LinkWizard™ User's Guide

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SilverPlatter Information, Inc. SilverPlatter Information, Ltd.

100 River Ridge Drive Merlin House, 20 Belmont Terrace

Norwood, MA 02062-5026, USA Chiswick, London, W4 5UG, England

TEL: 781-769-2599 TEL: +44 (0) 20-8585-6400

FAX: 781-769-8763 FAX: +44 (0) 20-8585-6640

Web site: www.silverplatter.com

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Preface

This manual explains how to create and edit LinkWizard™ links.

Using this manual

This Manual is available in PDF format so you can view it in Adobe Acrobat Reader. You can print the document, or use it online. If you use it online you can click on a Table of Contents entry, or a cross-reference, to move to the relevant text.

This document is also available from the Technical Support area of the SilverPlatter web site at http://www.silverplatter.com.

Some conventions used in this manual

These are the conventions used throughout this manual.

Example	Describes
/sproot/bin	This bold type indicates a filename, or a directory path, or a URL.
	Where the instructions are specific to an installation on Windows, a directory path is shown with backslashes: \sproot\cfiles. Where the instructions are specific to UNIX, the directory path has forward slashes: /sproot/bin.
	In cases where the action is the same on either platform, you must enter slashes in the format appropriate for your platform.
pkgadd	This typeface indicates text as you would type it, or an example of how it appears on the screen.
filename	This bold type indicates a placeholder, when included in something you type. You substitute the text appropriate to your system.
filename	This italic type indicates a placeholder, when described in the text.
root	This italic type indicates an account name.
File	This bold type indicates a menu, menu option, or the name of a button on the screen.
	It is also used for command names.
[Enter]	This bold type inside [and] indicates a key on your keyboard. Note: if the instructions say "Enter" this means type in the text as instructed, (substituting your text for any placeholders) and press the [Enter] key.

Chapter 1 Overview

LinkWizard™ Overview

LinkWizardTM links are a major new feature of ERL Server 5. LinkWizardTM lets you link to virtually any resource on the Internet based on the information within databases. This is particularly useful for resources that are not as clearly defined as electronic journal articles.

There are three different types of LinkWizardTM links:

Web links to holdings For links to local or remote library

holdings. See Chapter 4, "Web Links to Holdings" for further details.

Order this item For document delivery links. See

Chapter 5, "Creating Links to Document Delivery Resources" for

further details.

Internet links For links to any other sites related to

the record. See Chapter 6, "Creating

Links to Internet Resources" for

further details.

LinkWizardTM links can be broken down into the following three pieces of information:

- 1. A URL template that contains placeholders for information (and derived information) taken from a database record.
- 2. A set of conditions, based on record data, that determine whether the link should be displayed or not for the record. For example, a holdings link might not be displayed if a full text link were present in a record.

3. A field in which the link will be displayed. LinkWizard™ links are displayed as clickable links in SPIRS clients.

URL Templates

URL templates provide tremendous scope for customizing links. A URL template definition contains placeholders for record data. Placeholders can be any field in a record.

Display Conditions

Administrators can specify when LinkWizardTM links are displayed. There are a number of ways that this can be achieved, using the data associated with the link configuration template:

Display condition	Description
Show link for these databases:	Links only show records from the selected databases.
Don't show link for these databases:	Links do not show records from the selected databases.
Show link only if these metadata fields are present in the record:	Links only show records that contain selected metadata fields.
Show link only if these metadata fields are not present in the record:	Links only show records that don't contain selected metadata fields.
Show link only if these fields are present in the record:	Links only show records that contain the selected fields.
Show link only if these fields are not present in the record:	Links only show records that don't contain the selected fields.

Display Fields

LinkWizard™ links are displayed in the SPIRS client using the following fields:

- WEBLH for web links to holdings
- ORDER for document delivery (Order This Item)
- ILINK for related internet links

Configuring Links

Administrators can configure links either using the WebAdmin tool to produce the XML configuration files or by editing the file by hand. We strongly recommend the use of the WebAdmin tool because the files must adhere to a strict DTD and the validation is done automatically by a parser. Chapter 3, "WebAdmin" describes how to use the WebAdmin tool to configure links.

Metadata

LinkWizardTM makes extensive use of metadata.

