MetaLib+ Configuration Guide

Version 1.0

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Overview of MetaLib+

MetaLib+ is a cloud-based Primo service that works with both local and hosted MetaLib sites. It is used for electronic material discovery, providing instant access to the Primo Central Index with its vast coverage of scholarly content. In addition, MetaLib+ continues to support searches in your MetaLib search targets. By offering both search methods, MetaLib+ significantly improves the discovery experience of scholars who are seeking electronic materials.

With MetaLib+ your users benefit from a superior experience in three major aspects of discovery:

- **Coverage** – The Primo Central Index, included with MetaLib+, covers the majority of content in most institutions' global e-collections and indexes the full text of many Primo Central (PC) materials as well.

- **Search performance** – Results from Primo Central are retrieved and displayed much faster than results retrieved through traditional meta-searching.

- **Ranking quality** – Sophisticated Primo relevance-ranking algorithms enable your users to find the items that they need among the first few results.

MetaLib+ is set up to search the Primo Central Index according to collections you define as well as search your institution's MetaLib targets and QuickSets.

NOTES:

- If you want to create searches in the Primo Central Index through a non-Ex Libris interface, you must upgrade your license.

- After MetaLib+ has been configured, you will be able to use the new MetaLib+ interface as well as your old MetaLib interface, which will not benefit from the new interface's features (such as increased Primo Central performance, facets, user reviews and ratings, sorting of results, and flexible UI customization).

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System Management

MetaLib+ allows you to manage and customize various aspects of the service.

Managing MetaLib Search Targets, QuickSets, and Users

MetaLib+ searches the databases and QuickSets defined for the MetaLib institution, taking into account the user authorization requirements and second affiliations defined in the MetaLib search targets. Users will be authenticated by the PDS server that is configured with the MetaLib institution.

With MetaLib+, the MetaLib institution will continue to manage the following:

- **Managing databases** – To manage MetaLib search targets (which also includes activation and authorization), continue to use the MetaLib Management interface. All changes to the search targets (such as additions and deletions) will take effect on the MetaLib+ Find Database page.

- **Managing users** – MetaLib+ uses the existing MetaLib PDS. User management will remain the same through the current systems used by the institution, whether it is MetaLib, ILS, LDAP, and so forth.

- **Updating resources in an existing QuickSet** – When adding or deleting resources, you will only need to update the QuickSet via the MetaLib Management interface. The changes will be applied automatically to MetaLib+.

- **Adding a QuickSet** – Create the QuickSet via the MetaLib Management interface and then open a Support Incident to the have the new QuickSet added to MetaLib+.

- **Removing a QuickSet** – Open a Support Incident to have the QuickSet removed from MetaLib+.

Managing Primo Central Collections

The PCI My Profile interface allows you to activate the Primo Central collections from which users can search in the Primo Central Index. For more details, refer to the *Primo Central Index Configuration Guide*.

Using the MetaLib+ User Interface

MetaLib+ uses the Primo technology and user interface, which is intuitive and user friendly, for discovery. For more details on using the user interface, refer to the MetaLib+ online help.
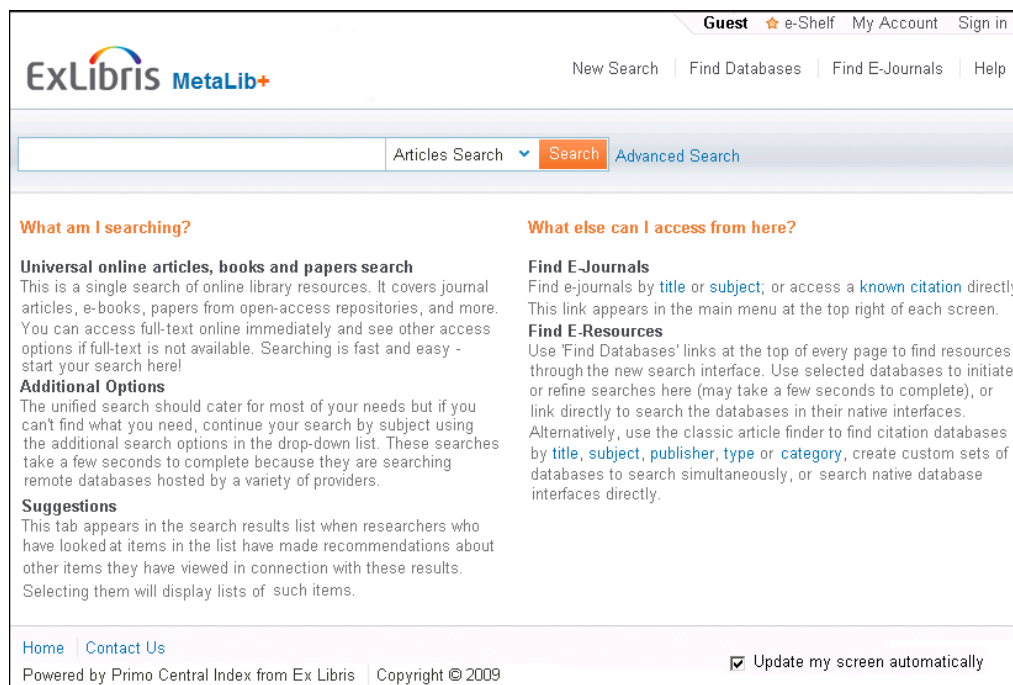
Figure 1: MetaLib+ User Interface Example

