

Link to Holdings

Technical Bulletin

Number 002

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1 About this Bulletin

1.1 Purpose

This *Link to Holdings Technical Bulletin* provides information about Gale's Link to Holdings feature in InfoTrac Web with step-by-step instructions for implementing it in your library using the InfoTrac Config application.

1.2 Intended Audience

This bulletin is intended for librarians and technical support staff whose libraries currently have a Gale InfoTrac Web subscription and wish to provide patrons with a link from InfoTrac Web to their online (Web-based) catalog system.

1.3 Additional Information

Contact Gale's Customer Resource Center at **1-800-877-GALE** (1-800-877-4253) for further assistance. See Section 5 for a complete list of customer support contact information for North American and international customers.

2 Operation & Requirements

2.1 Operational Summary

InfoTrac Config allows you to make up to three of your library catalogs of periodical titles available to InfoTrac Web users with a single click at one or more of the following screens within InfoTrac Web:

- the Citation List
- the Article screen
- the Mark List



You specify how many **Link to Holdings** links (up to three) you want to appear in InfoTrac Web, depending on how many periodical catalogs you have. For example, you may have a Law library and a Humanities library that contain periodicals. You may customize the text that appears with each **Link to Holdings** link to direct patrons to the appropriate catalog.

If you choose to provide access to your holdings by enabling these links, you must then decide how you would like to make your holdings available. Two options are available: dynamic linking and static linking, as explained in the following sections.

2.1.1 Providing a Dynamic Link to Holdings

You may provide patrons with dynamic, real-time access to your library catalog without interrupting their searches in InfoTrac Web. Patrons can easily search for cited periodicals in your catalog by clicking the **Link to Holdings** link.

How it works: In a one-time setup procedure for each location, you will enter a search command URL for up to three of your library catalogs in InfoTrac Config along with text describing the link. When a patron clicks the **Link to Holdings** link, InfoTrac Web inserts behind the scenes the International

Three icons shown here are the standard fault icons. You may use customized graphics instead.



Standard Serial Number (ISSN) associated with the citation or article selected into your search command URL and executes a search of your catalog. When the library catalog is displayed—in a new browser window that is displayed on top of the InfoTrac Web window—patrons will see the relevant documents.

To ensure that patrons only see the **Link to Holdings** link for periodicals that your library holds, you may use InfoTrac Config to upload directly to Gale a text file listing the ISSNs contained in your holdings.

2.1.1.1 Library Catalog Requirements for Dynamic Linking to Holdings

To provide a dynamic link to library holdings, your catalog system must meet the following criteria:

- Your library catalog must use a Web interface for searching.
- The Web catalog interface must allow searching by ISSN.
- The ISSN search must be reproducible through a stable URL (i.e., the search command URL cannot require a unique, server-assigned session identifier). An example of a suitable search command URL is:
`http://my.university.edu/search/i?SEARCH=1234-5678`
where 1234-5678 is the ISSN for which the search is being conducted.
- Link to holdings is only available through the InfoTrac Web interface; libraries with ASCII client interfaces cannot take advantage of this feature.

2.1.1.2 Benefits of Dynamic Access

Linking to your holdings dynamically through InfoTrac Web provides you with the following benefits:

- Patrons have easy access to the most up-to-date and detailed library holdings information for serials using the ISSN.
- Once you enter the search command URL in InfoTrac Config, little or no further maintenance is needed on your part, except to periodically upload a text file of ISSNs as your collection of periodicals changes, if desired.

2.1.2 Providing a Static Link to Holdings

Alternately, if you subscribe to the DOS version of InfoTrac, you may provide patrons with a static image of your library catalog that you must update on a periodic basis. This holdings information is presented to your patrons when they click on a **Link to Holdings** link in InfoTrac. This option provides patrons with a *reference* to periodical holdings only; in order to interactively search your catalog, patrons must leave InfoTrac.

How it works: As with dynamic linking, you will specify from which screens within InfoTrac users can view your holdings. You will regularly upload the ASCII or MARC record information from your library catalog into a holdings file located on a Gale server. You do not need to specify any search command URLs as your catalog will not be dynamically searched.