SilverPlatter is issuing metadata-enabling files with our databases. This lets ERL 5.0 produce non database-specific fields. For example, if you want an ISSN, normally you have to check the IS, ISSN, SN, and possibly even SO fields. With metadata, you simply request \$ISSN. This is useful for creating links that need to work across several databases.

There are times when the metadata does not cover everything in the bibliographic record, however, so you still need to use bare fields from the record. This is still possible for LinkWizardTM, but in these cases we recommend that you use **Display Conditions** to show LinkWizardTM links only for those databases that are known to have compliant field names

Note: There are a number of points to note when using metadata for LinkWizardTM.

- 1. If you use metadata, you do not see links for non-enabled databases.
- 2. Not all metadata-enabled databases support all metadata elements.
- 3. The metadata fields do not necessarily have a uniform format, so, for example, an author field (\$AUTH) from one database may have a different format for first initial and surname than one from another database, even though the field name is the same for both.

Chapter 2 Before Using LinkWizardTM

Which LinkWizard™ Links are Available?

All Users

From ERL 5.03 all users have access to (if configured) one Web Link to Holdings (WEBLH) link and one Document Delivery (ORDER) link. These links are called FreeLinks. Users can create and edit (if authorized) as many links as they like but can only enable one WEBLH and one ORDER at any one time.

LinkWizard™ Authorized Users

To use LinkWizardTM Internet Links (ILINK) or to use more than one Web Link to Holdings (WEBLH) link and one Document Delivery (ORDER) link you must mount and license a LinkWizardTM database.

Administrating Links

Administrators can configure links at both a global (All Users) level and a user-specific level. FreeLinks configured at a user-specific level override links configured at a global level. Licensed LinkWizardTM database users see links configured at both the global and user-specific levels.

If an ERL Server has a LinkWizardTM database mounted and licensed for some users, FreeLinks must be configured at the user level for the users without authorization.

Transitions from or to LinkWizard™

When going from FreeLinks to LinkWizardTM by purchasing the database license, users will immediately be able to enable or re-enable all links they had previously configured, without needing to re-enter any information, since the links already reside in the **weblinks.xml** file.

If a LinkWizard[™] database subscription expires, users do not lose any of their links from WebAdmin but all links are disabled, and they can only choose one WEBLH link and one ORDER link to enable. If users had previously enabled FreeLinks (prior to purchasing LinkWizard[™]), any previously chosen links are remembered because the **freelinks.xml** file is not deleted.

Mounting and Licensing a LinkWizard™ Database

From ERL 5.03 onwards, you must mount and license a database before the LinkWizardTM Internet Links (ILINK) become available. The database volume ID is SLWZ, but appear in the command-line interface as #LWZ.

For more information about mounting and licensing databases see Chapter 4, "Managing Databases" in the *ERL Server Administrator's Manual.*

XML Files

weblinks.xml file The weblinks.xml file contains links, which are created and edited using

the WebAdmin tool.

freelinks.xml file The freelinks.xml file contains references to links in the normal

weblinks.xml file, using the link ID.

external.xml file The **external.xml** file, which contains the preset links (as denoted by a

padlock in WebAdmin), is updated via this database. The file is shipped as part of the database, and copied into /sproot/cfiles when the database

is first mounted.

Note: The **external.xml** file is only copied if the database is newer than any SLWZ database already installed on the system.

In versions prior to ERL 5.03, the **external.xml** file shipped with the server had placeholders for the LPA server name, which were filled in during the software installation process. In ERL 5.03 and later there are two new "pseudo-elements" available for substitution into the URL using spdata> tags: @LPASERVER and @LPAPORT. These are now specified in the **external.xml** file and filled in by the LinkWizardTM software as the links are produced. This means that the **external.xml** file is now fully portable across servers and does not need further modification to install.

The values of @LPASERVER and @LPAPORT are calculated at install time, as before, but are placed into the **erlsrvr.cfg** file as weblink.lpaserver and weblink.lpaport respectively. These values default to the Apache server installed with the software.

As options in the **erlsrvr.cfg** file it is easier to change them when changing server name or if the LPA scripts are moved to a different web server.

Important: The values of weblink.lpaserver and weblink.lpaport must be set in the **erlsrvr.cfg** file for LinkWizardTM to function correctly.

Chapter 3 WebAdmin

Overview

What is it?

