

InfoTracSM Config

User's Guide

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INFOTRAC[®]

THOMSON



GALE

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Chapter 1

Welcome to InfoTrac Config!

This chapter provides a brief introduction to InfoTrac Config and provides an overview of using it to customize the InfoTrac Web interface:

- Introduction: highlights of InfoTrac Config
- How to use this manual
- Key concepts: an overview of the customization process, descriptions of the Main Menu items, and previews of the common screens, buttons, and links

Subsequent chapters build on this introduction to provide you with detailed information about the features of InfoTrac Config.

Introduction



Welcome to InfoTracSM Config, the Web-based tool you can use to customize InfoTrac Web for your library. InfoTrac Config allows you to choose the search strategies you want to make available to your staff and patrons, to customize your databases and search hints, to print selected reports, and more.

The Web-based tool that allows you to customize InfoTrac Web

InfoTrac Config enables you to customize the InfoTrac Web interface to reflect actual library search needs. Choose unique preferences for each InfoTrac Web location (a Web address; also known as a URL) – including Welcome and Search Page options and dynamic access to your library catalog... Create your own unique “search hints”... Assign interface preferences and print/e-mail options you want at individual locations... Set and modify access privileges... Generate reports on search preferences and statistics... The possibilities allow you to determine the perfect solution for your library.

In a series of easy steps, you just “point and click” to choose the features you want. You may change your settings as often as once per day.

When you change the InfoTrac Web search interface using InfoTrac Config, the online Help your users see when using InfoTrac Web will automatically be adjusted to correspond to the settings you chose.

About this Manual

This manual is your guide to all aspects of using InfoTrac Config:

- Key concepts, including key terms, information about logging on, the Welcome screen, and the Main Menu – this Chapter
- Preferences and Locations: customize the InfoTrac Web interface and specify settings for each library/InfoTrac Web location – Chapter 2
- Reports and Administration: view and print information about InfoTrac Web usage and configuration, and define authorized InfoTrac Config users – Chapter 3

- InfoTrac Custom databases and journals: (Subscribers to InfoTrac Custom databases only) modify the databases and journals you want to make available to library patrons – Chapter 4
- Customer Support: Detailed information about how to contact us and get support – Appendix A.
- Special Features: An overview of new or enhanced features, including Link to Holdings, OpenURL, and the Gale Ingenta Combined Service – Appendix B.

Contacting Us

Gale is pleased to offer InfoTrac Config to you and your library. If you have any additional questions about InfoTrac Config please contact Gale at:

1-800-877-4253

This number will connect you with all of the departments with which you may need to speak. To expedite your call, please have your customer number on hand.

For customers outside the U.S. and Canada, send an e-mail to ***international@gale.com***.

Additional contact information, hours of operations, and a list of departments are provided in Appendix A.

Key Concepts of InfoTrac Config

Key Terms

Advanced Search

While a bit more complex, this search allows much more flexibility than Keyword, Relevance, and Subject Guide Searches. Patrons specify search expressions that include an index, one or more words to search for (possibly with wild cards), and possibly one or more search operators. Patrons can also link two or more complete expressions or the results of previous searches with Boolean operators to form new search expressions based on one of two input styles: IAC's CCL (Gale's common command language) or Fielded Boolean. See Chapter 2 for more information.

custom database

InfoTrac Custom is a database content option for InfoTrac Web subscribers. It allows you to create unique databases of indexed, full text, and imaged newspapers or journals to meet special reference needs within your community. InfoTrac Custom databases are searchable with InfoTrac Web's customizable interface. See Chapter 4 for more information.

Gale Ingenta Combined Service

The Gale Ingenta Combined Service integrates Gale's core periodical collection on InfoTrac Web with Ingenta's collection of scholarly e-journals using the familiar InfoTrac Web interface. This feature is currently available to subscribers of *InfoTrac OneFile* (OneFile) and/or *Expanded Academic ASAP* (EAI). See Appendix B for more information.

index

A specific area/field of a database that can be searched, such as the author name field. Indexes are searchable using Advanced Search. See Chapter 2 for more information.

Keyword Search

This type of search looks for occurrences of words in major fields or in the full articles themselves, as opposed to a search for occurrences of words in editorially created subject headings. The search is an implied proximity search; a Keyword Search looks for entered words within two words of each other in either direction. Patrons can also use the Boolean (logical) operators *and*, *or*, and *not*. Matching citations are displayed from newest to oldest. See Chapter 2 for more information.

Link to Holdings feature

You may allow patrons to dynamically link to your library's periodical holdings information at specific points during their InfoTrac Web searches. See Appendix B for more information.

location

Corresponds to a URL (Web address) at which patrons can access InfoTrac Web. You can optionally configure a location to specify the following: custom databases (if you subscribe to InfoTrac Custom), preference set, language, and printing and electronic retrieval options. You may also set up links to your library holdings and/or your OpenURL server. Additionally, you may activate the Gale Ingenta Combined Service

for the location. Please note that only Gale can create new locations for you. See Chapter 2 for more information.

OpenURL (formerly SFX) feature

You may provide patrons a link to your OpenURL server at specific points during their InfoTrac Web searches. See Appendix B for more information.

preference set

A collection of settings which allow you to customize the look and feel of InfoTrac Web; *i.e.*, the interface. Preference sets allow you to determine the screens your patrons will see and the content of those screens, including determining which search options to make available to patrons and setting various display and linking options for the Citation List, Article, and Mark List pages. If you use InfoTrac Web in multiple locations, you may create one preference set for all locations or a unique preference set for each one. See Chapter 2 for more information.

Relevance Search

This type of search looks for occurrences of words in articles, but in a different way than Keyword Search. Relevance Search looks for words and variants (singular, plural, etc.), together and separately. It then evaluates the matches according to an algorithm that takes into account factors such as frequency of occurrence and position, and displays the most relevant citations first. Patrons can use double quotes to specify only exact matches and can prefix words and phrases with either a plus sign to require presence or a minus sign to require absence. See Chapter 2 for more information.

