWETS	Y	SWETS.pm	Ignore date thresholds if objectType is 'journal'	N		N	Y
WEB_OF_SCIENCE	Y	WOS.pm	Exceptional parsing of certain AIP journals	N		N	N

Table 1. Sources

Source Name	Source Parser	Parser Name	Description Parser	Fetch	Fetch Info Required?	Pid Parsing	Ignore Date Thresholds
INTERNAL: DOI	Y	doi.pm	Fetch metadata based on global identifier doi	Y	X	N	N