Static access to a library catalog is available only to libraries with a subscription to the DOS version of InfoTrac. ***This technical bulletin details only the procedure for setting up dynamic linking; if you need further information on static linking, contact Gale Technical Support at 800-877-4253, option 4.*** If you wish to discuss other versions of InfoTrac Web, contact your Gale Representative.

3 Library Setup

Section 3 is for the library support person who understands and has access to InfoTrac Config. This section tells how to implement the Link to Holdings feature.

3.1 Overview

Here is an overview of the basic steps needed to set up the Link to Holdings feature using the InfoTrac Config application.

1. **Optionally create a text file of International Standard Serial Numbers (ISSNs) based on the journals, magazines, and newspapers your library holds in its collection.**

Create a text file of ISSNs only if you want to limit the holdings display to actual library holdings. Otherwise continue with the next step.

2. **Within InfoTrac Config use the Preference Details screen to enable the Link to Holdings feature for each location where you want patrons to have access to your holdings.**

You can decide to enable the Link to Holdings feature at one or more of the following screens in InfoTrac Web:

- the Citation List
- the Article screen
- the Mark List

3. **Use the Location Details screen to specify additional linking information for each location where you enabled the Link to Holdings feature.**

For each catalog (you may specify up to three) you wish to provide a link to:

- Enter the ISSN-based search command URL
- Enter the descriptive text you want patrons to see with the **Link to Holdings** link
- Optionally enter the URL for a customized icon to graphically represent the catalog, or use the default icon provided by InfoTrac Config
- Optionally upload the text file of ISSNs created in Step 1

The following sections will provide detailed instructions along with corresponding screen prints to guide you through this process.

3.2 Step 1: Create a Holdings File

See Section 3.1, beginning on page 7 for an overview of all the steps needed to set up the Link to Holdings feature using InfoTrac Config.

You will need to create an ASCII (text only) file of ISSNs based on the journals, magazines, and newspapers your library holds in its collection if you want the **Link to Holdings** link to appear only for periodicals available in your collection. Otherwise the **Link to Holdings** link will appear for any citation/article that contains an ISSN, regardless if the ISSN is actually part of your holdings or not.

Many library automation systems can either export ISSN information directly, or have reporting tools that can create a list of ISSN's. The file must be a text file and must contain one ISSN per line. Name the file "issn.txt" and save it to a location on your hard disk (e.g. c:\holdings\issn.txt) before you upload it to the Gale server. The file contents should look like this and must include hyphens:

```
0148-2076  
1085-9586  
0740-1590  
0194-5947  
0747-0088  
0001-3072  
1096-1453  
0895-4852
```

etc.

3.3 Step 2: Enable Linking in Preferences

See Section 3.1, beginning on page 7 for an overview of all the steps needed to set up the Link to Holdings feature using InfoTrac Config.

When setting up the Link to Holdings feature you must specify from which screens in InfoTrac Web the links will be available. This is done in the Preferences area of InfoTrac Config.

Remember that different locations can be assigned different preference settings. You must make sure that the Link to Holdings feature has been enabled for *each* preference set used by your library's locations.

The following provides step-by-step instructions for enabling the Link to Holdings feature.

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 Web site) for detailed information about starting and using InfoTrac Config.

2. Click the Preferences link.

The Preferences screen will be 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 where you want to implement the Link to Holdings feature.

The Preferences Detail screen will be 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. See your InfoTrac Config system administrator.

4. Scroll down toward the bottom of the page until you see the "Citation Page Options".

Below the "Citation Page Options" you will see the "Article Page Options" and "Mark List Options."

5. Click on one or all of the following Yes radio buttons as desired:

- **To include a Link to Holdings link on the Citation List**, click on the Yes radio button next to “Display holdings on citation page?” under “Citation Page Options,” as shown below.

Citation Page Options	
Citation format	<input type="radio"/> Brief <input checked="" type="radio"/> Detailed
Display Gale Group Magazine Collection numbers?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display Gale Group Business Collection numbers?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display Gale Group Fiche Collection numbers?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow display of Full Page (PDF) from citation page?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display holdings on citation page?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display SFX button on citation page?	<input checked="" type="radio"/> Yes <input type="radio"/> No

- **To include a Link to Holdings link with article retrieval options**, click on the Yes radio button next to “Display holdings with article retrieval options?” under “Article Page Options,” as shown below.