Subject Guide Search

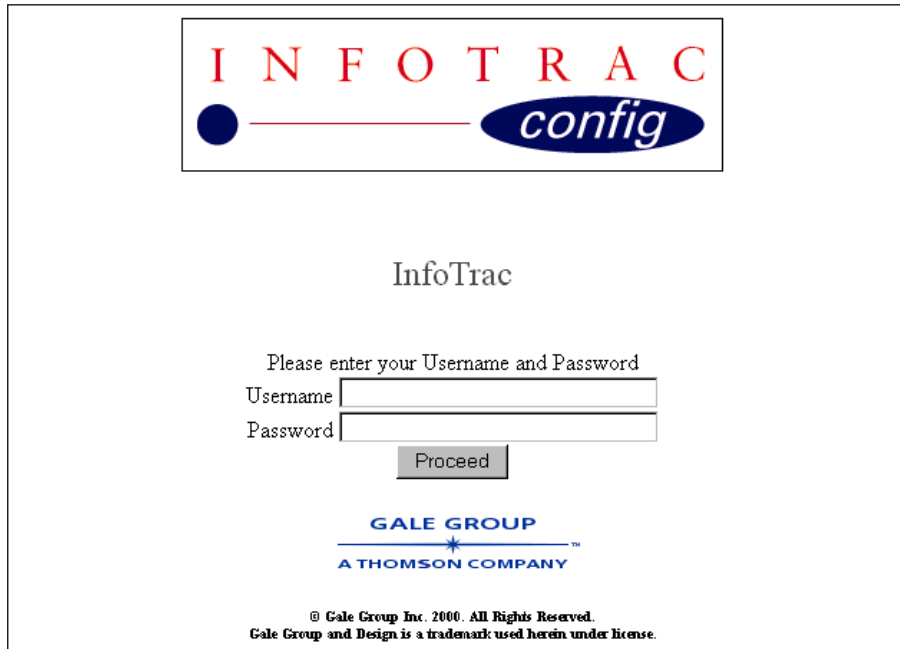
This type of search looks for occurrences of words in the Subject Guide, which is a list of subjects indexed by Gale editors. Many subjects are subdivided to allow greater precision and are cross-referenced for greater flexibility. There are also links between actual indexed subjects and equivalent phrases that patrons might type. To increase the chances for a successful search, any Subject Guide search that does not succeed automatically falls back first to a Keyword Search, then to a Subject Guide search for the first word only, then finally to a list of Subject Guide words in the alphabetical vicinity of the first word that was typed. See Chapter 2 for more information.

Access to InfoTrac Config

Your subscription to InfoTrac Web includes a URL (Internet address) to InfoTrac Config, as well as a primary Username and Password to use with the program. Only designated personnel will be authorized to log on and use InfoTrac Config (see “Controlling Access to InfoTrac Config” on page 50 for information about setting up user accounts).

Authentication Screen

The Authentication screen appears when you first enter InfoTrac Config, as shown below. You must enter a valid Username and Password to be verified as a valid administrator. Only library personnel authorized by the primary administrator have access to InfoTrac Config.



INFO TRAC
config

InfoTrac

Please enter your Username and Password

Username

Password

Proceed

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InfoTrac Config Main Menu and Summary Screen

After you have been confirmed as a valid user at the Authentication screen, the InfoTrac Config Summary screen is displayed, along with the Main Menu links in the frame at the left.

INFOTRAC config

Documentation Team Account

Subscription Summary

Database Name	Demo Custom Newspapers
Database Description	Custom Database with Newspaper Content
Type of Database	Newspapers
Number of Journals You Purchased	50
Number of Journals You Selected	32
Date Journals Added	Jul 8 2002
Date Journals Selected but not Added	Jul 8 2002
Changes Pending?	No
Number of Journals Planned	32
Next Allowed Change Date	Jul 9 2002

Location Summary

Location (URL) ID	doc_team
Location (URL) Name	InfoTrac Web Demo Site
Database Names	Demo Custom Newspapers
User Interface (Preference) Profile	TechRight1
Ingenta with e-commerce option active	
Ingenta UserName	"bonnie_h"
Ingenta Description	"Gale, USA, USA, , USA"

[Access to InfoTrac Web](#)

Exit
 Help
 Enable Setup Assistant
 Enable Setup Check
 SUMMARY
 Databases
 Journals
 Preferences
 Locations
 Reports
 Administration

The Summary screen provides a compact statement of the status of your library's subscription and location information.

Subscription Summary section

If your library subscribes to one or more *custom databases*,* the Subscription Summary section will contain a block for each custom database that includes the following:

- Name of database
- Description
- Type (newspapers or general periodical)
- Content information
- Pending content changes

If you have made changes to the list of journals/newspapers you wish included in your custom database(s), but have not processed those changes, you'll see a

* For a definition of terms in italics, see the "Key Terms" section beginning on page 3.

button labeled **Apply Pending Journal Changes** at the bottom of the block. Information is also presented next to “Next Allowed Change Date” to indicate the earliest date on which changes will take effect. See Chapter 4 for more information.

Changes made to custom databases are implemented once per day. If you make database changes twice in a single day, those changes will be implemented in sequence over two days.

Location Summary section

The Location Summary section includes a block of information for each InfoTrac Web *location* (URL) in your library:

- Name (ID) of location
- Description
- Custom databases available at the location
- *Preference set* (search interface) assigned to the location
- Ingenta option selected (with e-commerce, without e-commerce, or inactive) and the corresponding UserName and Description, if active

Each location block also contains an **Access to InfoTrac Web** link that lets you access the database(s) at that location.

Combined Service Summary (OneFile, Expanded Academic) section

Combined Service Summary (OneFile, Expanded Academic)

Ingenta with e-commerce option active (1 location)
 Ingenta without e-commerce (0 locations)
 Ingenta inactive (0 locations)

[Manage My Ingenta](#)

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Scroll down the Summary screen to see information regarding the *Gale Ingenta Combined Service* for your institution.

The Combined Service Summary (OneFile, Expanded Academic) section displays:

- Number of locations where Ingenta has been activated with the e-commerce option
- Number of locations where Ingenta has been activated without e-commerce

- Number of locations where Ingenta is inactive
- A **Manage My Ingenta** link that displays a log on screen in a separate browser window allowing you to access the Ingenta Web site to view and update your profile settings.

See Appendix B for a brief overview of the *Gale Ingenta Combined Service*.

Left-Frame Menu Links

The Main Menu links appear in the frame at the left of the screen, under the InfoTrac logo. The Summary option is highlighted to indicate that you are viewing the Summary screen. InfoTrac Config provides these menu options:

Exit	Leave InfoTrac Config and go to InfoTrac Web.
Help	Access help information.
Summary	Display an overview of subscription and location (URL) information. This is the default screen, displayed when you first enter InfoTrac Config.
Preferences	View, create, or modify preference sets that determine how InfoTrac Web appears to library patrons. See page 12.
Locations	For each InfoTrac Web location (URL) within your library, assign a preference set and possibly one or more custom databases; specify the printing and electronic retrieval options; and set up access to your library catalog and/or OpenURL server; and activate the Gale Ingenta Combined Service. See page 29.
Reports	Generate reports on database usage and the interface preference sets you have defined. See page 42.
Administration	Determine who has access to InfoTrac Config and what they may do. See page 50.