Customizing the MetaLib+ User Interface

After Ex Libris Professional Services implements the initial branding for your MetaLib+ user interface, you can customize files locally as needed and upload them to the MetaLib+ servers to be tested and eventually made available to the end users. For more information on uploading the files, see **The MetaLib+ Uploader** on page **11**.

The MetaLib+ UI contains tiles that allow institutions to display additional information that is specific to their institution (such as hours of operation, sign-in information, available services, and so forth) and to customize the interface to suit institutional branding.

To modify the content and appearance of these tiles, you can perform the following customizations:

■ Update the following out-of-the-box files, which are provided as static HTML files: `news.html`, `service.html`, `featured.html`, `header.html`, and `footer.html`.

The following figures show the standard slots of the static HTML files within the MetaLib+ UI:

Figure 2: Static HTML Slots

- Update the CSS for the UI to change the colors, fonts, and layout of the UI. You can create a modified CSS file that the system will load onto the page to change the default CSS elements. You do not need to repeat the default CSS, just add the changes and additions to your customized CSS file.

- Update any image files that are associated with the changes made to the CSS and static HTML files.

IMPORTANT:

You can modify the contents of the CSS and HTML files, but you must use the names (such as `header.html`) given to the files by Ex Libris Professional Services during implementation.

In addition, you can add files (such as images) with different names if they are called upon from the customized HTML and CSS files.

Testing the MetaLib+ User Interface

As part of the MetaLib+ implementation, you will receive URLs for the Production and Test views. The Test view enables you to display your view and test any changes prior to copying the customized files to the Production view, where the changes to the view are made available immediately to the end users. For information on uploading the customized files to the Test view, see **The MetaLib+ Uploader** on page **11**.

Using Deep Links

Because MetaLib+ uses the Primo technology and interface, you can use a variety of Deep Link formats to send a request in the form of a URL message and return the results in the MetaLib+ user interface. For more details, refer to the following page on EL Commons:

http://www.exlibrisgroup.org/display/PrimoOI/Deep+Links

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The MetaLib+ Uploader

> This section includes:
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> - **Introduction** on page **11**
> - **Accessing the MetaLib+ Uploader Page** on page **11**
> - **Using the MetaLib+ Uploader** on page **12**

Introduction

The MetaLib+ Uploader page (see **Figure 3**) allows you upload customized static HTML, CSS, and image files to the MetaLib+ servers, where you can manage and maintain these files for each of the following views:

- **Test** – This is a duplicate view of the live Production view. It allows you to test changes to the MetaLib+ UI before copying the changed files to the Production view.

- **Prod** – This is the Production view, which is open to your end users.

Accessing the MetaLib+ Uploader Page

After you have customized the files, use this tool to upload the files to the Test view, where they can be tested prior to making them public in the Production view. For more information, on customizing the UI, see **Customizing the MetaLib+ User Interface** on page **9**.

To access the MetaLib+ Uploader page:

1   Open a Web browser and enter the following URL:

http://pui-bo.hosted.exlibrisgroup.com:8080

2   Click the **Proceed to login** link.

3 Enter the user name and password provided by Ex Libris Professional Services.

The MetaLib+ Customer File Uploader home page opens (see **Figure 3**).

Using the MetaLib+ Uploader

From the Home page, you can upload and download files, copy files between views, view files, and delete files.
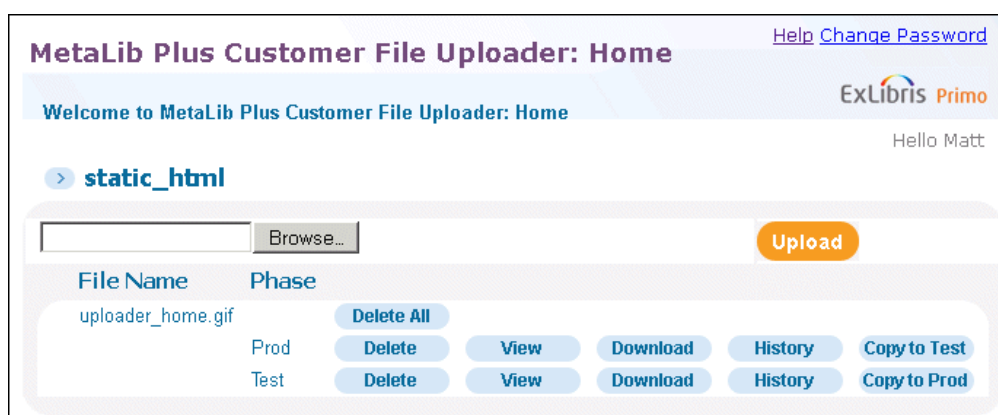