WebAdmin is a web-based administration tool that assists administrators to manage their ERL Server systems. Administration can be done from any location using any workstation supporting a browser, and does not require a dedicated device.

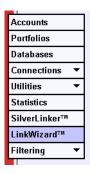
Accessing WebAdmin

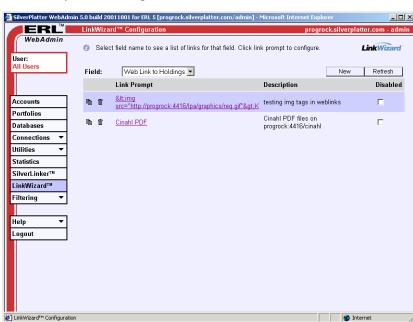
To access WebAdmin:

- 1. Entering the following URL in your browser:
 - http://server_name:4416/webadmin/
- 2. Enter the Account Name and Password and click Login.

Selecting LinkWizard™

WebAdmin Menu > LinkWizardTM





Use the main LinkWizard[™] Configuration page to view the existing links you have set up. You can select links to edit, or create new ones.

Selecting the type of links you want to work with

- Select a type of link from the **Field:** drop-down menu:
 - Web link to holdings for links to local or remote library holdings
 - Order this Item for document delivery links
 - Internet Links for links to any other sites related to the record

This displays a list of existing links for that field, in three columns:

- Link Prompt (the prompt users see in their bibliographic records)
- Description (text that only appears in WebAdmin, to help you identify the link.)
- Disabled (whether or not the link is currently in use). All new links are disabled when you first create them: you must enable them manually.

A link is in one of two states:

- If it is a link you can edit it.
- If it is text with a padlock, it is a SilverPlatter preset link and cannot be edited, even by an administrator. You can choose whether to enable it or not.

Editing a link Click on any link that is shown as a link, to access the Link Editor.

Creating a new linkClick **New** and enter details in the Link Editor. If you are not the only person in your organization to be editing the same set of links, click

Refresh to update the list.

Click next to the link that you want to copy. WebAdmin creates a copy

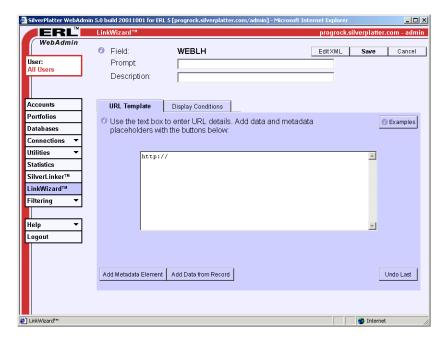
of the link.

Deleting a linkClick next to the link that you want to delete, and confirm the deletion.

WebAdmin deletes the link.

The Link Editor

You access the Link Editor when you click on an existing link or you create a link.



The Link Editor has three parts:

- The top area, where you enter information about the link
- The URL Template area, where you create the URL template.
- The Display Conditions area, where you can set the display conditions for the links.

The top area shows the type of field you are working with. You can enter or edit the **Link Prompt** text (the words users see in the bibliographic records) and enter a **Description** for the link, to help you identify it when you look at your list of links in WebAdmin.

Using the Link Editor

Make your settings in the top area.

- 2. Create the URL template.
- 3. Configure the display conditions if necessary.
- 4. Click **Save** to create the link.
- 5. Enable your link by unclicking the **Disabled** check box next to the link.

Chapter 4 Web Links to Holdings

Introduction

Web Links to Holdings provides links to:

- web-based library catalogue OPACS
- local, national, and union OPACs (e.g., COPAC).

Note: If you are not authorized to use the LinkWizardTM database you only have access to one Web Links to Holdings (WEBLH) link.

Creating/Editing a URL Template for Web Links to Holdings

WebAdmin Menu > LinkWizard TM > Field menu > Web Link to Holdings > New

WebAdmin Menu > LinkWizard™ > Field menu > Web Link to Holdings [link name] > URL Template

Use the **URL Template** area to edit or create the URL to use for links that are Web Links to Holdings. If you are confident editing XML, click **XML Editor** to create the URL manually.

To create a link URL:

- 1. Start typing the URL into the box, until you reach a point where you need to substitute a piece of bibliographic data.
- 2. Decide whether the item is metadata or field data.