The following menu options apply only to subscribers of InfoTrac Custom databases. For more information about InfoTrac Custom databases, see Chapter 4.

Databases	Define the custom databases that will be available in InfoTrac Web. See page 56.
Journals	Define the periodicals that will be available in InfoTrac Web. See page 59.

Getting Help

Every screen of InfoTrac Config includes a **Help** link in the left-hand frame. Whenever you need assistance with a particular feature or function, just click this button. Help is context-sensitive, which means that the help information will be directly related to your current location and task. An index of Help topics is also available.

To navigate the Help screens, you can do some or all of the following:

- Click hyperlinked text to display another Help topic
- Click on the **Help Index** link to choose a specific help topic
- Use your browser's **Back** and **Forward** buttons to move from screen to screen
- Click **Return to...** from the frame on the left to go back to the last InfoTrac Config screen you viewed

Additionally, the *InfoTrac Web User's Guide* and other product documentation such as technical bulletins can be downloaded from www.gale.com. See page 66 for details.

Chapter 2

Preferences and Locations

InfoTrac Config enables you to customize the InfoTrac Web interface to meet the needs of your patrons. To do so, you define *preference sets*.^{*} Preference sets allow you to:

- Specify if the Welcome and Databases pages will be displayed
- Determine which search modes to make available to patrons and make default selections on how the searches will function
- Set various display and linking options for the Citation List, Article, and Mark List pages, including links to PDF images, your library holdings, and to an OpenURL server

You may also customize the *location* (URL) configuration to:

- Assign custom databases (if you subscribe to InfoTrac Custom)
- Specify preference set, language, and printing and electronic retrieval options
- Set up links to your library holdings and/or your OpenURL server
- Activate the Gale Ingenta Combined Service

If you use InfoTrac Web databases in multiple locations, you may create unique preference sets for the different locations.

^{*} For a definition of terms in italics, see the “Key Terms” section beginning on page 3.

Customizing Preference Sets

Using Default or Preset Preferences

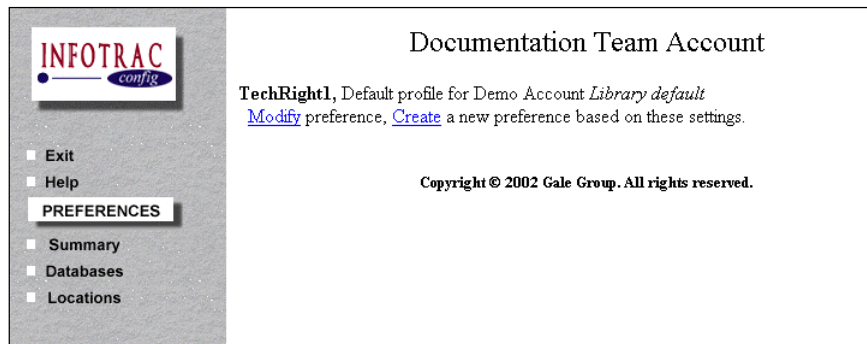
You are not required to create preference sets to customize InfoTrac Web. You may, if you like, do nothing and accept the default search interface settings that are in place when your library establishes its InfoTrac Web subscription. Or, if you prefer, you may use the prior non-customizable version of the InfoTrac Web interface, called InfoTrac Basic Style (formerly “SearchBank style”).

InfoTrac Basic offers a simpler interface without many of the features and search options available in InfoTrac Web, such as online dictionaries, InfoMarks, drop down date lists, and Relevance Search.

Whether you choose a customized or preset preference set, you will assign a preference set to each location using the **Locations** link on the Main Menu, as described starting on page 29.

Entering the Preferences Area

Clicking the **Preferences** link on the Main Menu displays the Preferences entry screen. This screen shows your available preference sets.



Links are embedded within each preference set to allow you to:

- **Read** or view a preference set without making any changes.
- **Modify** an existing preference set.
- **Create** a new preference set, using the selected preference set as a template.

The links that are displayed depend upon the privileges you have been assigned (see “Controlling Access to InfoTrac Config” on page 50).

Preference Details

After you select a link on the Preferences screen, the Preference Details screen is displayed.

The screenshot shows the 'Documentation Team Account' preference details page. On the left is a sidebar with the 'INFOTRAC config' logo and a menu with options: Exit, Help, **PREFERENCE DETAILS**, Summary, Databases, Locations, and Preferences. The main content area is titled 'Documentation Team Account' and includes the instruction: 'Please Enter your changes and click on the "SAVE" button at the bottom of this page.' The page is organized into several sections:

- General Options:**
 - Name of this search preference: TechRight1
 - Search preference description: Default profile for Demo Account
 - Is this your default preference? Yes
- Welcome Page Options:**
 - Do you want to display a welcome page? Yes No
- Databases Page Options:**
 - Do you want to display your database images? Yes No
 - Bypass the database menu if there's only one database? Yes No
 - Text message for the Database Page: Please select a collection to search
- Search Page Options:**
 - Clear Search button No clear Clear main field Clear all fields

This screen is where you to determine the look and feel of InfoTrac Web. The screen is divided into categories, which you will see as you scroll down:

- General Options
- Welcome Page Options
- Databases Page Options
- Search Page Options
- Preferred Search
- Limiting Options
- Citation Page Options
- Article Page Options
- Mark List Options
- Browse by Date Page Options

These categories are outlined below. After you have set the options as desired, click the **Save** button at the bottom of the Preference Details screen.

Remember: You may only make changes to a preference set if you selected **Modify** or **Create** at the Preferences entry screen (see page 12). Some fields are not available for updating when you select **Modify**.

General Options

General Options	
Name of this search preference	TechRight1
Search preference description	<input type="text" value="Default profile for Demo Account"/>
Do you want to make this the default preference for all locations?	<input type="radio"/> Yes

General Options allow you to specify:

1. Name of the preference set...

Note that you can only specify a name when you are creating a set, not when you are modifying a set. When you are modifying a set, the name is displayed but is not changeable.

2. Preference set description...

This description is displayed on the Preferences Entry screen to help you identify the preference set.