Figure 3: MetaLib+ Customer File Uploader Home Page

Uploading Files

After you have customized a file, use the MetaLib+ Uploader page to upload it to the MetaLib+ server.

Uploaded file are subject to the following restrictions:

■ The maximum file size is 500 KB.

■ Only alphanumeric characters, underscores, dashes, and periods are allowed in file names.

■ Only the following file extensions are permitted: **htm**, **html**, **css**, **jpg**, **jpeg**, **png**, and **gif**.

■ Files will be rejected if they contain viruses or other malicious content.

Once the files are uploaded to the Test view, you can test your changes by using the Test view URL provided by Ex Libris Professional Services.

To upload a file:

1 On the MetaLib+ Uploader Home page, click the **Browse** button to locate the file on your workstation.

2 Click the **Upload** button.

   If the file already exists in the Test view, the system will overwrite it. Otherwise, the file will be added to the Test view. The upload has no effect on files in the Prod view.

Downloading Files

The MetaLib+ Uploader page allows you to download files from the MetaLib+ server to your local workstation. This allows you to get the latest file or retrieve one that has been accidentally deleted from your workstation.

To download a file from either view, click the respective **Download** button on the MetaLib+ Uploader Home page.

Copying Files

The MetaLib+ Uploader page allows you to copy files between the Test and Prod views on the MetaLib+ server. If the file already exists in the target view, the system will archive it.

To copy a file to the other view, click either the **Copy to Test** button or the **Copy to Prod** button on the MetaLib+ Uploader Home page.

Once the files are copied to the Production view, the changes will be made available immediately for the end users.

Viewing Files

The MetaLib+ Uploader page allows you to view the current files used in each view. For image files, the system displays the image. Otherwise, the system displays the contents of the file.

To view a file, click the **View** button for the file on the MetaLib+ Uploader Home page.

Deleting Files

The MetaLib+ Uploader page allows you to remove files from the MetaLib+ server if you no longer need them. To delete a file, select from the following options:

■ **Delete a file for a specific view** – Click the **Delete** button in either the Test or Production view row.

■ **Delete all copies of a file** – Click the **Delete All** button next to the file.

Viewing the History of Files

The MetaLib+ Uploader page allows you to view the history of your files stored on the MetaLib+ server. For each view, the system displays the date and time the file was uploaded, overwritten, reverted, or copied from another view. In addition, you can perform the following actions on each version of the file:

- **View the file** – Click the **View** button to display either the image or the contents of the file, depending on the file's extension.

- **Revert to the previous version** – Click the **Revert** button to revert to the previous version of the file.
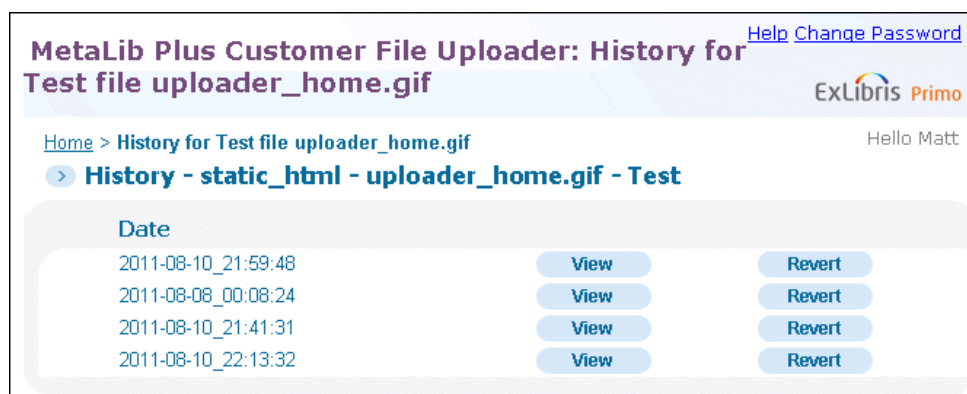

Figure 4: History Page Example

To view a file's history per view, click the **History** button for the file on the MetaLib+ Uploader Home page.