Article Page Options	
Display Gale Group article record numbers?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display full images with articles?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display subject headings with articles?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display subject headings as hotlinks?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display abstracts with articles?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display holdings with article retrieval options?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display SFX button with article?	<input checked="" type="radio"/> Yes <input type="radio"/> No

- **To include a Link to Holdings link on the Mark List**, click on the Yes radio button next to “Display holdings with the Mark List?” under “Mark List Options,” as shown below.

Mark List Options	
Display holdings with the Mark List?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display SFX button with the Mark List?	<input checked="" type="radio"/> Yes <input type="radio"/> No

Once one or more of these options have been set to Yes, you must also modify location information as shown in the next section in order to fully implement the Link to Holdings feature.

6. Click on the Save button at the bottom of the screen.

The Preferences screen is displayed.



7. **If desired, select the Modify link under the other preference sets to make the same modification and repeat Steps 4 through 6.**
8. **When you have finished modifying preference sets, go back to the main InfoTrac Config screen.**

Click the **Summary** link to return to the main screen.

9. **Proceed to the next section to configure location(s).**

3.4 Step 3: Configure Locations

See Section 3.1, beginning on page 7 for an overview of all the steps needed to set up the Link to Holdings feature using InfoTrac Config.

After you have enabled the Link to Holdings feature (see Section 3.3), you must modify your location information in InfoTrac Config to complete the process of setting up dynamic linking to your library holdings.

If you do not make the locations changes, InfoTrac Web will assume you have chosen static access to your holdings and will look for uploaded holdings information. See Section 2.1.2 for more information on static access.

Remember: You must make the following changes to *each* of the InfoTrac Config locations where you want to activate the link to holdings feature.

1. **Click on the Locations link in InfoTrac Config.**

The Locations screen will be displayed. This screen shows the locations that Gale has set up for your library.

2. **Click on the Modify link for the location where you want to enable dynamic access.**

The Location Details screen will be displayed.

If a **Modify** link does not appear with the location(s), it means that you have not been assigned privileges to modify locations. See your InfoTrac Config system administrator.

3. If necessary, scroll toward the bottom of the page until you see the “Library Holdings” section.

The fields shown in the screen print below will be displayed.

Library Holdings

Library Catalog 1

Enter the library catalog search command URL: (Maximum 512 characters)

← Step 4-a

Enter a name for this library catalog to be used as the link text:


Library Holdings

← Step 4-b

To apply a customized icon image, enter the image URL here.

← Step 4-c

Leave blank for default icon. To look best, icons should be 20 pixels high.
 Current icon is: (If this image does not appear, your image URL is incorrect.)



If you continue scrolling down you will see similar fields for “Library Catalog 2” and “Library Catalog 3.”

4. Enter access information for up to three library catalogs. Follow Steps a through c below for each catalog to which you want to create access. At least one catalog is required.

Remember, you specify how many **Link to Holdings** links (up to three) you want to appear in InfoTrac Web, depending on how many periodical catalogs you have. For example, you may have a Law library and a Humanities library.

a) Enter the library catalog search command URL.

Enter the library catalog search command URL: (Maximum 512 characters)

```
http://www.sampledigitallibrary.org/mw/linkinto?index=ISSN&words=[ISSN]&db=pe|
```

You may enter up to 512 characters. The format of the command depends upon the requirements of your library catalog system. Examples are provided below. The “[ISSN]” in these examples is part of the search URL definition

and would be typed as-is in InfoTrac Config. The actual ISSN from InfoTrac Web will replace it at the time of the search.

Examples of search command URLs

Note that these sample URLs are one continuous line and appear on multiple lines only to fit in this document.

```
http://www.sampledigitallibrary.org/mw/linkinto?index=
ISSN&words=[ISSN]&db=pe
```

```
http://public.library.org/search/i?SEARCH=[ISSN]
```

```
http://academic.library.edu/search/[ISSN]
```

```
http://classic.dra.lib.mi.us:8004/MARION?N=[ISSN]
```

```
http://voyager/cgi-bin/Pwebrecon.cgi?DB=local&
CNT=25+records+per+page&CMD=ISSN+%22 [ISSN] %22
```

```
http://aleph.exlibris.com:4545/ALEPH/-/ext-
find?base=exu01&find?base=exu01&find=022=[ISSN]
```

One way you can determine the search command URL for your library is to perform a search by ISSN, note the search command used by the system, and replace the particular ISSN value of the search with “[ISSN]”.