3. Default set indicator...

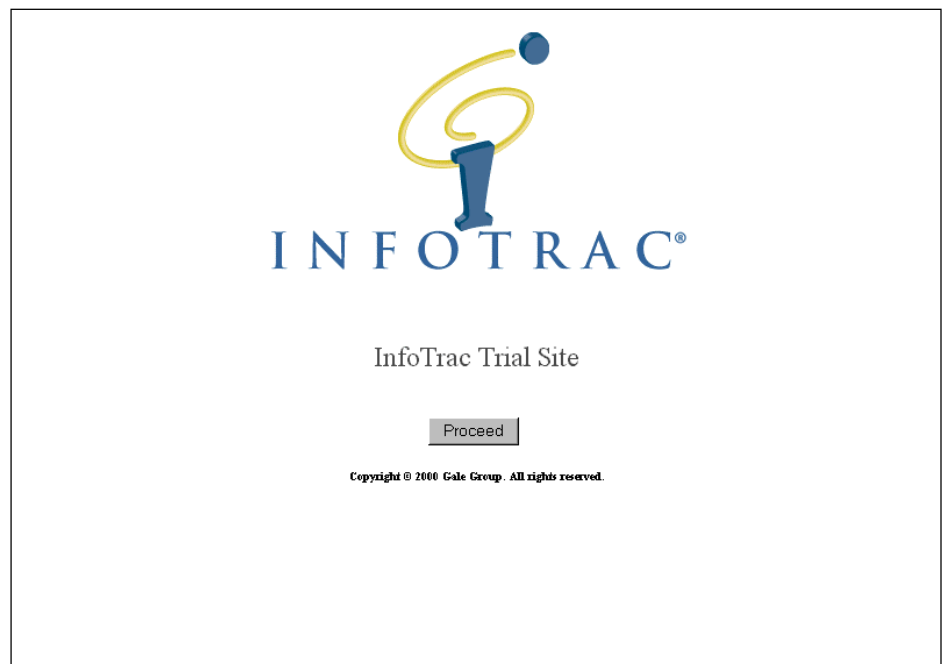
This indicates whether the preference set is your default set. The default preference set will be used by all locations for which you haven't specified another preference set. This indicator can only be specified when you are creating a set and when you have at least two preference sets available.

Welcome Page Options

Welcome Page Options
Do you want to display a welcome page? <input checked="" type="radio"/> Yes <input type="radio"/> No

Welcome Page Options allow you to specify whether a Welcome screen is displayed when patrons first enter InfoTrac Web.

When you enable this option, library patrons will see the Welcome screen after they authenticate into InfoTrac Web. If this option is not enabled, patrons will see the Databases screen after authentication.



How it will look in InfoTrac Web.

The Welcome Page has been enabled. Patrons must click the **Proceed** button to go to InfoTrac Web.

The title that appears on your Welcome screen cannot be changed through InfoTrac Config. Contact Gale if you need to make changes to the title that appears on this screen, the Databases screen (next page), or any of the other InfoTrac Web screens.

Databases Page Options

Databases Page Options	
Do you want to display your database images?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Bypass the database menu if there's only one database?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text message for the Database Page:	Please select a collection to search

The Databases Page Options allow you to decide how the databases available through your library are presented, including Gale’s proprietary databases, other publishers’ products offered through Gale, and any InfoTrac Custom databases to which your library may subscribe. You may:

1. Display database images...

You may choose to display pre-selected images with each database. These images serve as an alternate link that patrons can click to access the databases.

2. Bypass the Databases screen...

This option tells InfoTrac Web to skip the Databases screen if you have made only one database available. Patrons will go directly to the search screen for the default search type (*Keyword, Relevance, Subject, or Advanced Search*).

3. Message for Databases screen...

Type a message to be displayed at the top of the Databases screen.

How it will look in InfoTrac Web:

This sample InfoTrac Web Databases page shows the effects of the following Databases Page Options:

- Display database images has been set to **Yes**.
- This screen has **not** been bypassed since there are multiple databases.
- The text message at the top reads, “Please select a collection to search.”

The screenshot shows the InfoTrac Trial Site interface. On the left is a blue sidebar with the InfoTrac logo and navigation links: 'Help - Collections' and 'Back to library'. The main content area has a title 'InfoTrac Trial Site' and a message 'Please select a collection to search'. Below this is a list of database collections, each with a small image icon, a title, a description, and a 'Start searching' link. The collections listed are: 'Business Intl & Company Profiles 1997 - Sep 2000', 'Business Index ASAP 1980 - Sep 2000', 'InfoTrac Custom Newspapers', 'Contemporary Authors Sep 2000', and 'Contemporary Literary Criticism Sep 2000'.

Search Page Options

Search Page options are the heart of configuring InfoTrac Web. Here you can tailor InfoTrac Web's interface according to the needs and skill levels of your library's patrons.

Search Page Options allow you choose which types of searches (*Keyword, Relevance, Subject, and Advanced*) can be performed and which options are available on the search screens. See the "Key Terms" beginning on page 3 for descriptions of the four available search types.

Certain databases have distinct search methods that override any options chosen with the standard search methods. In addition, for certain specialized databases, some or all of the Keyword, Relevance, and Subject Guide search types might not be available. Advanced search is used in these cases.

Clear Search Button

The Clear Search button option at the top of the Search Page Options category determines whether a button is provided to allow patrons to clear the current search parameters. This option affects all search types.

Search Page Options
Clear Search button <input checked="" type="radio"/> No clear <input type="radio"/> Clear main field <input type="radio"/> Clear all fields

- **No clear** means no button will be displayed. Patrons will have to manually clear the main search field and any search limits they have set.
- **Clear main field** means a **Clear** button will be provided to erase the contents of the main search field with a single click.
- **Clear all fields** means a **Clear Form** button will be provided to erase the contents of the main search field and any search limits you have enabled (see page 22). Search results are not cleared.

Common Search Options

The remainder of the Search Page Options category is divided into options for each of the InfoTrac Web search types (Keyword, Relevance, Subject, and Advanced). Most of these options are the same for each search type; these options are described below. Beginning on page 20, the options unique to Advanced searches are described.

For each search type, you can customize the prompt and the search hint. You can also choose to display search results (the search expression plus the number of matches) in an area labeled “History” at the top or bottom of the screen. If you choose to display the search history, you must choose whether to display the list in a compact pull-down box or as a fully visible list. For each search method, whether you choose to display the search history or not, you can also choose to go straight to the Citation List after a successful search.