- Click Add Metadata Element or Add Data from Record as appropriate.
- 4. Enter information for that data item. Click **Add to URL** to return to this page, where you see the data item added to the URL.
- 5. Continue to enter the rest of the URL.
- 6. Click **Display Conditions** to check the conditions. (These are set automatically, based on the data elements you select, but you might want to edit them.)
- 7. Click **Save** to save the new or edited link details.

Example Web Links to Holdings

This example explains how to set up a link to PDF files in the Cinahl database.

- Select the Web Link to Holdings field from the LinkWizardTM Configuration page and click New.
- 2. In the Link Editor, fill in the **Prompt:** Cinahl PDF.
- Fill in a description if you want to. (This can be a useful way of reminding yourself of the purpose of the link.)

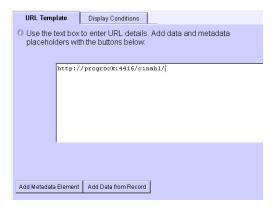


4. Configure your web server to link to the Cinahl PDF files. To do this add an "Alias" line, which points to the directory where the PDF files reside, to the Apache httpd.conf file. for example:

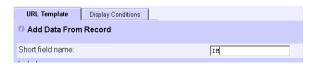
Alias /cinahl "/databases/NUD6/images"

5. Enter information into the URL template field.

http://servername:4416/cinahl/



- 6. Now you need to add the field value for the IM image, which contains the PDF file name(s). Click on **Add Data From Record**.
- 7. Type IM at **Short field name:** and leave the other settings as set.



8. Click **Add to URL** to return to the Link Editor.

The URL template now looks like this:



9. Click Save.

- 10. Back in the LinkWizardTM List, the new link appears in the list, with the **Disabled** box checked. Click on the box to remove the check and enable the link.
- 11. Check the link by logging onto a client and doing a search, to see if the links appear.

Further Examples

1. This example creates web links to the UK Academic Union Catalogue (COPAC).

URL template:

```
<url>http://copac.ac.uk/cgi-
bin/cgiwrap/copacw/wzgw?terms=<spdata
type="value">$ISSN</spdata>&field=isn</url>
```

XML generated for this template:

```
<incl operator="and"> <spdata
type="value">$ISSN</spdata>
</incl> <comment>UK University Union
Catalogue</comment> prompt>COPAC Union
Catalogue
```

2. This example creates web links to the Innovative Interfaces OPAC. This example is configured for metadata databases only.

URL template:

```
<url>http://www.iii.com:81/search/i?SEARCH=<s
pdata type="value">$ISSN</spdata></url>
```

XML generated for this template:

```
<incl operator="and"> <spdata
type="value">$ISSN</spdata>

</incl> <comment>Innovative
Interfaces</comment> Interfaces
```

Chapter 5 Creating Links to Document Delivery Resources

Introduction

Order this Item provides links to document delivery resources. Examples include:

- traditional article providers (e.g., British Library)
- online bookstores (e.g., Amazon)

Note: If you are not authorized to use the LinkWizardTM database you only have access to one Document Delivery (ORDER) link.

Creating/Editing a URL Template for "Order this Item"

WebAdmin Menu > LinkWizardTM > Field menu > Order this Item > New

WebAdmin Menu > LinkWizardTM

> Field menu > Order this Item [link name] > URL Template

Use the **URL Template** area to edit or create the URL to use for links that are document delivery links. If you are confident editing XML, click **XML Editor** to create the URL manually.

To create a link URL:

- 1. Start typing the URL into the box, until you reach a point where you need to substitute a piece of bibliographic data.
- 2. Decide whether the item is metadata or field data.
- Click Add Metadata Element or Add Data from Record as appropriate.
- 4. Enter information for that data item. Click **Add to URL** to return to this page, where you see the data item added to the URL.
- 5. Continue to enter the rest of the URL.
- 6. Click **Display Conditions** to check the conditions. (These are set automatically, based on the data elements you select, but you might want to edit them.)
- 7. Click **Save** to save the new or edited link details.
- 8. Back in the LinkWizardTM List, the new or edited link appears in the list, with the **Disabled** box checked. Click on the box to remove the check and enable the link.

Example Link to Document Delivery Resources

This example explains how to set up a link so that users can order items at an online book store.