Do **not** enter any actual ISSN numbers in the search command URL.

Contact Gale Technical Support at 800-877-4253, option 4 if you need assistance setting up the search command URL for your library system.

b) Enter a description for the link.

Enter a name for this library catalog to be used as the link text:
Find Call Number and Location for the Journal


The description will appear in InfoTrac Web to describe the link. If you are providing dynamic access to two or more catalogs, make sure the description you enter is specific enough to properly direct patrons to the appropriate catalog. You may enter up to 80 characters.

c) **Optionally specify the URL for a customized icon representing the catalog.**

The icon displayed here will appear in InfoTrac Web.

To apply a customized icon image, enter the image URL here.

Leave blank for default icon. To look best, icons should be 20 pixels high.
Current icon is: (If this image does not appear, your image URL is incorrect.)



If you choose to use the InfoTrac standard (default) icon, leave this field blank. Otherwise enter the URL for a graphic image of the icon you wish to use instead. For best viewing, the icon should be 20 pixels high. Your current icon will be displayed; if an image does not appear, make sure you entered the correct URL.

Note that for catalogs two and three (if used) the InfoTrac default icons show a “2” and a “3,” respectively.

Repeat Steps a through c for *each* catalog, if needed. You may specify up to three catalogs. Scroll down the Location Details screen to see additional input fields.

5. **If desired, upload a text file of ISSNs to limit the display of holdings to only those held by your library.**

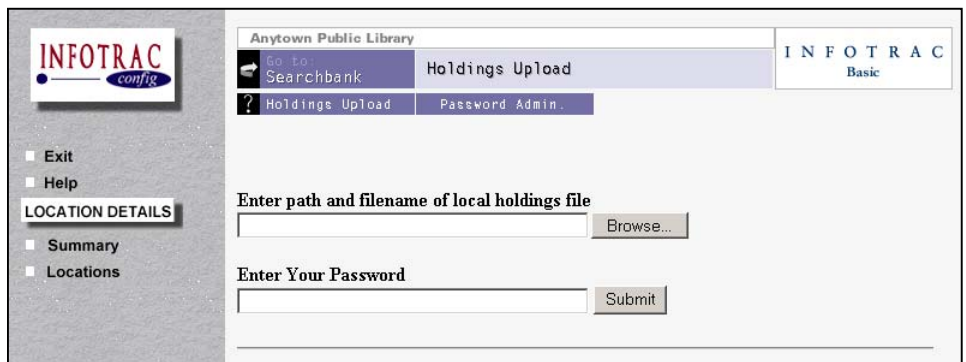
See Section 3.2 for how to create a text file of ISSNs.

[Click here to upload ISSN Holdings file now.](#)

Limit the holdings link to ISSNs listed in the holdings uploaded ISSN file.

Library Catalog 1 Library Catalog 2 Library Catalog 3

To upload to Gale the text file of ISSNs, click on the **Click here to upload holdings file now** link to display the Holdings Upload screen, which is shown in the screen print below.



Fill in the two entry boxes:

- Enter the path for the holdings file (e.g. c:\holdings\issn.txt). You may click the **Browse** button to locate the file you want to upload. Once you have found the file, click it to select it.
- Enter your password.

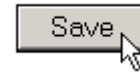
When you are done, click the **Submit** button. You will see a message indicating whether the file upload was successful. Use your browser's **Back** button to return to the InfoTrac Config Location Details screen.

Then click to place a checkmark before each catalog to indicate if you want InfoTrac Web to check the ISSN associated with the citation or article displayed against your text file of ISSNs. This will ensure that patrons only see the **Link to Holdings** link for citations and articles that reference periodicals your library holds.

If you have any questions about uploading ISSNs, contact Gale Technical Support at 800-877-4253, option 4.

6. Click on the Save button at the bottom of the screen.

The Locations screen is displayed.