Keyword Search	
Allow searching by keywords?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text message for the search prompt:	<input type="text" value="Click in the entry box and enter search term(s)"/>
Search hint: (maximum 280 characters)	<div style="border: 1px solid gray; padding: 5px;">Type words to search for. You can use AND, OR, NOT. Results are sorted by date.</div>
Search for words in	<input checked="" type="radio"/> Title, citation, abstract <input type="radio"/> Entire article content
Show Keyword Search History	<input checked="" type="radio"/> Below input area <input type="radio"/> Above input area <input type="radio"/> No search history
Keyword Search History format	<input type="radio"/> In a pull down box <input checked="" type="radio"/> Complete list
Go directly to the citation list after a Keyword search?	<input type="radio"/> Yes <input checked="" type="radio"/> No

1. Allow searching by...

Clicking **Yes** will make the search type available in InfoTrac Web. Clicking **No** will make it unavailable, and the option will not appear on the InfoTrac Web Main Menu.

2. Text message for the search prompt...

Type a message to appear above the search field. Use the default text as a guide.

3. Search hint...

Type a more detailed search prompt to help your patrons conduct a search. Use the default text as a guide.

4. Search for words in...

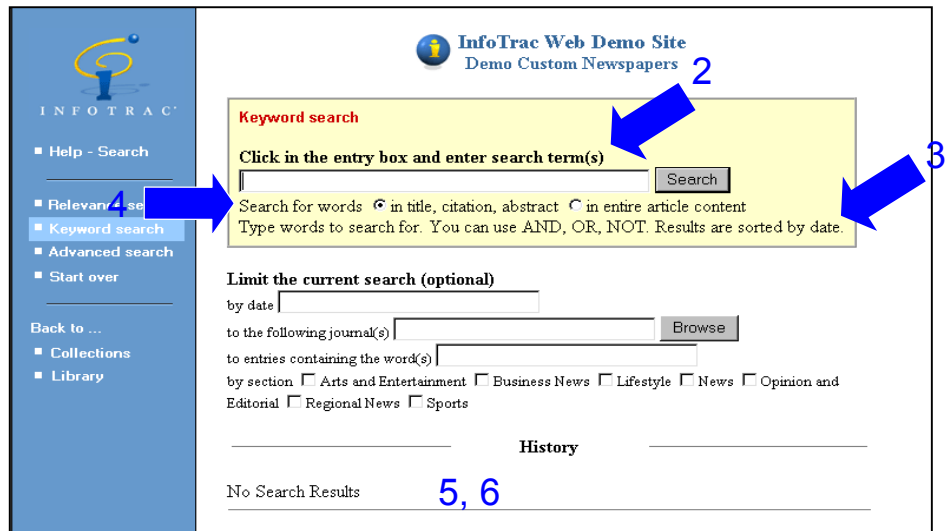
Click the **Title, citation, abstract** or **Entire article content** radio button to tell InfoTrac Web where it should initially search for the patron's search term(s). The patron may override this default selection at the time of the search.

This option does not apply to Subject Guide or Advanced searches.

5. Show search history...

Specify whether search history should be displayed, and where it should be displayed. If you choose to have it displayed, you can have it appear **Below input area** or **Above input area**.

How it will look in InfoTrac Web.

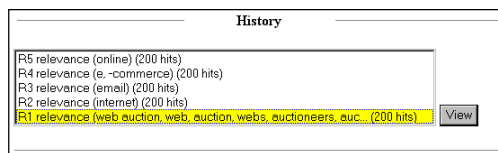


6. Search history format...

You can choose to have the search history (also known as the Result Set) displayed **In a pull-down box** (will display a scroll bar for long lists) or as a **Complete list**.

How it will look in InfoTrac Web

Pull-down Box



Complete List



7. Go directly to Citation List...

This determines whether InfoTrac Web displays a Citation List or a Result Set after a search. The Citation List displays a brief reference to an article or document that matches the search criteria. It will typically include the article title, author, and publication information, and may also include a title annotation. The Citation List may also provide links that allow you to view the article/document in PDF format, search library holdings, and/or display additional, relevant information pertaining to the article/document through electronic resources utilized by your library via your OpenURL server. See page 24 for more information on customizing the Citation List.

The Result Set displays your search history as accumulated from all search modes. It shows a brief summary of the search expression and the number of resulting citations. The format of the Result Set may be either in a pull-down menu or as a complete list, depending on the selection made in the previous step.

Additional Advanced Search Options

1. Input style to use...

You can choose either of two Advanced search input styles: IAC's CCL (Gale's common command language) or Fielded Boolean, as described below.

CCL

With CCL, the entire search expression is entered as a single line in the search entry box. Patrons construct their own customized expressions by selecting index(es) from the drop-down list and manually typing search expressions, wild cards, and operators in the search field.

How it will look in InfoTrac Web

With the CCL input format, your patrons will see that some index choices end with the word "List." The "List" choices allow patrons to browse a list of all index entries that match their search. See the *InfoTrac Web User's Guide* for more information on browsing indexes with the CCL Format.

Fielded Boolean

With Fielded Boolean, separate fields (boxes) are provided for entering each index/term combination. The search box contains three lines, each with three fields. The first field is a drop-down menu of available indexes. The indexes that are displayed are determined by the settings you make in Step 2, below. The second field is where patrons type their search term(s). The third field is a drop-down list of Boolean operators (AND, OR, NOT).

How it will look in InfoTrac Web

Advanced search

Click in the entry box and enter search expression

Key Word (ke) ▾		AND ▾
Text Word (tx) ▾		AND ▾
Subject (su) ▾		Search

Select index, then enter search term. Use AND, OR, or NOT to connect expressions.

Patrons select indexes, fill in one or more of the search input boxes, and select a Boolean operator to define a search expression as simple or complex as they choose.

2. Indexes allowed for Advanced search...

How it will look in InfoTrac Web

Select the indexes you wish to allow for Advanced Search:

Keyword (KE)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Publication Date (DA)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Journal Name (JN)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Words in Text (TX)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Subject (SU)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Record Number (RN)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Article Content (AC)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Words in Titles (TI)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Author (AU)	<input checked="" type="radio"/> Yes <input type="radio"/> No
Refereed (RE)	<input checked="" type="radio"/> Yes <input type="radio"/> No

Whichever Advanced Search style you choose, you also have control over which **indexes** patrons can search. *Indexes* are specific areas/fields of the database in which to conduct a search. For example, patrons can search the author name fields using the AU index, or within the full text (words in text) of all refereed (peer-reviewed) articles using the TX and RE indexes. If you will be allowing limiting on Publication Date or Journal Name (see page 22), you can, if you wish, eliminate the DA and JN indexes, respectively, from regular searching.