If you work out the URL for the book store, you can use the information to set up the method that lets your users move swiftly from a link within a record to information on the book store site about how to obtain a copy of the item referenced in that record.

To find the URL information for a book site:

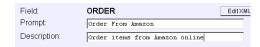
The book site Amazon.com (and many other book sites) allows searching for books by ISBN number.

Searching for a book where you know the ISBN number (such as ISBN 1-56592-494-0) gives the following URL (ignoring the session-specific information that appears after the ISBN number):

http://www.amazon.com/exec/obidos/ASIN/1565924940

To convert the URL to a link

- Select the Order this Item field from the LinkWizardTM Configuration page and click New.
- 2. In the Link Editor, fill in the **Prompt**: Order From Amazon.
- 3. Fill in a description if you want to. (This can be a useful way of reminding yourself of the purpose of the link.)



4. Enter information into the URL template field. Enter everything up to the point where the ISBN starts:

http://www.amazon.com/exec/obidos/ASIN/



Now you need to add a metadata element for ISBN. In this example
we assume all the databases your users use are metadata-enabled, so
click on Add Metadata Element.

Remember that you are adding a new metadata element each time you enter the **Add Metadata Element** section of the Link Editor. A single item can include three sections: the Metadata field, an Include value, and a Replace value.

You cannot edit existing metadata elements within the **Metadata** section. If you make a mistake, you must delete the entry in the URL Template (either manually, or using **Undo Last**) and click **Add Metadata Element** again.

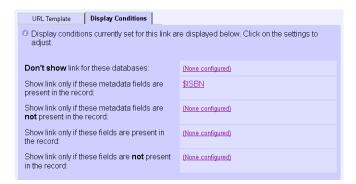
6. Select the ISBN_ALL metadata element from the drop-down menu at **Metadata Field:** and leave the other settings as set.

Click Add to URL to return to the Link Editor.

The URL template now looks like this:



8. Click **Display Conditions**. WebAdmin has entered the \$ISBN element in the second field. This means that the link "Order from Amazon" only appears in records that contain the metadata field "\$ISBN". In this example we are assuming all the databases (and thus, all the records) are metadata-enabled, so the link is valid for all databases and there are no records not caught by this condition. Therefore we do not need to make any other settings.



- Click Save.
- Back in the LinkWizardTM List, the new link appears in the list, with the **Disabled** box checked. Click on the box to remove the check and enable the link.
- 11. Check the link by logging onto a client and doing a search, to see if the links appear.

Note: This link might need some refinement.

Some databases contain ISBNs in their full form, with hyphens.
 In these cases, return to the Add Metadata Element section of the Link Editor, and tell WebAdmin to remove the hyphens.

Some databases have multiple ISBNs in the field. In these cases return to the Add Metadata Element section of the Link Editor. Select Include Single value from a list, and accept the option Which item in list: 1 to specify that you only want the first item in the list.

If you entered all three elements as one metadata element, the URL template would look like this:

```
http://www.amazon.com/exec/obidos/ASIN/<spdat
a type="listitem" > listitem="1"
replacetext="-" replacewith="">$ISBN</spdata>
```

This is the full XML generated for this template:

```
<incl operator="and"> <spdata
type="value">$ISBN</spdata></incl>
cprompt>Order From Amazon
<url>http://www.amazon.com/exec/obidos/ASIN/<
spdata type="listitem"> listitem="1"
replacetext="-"
replacewith="">$ISBN</spdata></url>
```

This is wrapped in link> tags in the configuration file.

Note: Although the URL has been put on multiple lines for readability, there must be no new line characters within the <url> tag.

Further Example

This example sends a request to BibSYS, a Scandinavian Document Delivery Service.