7. If desired, select the Modify link with other locations to make the same modifications and repeat Steps 3 through 6.

8. When you have finished modifying locations, exit from InfoTrac Config.

Dynamic access to your library catalog(s) via one or more **Link to Holdings** links will be available at all of the locations you modified.

4 Frequently Asked Questions

4.1 General Information

4.1.1 What is the Link to Holdings feature?

If you choose, you may allow your InfoTrac Web patrons to link to periodical holdings information at specific points during their InfoTrac Web searches. In this way, a patron may find a reference to a particular journal or magazine and check immediately if it is available at your library, without leaving InfoTrac Web.

4.1.2 Is the Link to Holdings feature required?

No. You may choose not to implement this feature.

4.1.3 What aspects of the Link to Holdings feature can I customize?

Using InfoTrac Config you may customize the following aspects:

- Whether you want to provide patrons with dynamic or static access to your catalog. Note that static access is available only with the DOS version of InfoTrac. See Section 3.2 for more information.
- On which of the following screens you wish to make the **Link to Holdings** link available:
 - the Citation List
 - the Article screen
 - the Mark List
- The icon used for the **Link to Holdings** link. You may choose from a default icon or enter a URL for your own graphic.

- The text used to describe the **Link to Holdings** link.
- How many catalogs will be available. You may specify up to three of your library catalogs of periodical titles be available to InfoTrac Web users.
- If you want the **Link to Holdings** link to appear only for those periodical publications that your library holds.

4.1.4 Does the Link to Holdings feature work with any type of holdings? Can patrons see if the library holds certain books, for example?

No. The Link to Holdings feature works with periodical titles only.

4.1.5 What is dynamic vs. static access?

You may provide patrons with dynamic, real-time access to up to three of your library catalogs without interrupting their searches in InfoTrac Web. Patrons can easily search for cited periodicals in your catalog(s) by clicking the **Link to Holdings** link in InfoTrac Web.

Alternately, for DOS-based users, you may provide a static image of your library catalog that you must update on a periodic basis. This holdings information is presented to your patrons when they click on a **Link to Holdings** link. This option provides patrons with a *reference* to periodical holdings only; in order to interactively search your catalog, patrons must leave InfoTrac. See Section 2.1.2 for more information.

4.2 Technical Information

4.2.1 What are the requirements for dynamic access?

In order to provide patrons with dynamic, real-time access to your holdings during their InfoTrac Web sessions, your catalog must:

- Use a Web interface for searching.
- Allow searching on the ISSN field.
- Provide a reproducible, stable URL when searching the ISSN field (i.e., the search URL cannot require a unique, server-assigned session identifier). An example of a suitable search command URL is:

`http://my.university.edu/search/i?SEARCH=1234-5678`
where 1234-5678 is the ISSN number for which the search is being conducted.

4.2.2 What are the requirements for static access?

Static access is available only for libraries with DOS-based InfoTrac subscriptions. In order to provide patrons with static access to your holdings, you must periodically upload the ASCII or MARC record information from your library catalog into a holdings file located on a Gale server.

4.2.3 For dynamic access, what search command URL should I use?

You can see the format for the search command URL used by your library system by performing a search by ISSN and noting the URL used by the system.

Contact Gale Technical Support at 800-877-4253, option 4 if you need assistance in determining the search command URL for your library.

4.2.4 What is the text file of ISSNs and is it required?

The file of International Standard Serial Numbers (ISSNs) you may need to create is based on the journals, magazines, and newspapers your library holds in its collection. This file is uploaded to a Gale server so that InfoTrac Web can determine if your library holds a particular publication referenced by an InfoTrac Web search.

You must create a text file of ISSNs only if you want to limit the holdings display to actual library holdings.

4.2.5 How do I create a text file of ISSNs?

The file must be in text-only format and consists of one ISSN per line. Name the file "issn.txt" and save it to a location on your hard disk (e.g. c:\holdings\issn.txt). See page 8 for additional instructions.

Many library automation systems can either export ISSN information directly, or have reporting tools that can create a list of ISSN's.

4.2.6 How do I upload the list of ISSNs my library holds to Gale?

This can be done directly from InfoTrac Config using the Location Details screen, as described on page 14.