Which indexes you allow is especially important with the Fielded Boolean input style. If all indexes are available, the suggested indexes for the three

search input boxes are Keyword, Words in Text, and Subject, in that order. Eliminating any of those indexes will affect the displayed suggestions. You might want to experiment with different selections of indexes until you're happy with the three suggested offerings.

With CCL input style, patrons can always type an index name, even if you have deactivated the index. This option only determines which indexes are presented in the drop-down list.

Preferred Search Option

If you permit more than one search type, you must choose which will be the preferred type. The preferred type is the one that comes up automatically when patrons first enter a particular database. Any other enabled search types will still be available through links in the InfoTrac Web Main Menu.

Preferred Search	
Preferred search method	<input type="radio"/> Keyword <input type="radio"/> Relevance <input checked="" type="radio"/> Subject Guide <input type="radio"/> Advanced

Search Limit Options

Limiting options determine which, if any, search limits are displayed on the search screens in InfoTrac Web. You may also specify the text messages (prompts) that are associated with each of the limits and, in some cases, the format for entering the limits.

Limiting Options	
Text message for limiting:	<input type="text" value="Limit the current search"/>
Allow limiting to full-text articles?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text message:	<input type="text" value="to articles with text"/>
By default, full-text limiting is	<input checked="" type="radio"/> On <input type="radio"/> Off
Allow limiting to refereed publications?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text message:	<input type="text" value="to refereed publications"/>
By default, refereed limiting is	<input checked="" type="radio"/> On <input type="radio"/> Off
Allow limiting by publication date?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text message:	<input type="text" value="by date"/>
How do you want to enter dates?	<input checked="" type="radio"/> Text box (exact dates) <input type="radio"/> Checkboxes (years) <input type="radio"/> Drop down boxes (day, month, year)
Allow limiting by journal?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text message:	<input type="text" value="to the following journal(s)"/>
How do you want to input journal names?	<input type="radio"/> Text box (single journal) <input checked="" type="radio"/> Drop-down list (up to 10 journals)
Allow limiting by words in text?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text message:	<input type="text" value="to entries containing the word(s)"/>
Allow limiting by section?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Text message:	<input type="text" value="by section"/>

1. Text message for limiting...

Determines the text message that appears at the top of the limiting options on the search screens.

How it will look in InfoTrac Web

Note that the word “optional” that appears in parentheses is added automatically by InfoTrac Web; do *not* enter it in InfoTrac Config, otherwise it will appear twice.

2. Allow limiting to full-text article and selecting the default setting ...

Allow patrons to limit their searches to articles that have the full text of the article rather than only reference or abstract information. Applies only to databases that provide full-text articles. You may specify whether this option is turned on (checked) when patrons first enter the search screen by clicking the **On** radio button after the prompt, “By default, full-text limiting is”.

3. Allow limiting to refereed articles...

Allow patrons to limit their searches to articles from peer-reviewed journals. This option does not apply to all databases. You may specify whether this option is turned on (checked) when patrons first enter the search screen.

4. Allow limiting by publication date...

Allow patrons to limit their searches to articles published on, after, before, or between specified publication dates. You may specify that this option appear in one of these ways:

- **Textbox (exact dates).** A single field (box) into which patrons can type a date or date range (range operators may be used).

by date

- **Checkboxes (years).**

by date 2002 2001 2000 1999 1998 1997-1980

- **Drop-down boxes (day, month, year).**

by date all dates before on after
 between and

5. Allow limiting by journal...

Allow patrons to limit their searches to articles from a particular publication. You may specify that this option appear in one of these ways:

- **Text box (single journal).** A single field (box) into which patrons can enter a specific journal name.

to the following journal(s)

- **Drop-down list (up to 10 journals).**

to the following journal(s)

The **Browse** button allows patrons to select up to ten journal names from the Journal Selection screen, which lists available journals in alphabetical order.

6. Allow limiting by words in text...

Allow patrons to limit their searches to articles containing a particular word or words. Wild card characters and logical operators may be used.

7. Allow limiting by section...

Allow patrons to limit their searches to articles from a particular section of a newspaper (available for custom newspapers).

Citation Page Options

Citation Page Options are used to specify the format of the Citation List, its content, whether Full Page (PDF) files can be displayed, and whether links will be available to library holdings and OpenURL (SFX) resources.

Citation Page Options	
Citation style?	<input checked="" type="radio"/> Text <input type="radio"/> Icon
Citation format?	<input type="radio"/> Brief <input checked="" type="radio"/> Detailed
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
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





1. Citation style...

You may select a “Text” or “Icon” citation style for any links that may appear on the Citation List. Possible links that may appear on Citation List include:

- The type of content (text, graphics, abstract, etc.) in the full record

- Alternate formats that may be available, such as the number of PDF pages, if enabled
- One or more links to your library holdings, if enabled
- A link to your OpenURL server, if enabled

The text style shows hyperlinked descriptions such as “Text,” “Text with graphics,” “Abstract,” “7 full pages PDF,” etc. The icon style displays small images patrons can click, such as an icon of a printed page, which indicates text, or a camera icon, which indicates graphics, etc., as shown in the following table:

Icon	Text	Indicates this type of record content...
	<u>Abstract</u>	Article citation and abstract (brief synopsis of the article)
	<u>Citation</u>	Article citation only
	<u>Text</u>	Full text of the article
	<u>Text with graphics</u>	Full text of the article and any available graphics; may include thumbnail graphics which can be expanded to full size

Additionally, you can customize the icons that appear for your library holdings and/or your OpenURL server using the Location Details screen (see the instructions beginning on page 30).

When the icon style is selected, patrons can position the mouse over the icon to pop up its text description.

2. Citation format...

You may select either “Brief” or “Detailed.” Brief citation format includes a title, publication, date, and possibly one or more collection numbers. Detailed citation format adds any title annotations, author(s), and publication information (such as a page reference).

3. Allow display of full page PDF images from Citation List...

Some article citations will provide a direct link to an image of the original article in PDF format. This option determines whether the link will be shown on Citation Lists.

4. Display holdings on Citation List...

This option determines whether Citation Lists include links to denote information that is available in your library’s holdings. Citation Lists can display up to three links representing holdings information specific to each citation that references a periodical. Each link represents a specific library catalog that when clicked will display holdings information in a separate browser window. You must also use the Location Details screen to specify how many links will be available, along with other information necessary to implement the Link to Holdings feature. See page 35.