URL template:

```
<url>http://wgate.bibsys.no/search/cop?lang=E
&kild=WebSPIRS&publ=<spdata
type="value">$JOUR</spdata>&isbn=<spdata
type="value">$ISSN</spdata>&forf=<spdata
type="list"
outputsep=";">$AUTS</spdata>&titt=<spdata
type="value">$TITL</spdata>&aarr=<spdata
type="value">$YEAR</spdata>&volm=<spdata
type="value">$YEAR</spdata>&side=<spdata
type="value">$PAGS</spdata></url>
```

XML generated for this template:

```
<incl operator="and">
  <spdata type="value">$JOUR</spdata>
  <spdata type="value">$ISSN</spdata>
  <spdata type="value">$AUTS</spdata>
  <spdata type="value">$TITL</spdata>
  <spdata type="value">$YEAR</spdata>
  <spdata type="value">$YEAR</spdata>
  <spdata type="value">$YOL</spdata>
  <spdata type="value">$PAGS</spdata>
  </incl>
```

Chapter 6 Creating Links to Internet Resources

Introduction

Internet Links provide links to any web-based resource related to the record. Examples include:

- Subject gateways (e.g., EEVL)
- Pre-print archives (e.g., Los Alamos)
- Molecular structures
- Drug information (e.g.,MicroMEDEX)
- Search engines (e.g., Google)

Before Using Internet Links

To use internet links, you must mount and install a LinkWizardTM database. See Chapter 2, "Before Using LinkWizardTM" for further details.

Creating/Editing a URL Template for Internet Links

WebAdmin select LinkWizardTM > Field menu > Internet Links > New

WebAdmin Menu > LinkWizardTM > Field menu > Internet Links [link name] > URL Template

Use the **URL Template** area to edit or create the URL to use for links that are internet links. If you are confident editing XML, click **XML Editor** to create the URL manually.

To create a link URL:

- 1. Start typing the URL into the box, until you reach a point where you need to substitute a piece of bibliographic data.
- 2. Decide whether the item is metadata or field data.
- 3. Click Add Metadata Element or Add Data from Record as appropriate.
- 4. Enter information for that data item. Click **Add to URL** to return to this page, where you see the data item added to the URL.
- 5. Continue to enter the rest of the URL.
- 6. Click **Display Conditions** to check the conditions. (These are set automatically, based on the data elements you select, but you might want to edit them.)
- 7. Click **Save** to save the new or edited link details.
- 8. Back in the LinkWizardTM List, the new or edited link appears in the list, with the **Disabled** box checked. Click on the box to remove the check and enable the link.

Example Links to Related Internet Resources

These examples create links to related internet resources (ILINK).

1. This example uses Subject metadata and a Link Processing Application to link to the BIOME Subject Gateway.

URL template:

<url>http://yourERLserver.domain.edu:4416/lpa
scripts/expand.pl?lpa.url=http://biome.ac.uk/
search/search.html&hub=biome&is_simple=false&
query=\$\$LPATERMS&category=any&hublet=agrifor&
hublet=bioresearch&hublet=natural&hublet=omni
&hublet=vetgate&stemming=true&limit=10&maxrec
s=200&sort_by=title&lpa.title=Suggested+terms

```
+for+BIOME+look+up&lpa.terms=<spdata
type="list"outputsep=";;"replacetext="-"
replacewith=" ">$SUBT</spdata></url>
```

XML generated for this template:

2. This example uses Chemical Number metadata and the holding CAS number to the ChemFinder database of chemical structure information

URL template:

```
<url>http://yourERLserver.domain.edu:4416/lpa
scripts/expand.pl?lpa.url=http://www.chemfind
er.com/result.asp&polyQuery=$$LPATERMS&lpa.ti
tle=Suggested+CAS+numbers+for+structure+look-
up&lpa.terms=<spdata type="list"
outputsep=";;"replacetext="0;;"
replacewith="">$CHEM</spdata></url>
```

XML generated for this template:

```
<incl operator="and">
<spdata type="value">$CHEM</spdata>
</incl> <comment>Link to ChemFinder</comment>
prompt>Chemical structure
```

3. This example uses the descriptor field (DP) in the EconLit database to link to the pre-prints in the RePec archive.

URL template:

```
<url>http://ideas.uqam.ca/cgi-bin/repec/AT-
ideas4search.cgi?search=<spdata
type="value">DP</spdata></url>
```

XML generated for this template:

```
<incl operator="and">
```

Chapter 7 Hints and Tips

- It is often easier to copy and modify an existing LinkWizard™ link than to create one from scratch.
- If you want to use LinkWizardTM links across multiple databases it is a good idea to use metadata fields.
- More and more databases are being metadata enabled. It is a good idea to contact your database vendor regularly for updates.
- You can share LinkWizardTM links with other users. For example, you can copy the XML from the XML Editor in WebAdmin and paste it into a new link on a different server or into an email, etc.