4.2.7 I enabled the Link to Holdings link on the Citation List, the Article screen, and/or the Mark List, but I don't see it in InfoTrac Web.

Check the following:

- After enabling the Link to Holdings feature using the Preference Details screen in InfoTrac Config, did you also configure the relevant information using the Location Details screen? See Section 3.4.
- Which InfoTrac Config locations did you modify? And which InfoTrac Web session did you start in order to view your changes? Remember that different locations can be assigned different preference settings. Make sure that you enabled the Link to Holdings feature in the correct preference profile(s) and that those preference settings have been associated with the correct location(s). See the *InfoTrac Config User's Guide* (available on the Gale Web site) for more information.

4.2.8 Why is the Link to Holdings link available, but I'm not getting a link to my catalog?

Patrons will see a “no matching ISSN” message from the catalog if the InfoTrac Web article they are linking from does not have a matching ISSN. Some InfoTrac articles use a placeholder ISSN if the article did not originally include an ISSN. In these cases, the **Link to Holdings** link will be available, but it will not link to a corresponding entry in the catalog.

4.2.9 Where can I find additional information?

Contact your Gale Technical Support representative at 800-877-4253 and select option 4. See Section 5 for additional customer support contact information for North American and International customers.

5 Customer Support

Gale is committed to supporting customers who use the Link to Holdings feature. We have a staff of customer support representatives trained to answer all your questions, and we have employed the latest technologies to provide fast access to the help you need.

Contact the Customer Resource Center groups at 1-800-877-GALE (4253). To expedite your requests, it helps to have your customer location ID in hand (if you do not know it, a Gale Representative will help you identify it).

5.1 Contacting Us

5.1.1 For U.S. and Canadian Customers...

1 - 800 - 877 - GALE (4253)

248 - 699 - 4253

To e-mail all Customer Resource Center departments, please go to www.gale.com and click **Customer Service and Education**, then click **Contact Us**.

Customer Service

8:00 a.m. - 7:00 p.m. M-F (EST)

PHONE 1-800-877-GALE

FAX 248-699-8093

Gale
Customer Service
27500 Drake Road
Farmington Hills
MI 48331

- Billing inquiries and invoice requests
- Fulfillment claims - lost or damaged product
- Identifying orders - subscription information
- Shipment of point-of-use materials

Search Assistance

24 Hours A Day, 7 Days A Week

PHONE 1-800-877-GALE

FAX 248-699-8093

Gale
Content Support
362 Lakeside Drive
Foster City
CA 94404

- Recommending Gale products that best meet your needs
- Consulting on search strategies
- Offering tips on maximizing the use of Gale databases
- Answering questions regarding content and editorial issues

Technical Support

24 Hours A Day, 7 Days A Week

PHONE 1-800-877-GALE, option 4

FAX 800-676-2345 or 248-699-8906

Gale
Technical Support
27500 Drake Road
Farmington Hills
MI 48331

- Web product questions - GaleNet, InfoTrac, Total
- Access, RDS and PSM
- Web product access issues - Proxy servers, Firewalls, IP authentication, Product URL's
- Location ID (username)/Password questions
- Usage reports for online databases
- CD-ROM product questions-GaleNet, Infotrac, PSM, Taft, K.G. Saur, and Macmillan
- CD-ROM installation questions - Network or Stand Alone environment

Web Installations

8:00 a.m. - 5:00 p.m. M-F (EST)

PHONE 1-800-877-GALE

FAX 800-676-2345 or 248-699-8906

Gale
Web Installations
27500 Drake Road
Farmington Hills
MI 48331

- Contact this group for new installations only

5.1.2 For International Customers...

Please direct customer service inquiries to **international@gale.com**.

For technical support, please contact **globaltech@gale.com**.

For additional contact information by region, go to **www.gale.com/world** and click the **Customer Service and Technical Support** link.

5.2 Internet

Customers in the United States and Canada can find Customer Resource Center contact information at www.gale.com. Click the **Customer Service and Education** link at the left, and then click the **Contact Us** link.

International customers will find global contact information by clicking the **Customer Service and Technical Support** link at www.gale.com/world.

Visit the Gale Web site to send us a message, join an e-mail list, search our online catalog, or review our tradeshow schedule. Bookmark it today!