See Appendix B for a brief overview of the Link to Holdings feature.

5. Display OpenURL (SFX) button...

The OpenURL feature (formerly known as SFX) allows your InfoTrac Web patrons to search for the full text of a citation/article or for additional, relevant information pertaining to the citation/article through electronic resources utilized by your library. You may choose to include a link to your OpenURL server on the Citation List. When a patron clicks on the **OpenURL** link for a given citation, the various search options of your library’s OpenURL service available for that citation will be presented in a separate browser window. You must also use the Location Details screen to specify additional information necessary to implement the OpenURL feature. See page 33.

See Appendix B for a brief overview of the OpenURL reference linking feature.

6. Display Gale Magazine, Business, or Fiche Collection numbers...

Allows you to determine whether microform collection numbers are displayed. These numbers can be used in Advanced searches to locate specific articles.

Article Page Options

Article Page Options allow you to determine how you would like articles displayed in InfoTrac Web.

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 type="radio"/> Yes <input checked="" type="radio"/> No

1. Display Gale Article Record numbers...

Allows you to determine whether Gale article numbers are displayed. These numbers can be used in Advanced searches to locate specific articles.

2. Display full images with articles...

For articles that contain images, this option specifies whether the images should be displayed as full images or thumbnail (smaller) images. Thumbnail images will display faster, especially with slower Internet connections.

3. Display subject headings with articles... and Display subject headings as hotlinks...

Articles that are indexed by subject can be displayed with their subject heading(s). These subject headings may be displayed as links that allow patrons to jump to related topics.

4. Display abstracts with articles...

For articles with abstract information, you may choose to display the abstract with the article.

5. Display holdings with article retrieval options...

This option determines whether article retrieval options (printing, e-mail, etc.) on the Article screen include information about whether the article is available in your library's holdings. Article screens can display up to three links representing holdings information specific to each article that references a periodical. Each link represents a specific library catalog that when clicked will display holdings information in a separate browser window. You must also use the Location Details screen to specify how many links will be available, along with other information necessary to implement the Link to Holdings feature. See page 35.

See Appendix B for a brief overview of the Link to Holdings feature.

6. Display OpenURL (SFX) button...

The OpenURL feature (formerly known as SFX) allows your InfoTrac Web patrons to search for the full text of a citation/article or for additional, relevant information pertaining to the citation/article through electronic resources utilized by your library. You may choose to include a link to your OpenURL server on the Article screen. When a patron clicks on the **OpenURL** link for a given article, the various search options of your library's OpenURL service available for that article will be presented in a separate browser window. You

must also use the Location Details screen to specify additional information necessary to implement the OpenURL feature. See page 33.

See Appendix B for a brief overview of the OpenURL reference linking feature.

Mark List Options

While viewing Citation Lists, your patrons can mark citations for later viewing, printing, or electronic retrieval (articles may also be marked at the Article screen). The citations marked are displayed on the Mark List and remain available during the patron’s current InfoTrac Web session. The Mark List allows patrons to view and/or retrieve articles that interest them all at once, rather than doing so one by one.

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 type="radio"/> Yes <input checked="" type="radio"/> No

1. Display holdings with the Mark List...

This option determines whether the Mark List includes links to denote information that is available in your library’s holdings. The Mark List can display up to three links representing holdings information specific to each citation that references a periodical. Each link represents a specific library catalog that when clicked will display holdings information in a separate browser window. You must use the Location Details screen to specify how many links will be available, along with other information necessary to implement the Link to Holdings feature. See page 35.

See Appendix B for a brief overview of the Link to Holdings feature.

2. Display OpenURL (SFX) button...

The OpenURL feature (formerly known as SFX) allows your InfoTrac Web patrons to search for the full text of a citation/article or for additional, relevant information pertaining to the citation/article through electronic resources utilized by your library. You may choose to include a link to your OpenURL server on the Mark List. When a patron clicks on the **OpenURL** link for a given citation, the various search options of your library’s OpenURL service available for that citation will be presented in a separate browser window. You must also use the Location Details screen to specify additional information necessary to implement the OpenURL feature. See page 33.

See Appendix B for a brief overview of the OpenURL reference linking feature.

Browse by Date Page Options

Browse by Date Page Options	
Number of pages on browse list? <input type="radio"/> 1 page <input checked="" type="radio"/> 4 pages <input type="radio"/> 8 pages	

If your library subscribes to *The Times Digital Archive*, you may set the number of pages for the browse list option to 1, 4, or 8 pages. This setting controls how many small images of actual newspaper pages will appear at one time when the patron is browsing by date. The number of pages selected also controls how many pages forward or back the patron will move when clicking the navigational arrows. Regardless of the number of pages you select for the browse list, patrons will be able to navigate to any page in the selected issue or an adjacent issue.



Once you complete all of the options on the Preference Details screen, click on the **Save** button at the bottom of the screen. You will be returned to the Preferences entry screen.

Customizing Locations

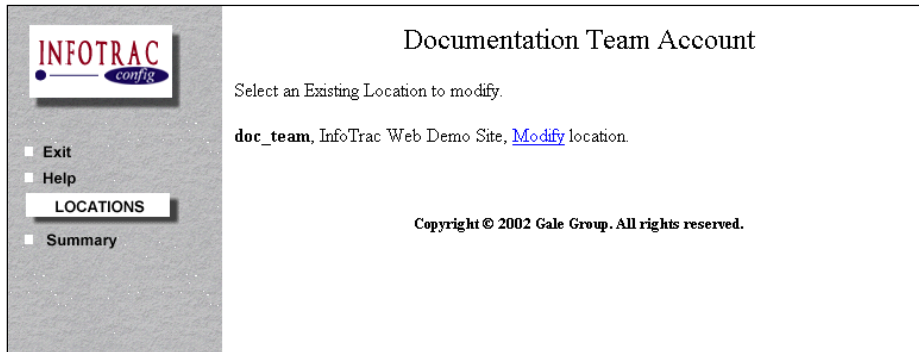
Locations in InfoTrac Config allow you to assign a preference set and to specify retrieval and other options for each InfoTrac Web location (URL) in your library.

Using Default Locations

You are not required to customize locations. You may, if you like, do nothing and accept the default settings. With default settings, all locations will use all available databases, the preference set specified as the default, the English language, and allow all retrieval options except Article Station. Note that with the default settings, the Link to Holdings, OpenURL (formerly SFX), and Ingenta features are *not* enabled. See Appendix B for an overview of these features.

Entering the Locations Area

The **Locations** link on the Main Menu displays the Locations entry screen, as shown below.



This screen shows the name and description of your available locations. Links are embedded with each location to allow you to:

- **Read** or view a location without making any changes.
- **Modify** the settings for an existing location.

The links that are displayed depend upon the privileges you have been assigned (see “Controlling Access to InfoTrac Config” on page 50).

Only Gale can create new locations for you. Contact your Gale Representative for more information.

Location Details

After you select a link on the Locations entry screen, the Location Details screen is displayed. The options provided on this screen are described below.

After you have set the options as desired, click the **Save** button at the bottom of the Location Details screen.

Location (URL) ID Settings

Use the Location (URL) ID section to assign custom databases, profile preference, language, retrieval options, and the exit URL.

Documentation Team Account

Please Enter your changes and click on the "SAVE" button at the bottom of this page.

Location (URL) ID **doc_team**

Location Description (URL NAME) InfoTrac Web Demo Site

Which database(s) to assign to this location:

Demo Custom Newspapers

Select the user interface profile (preference) to use for this location:

InfoTrac Basic Style

TechRight1

Select the language to use for multi-language databases for this location:

English

Spanish

French

Select the retrieval options for this location:

Article Station

PDF

E-mail

Postscript

Local Printing

Enter the URL you want users to exit to:

1. Location (URL) ID...

You will see a short identifier for the location, along with a longer description. The Location ID was created for you by Gale and cannot be changed.

2. Databases to assign...

Checkboxes are provided for each of the databases available to your library based on your InfoTrac Custom subscription (see Chapter 4). You may choose to provide access to any or all of the databases at each location.

3. User interface profile (preferences)...




Each preference set you have created is listed (see page 12). The preference set that you have designated as the default will be enabled (checked). You may choose from any of the available preference sets. You may also choose to use the InfoTrac Basic Style, formerly called SearchBank style. The InfoTrac Basic interface is a simpler interface without many of the search options described in the Preferences section on the previous pages in this chapter. InfoTrac Basic style does not support the use of cookies or InfoMarks (see the *InfoTrac Web User's Guide* for more information about InfoMarks).



4. Language for multi-language databases...

You may choose to have content from multi-language databases displayed in English, Spanish, or French.

5. Retrieval options...

You may enable or disable the following article retrieval options at each location by clicking the appropriate check box. Each of the article retrieval methods – printing or electronic retrieval – produces particular types of hardcopy output.

Retrieval method	Output type	What patrons will see	Print on local printer or at remote locations?
<p>Article Station</p> <p>This refers to InfoTrac Articles (U.S. and Canadian only)</p>	<p>Enhanced ASCII text or a full page image of the article as it originally appeared in print form (depends on the article).</p>		<p>Prints at a special InfoTrac Articles workstation at the library.</p>
<p>PDF</p> <p>This refers to files that can be viewed using Acrobat Reader</p>	<p>Full page image, where available, as it originally appeared in print form.</p> <p>The full page may include advertisements and other non-article content in the original publication.</p>		<p>Yes, if computer is equipped with Acrobat Reader (available free from Adobe Corporation).</p>
<p>E-mail</p>	<p>ASCII text without graphics.</p>		<p>Yes, after retrieving the file from the designated e-mail account.</p>

Retrieval method	Output type	What patrons will see	Print on local printer or at remote locations?
PostScript	Text (not ASCII) formatted according to PostScript protocols.		Yes, if using a PostScript compatible printer.
Local Printing This refers to the “Print” function in your Web browser’s File menu.	Exactly what you see on-screen, including navigational menus and other non-article content.		Yes

6. Exit URL...

Type the Web address (URL) that you would like patrons to be taken to when they exit from InfoTrac Web. You do not need to include the “http://” in the address. You may specify the InfoTrac Web URL to force the station to keep InfoTrac Web displayed. Or, you may choose to have your library’s Web site displayed.

OpenURL (SFX) Settings

The next set of options pertains to the OpenURL (formerly SFX) reference linking feature. You may provide a link to the OpenURL server used by your library so that patrons may access OpenURL resources directly from InfoTrac Web.

You must enable the OpenURL feature on the Preference Details screen (see the instructions beginning on page 12) and then modify your location information to complete the OpenURL setup process. If you do not make the location changes as shown in this section, OpenURL functionality will not be implemented.


See Appendix B for a brief overview of the OpenURL feature.

Open URL (SFX)

Enter the address of the OpenURL server:
 ←

Enter a name for this OpenURL server to be used as the link text:
 ←

To apply a customized OpenURL icon, enter the URL here: (Optional - used for icon citations)
 ←

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.)


The icon displayed here will appear in InfoTrac Web.

1. Enter the OpenURL server address.

Enter the base URL to your OpenURL server. For example:

```
http://mylibrary.sfxserver.lib.us
http://demo.exlibrisgroup.com:8888/demo
```

2. Enter a description for the link.

The description will appear in InfoTrac Web to describe the link to your OpenURL server. You may enter up to 80 characters.

3. Optionally specify the URL for a customized icon representing the OpenURL server.

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.

If you would like the icon image shown here to appear on the Citation List, make sure to set the citation style on the Preference Details screen to “Icon” (see the instructions beginning on page 24), otherwise the link text will appear.

Library Holdings Settings

The next set of options pertains to the Link to Holdings feature. You may provide links to up to three of your library catalogs so that patrons may dynamically search your holdings directly from InfoTrac Web.

You must enable the Link to Holdings feature on the Preference Details screen (see the instructions beginning on page 12) and then modify your location information to complete the Link to Holdings setup process. If you do not make the location changes as shown in this section, Link to Holdings functionality will not be implemented.

See Appendix B for a brief overview of the Link to Holdings feature.

The icon displayed here will appear in InfoTrac Web.

Library Holdings

Library Catalog 1


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

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

Find the library's call number & location for this periodi

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

1. Library catalog search command URL...

If you enter a search command URL, when patrons click on the link for library holdings in InfoTrac Web, they will initiate a dynamic search of your library catalog, and your catalog will be displayed with the search results.

You may enter up to 512 characters. The format of the command depends upon the requirements of your library catalog system. For example:

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

Type *[ISSN]* exactly as shown here; the actual ISSN from InfoTrac Web will replace it at the time of the search. Do not enter any actual ISSNs in the search command URL. For additional examples and how to determine the search command URL for your library, see the *Link to Holdings Technical Bulletin*, available at **www.gale.com** (see page 66) or from your Gale Representative.

2. Link text for the library catalog...

You may enter a description that 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.

3. Customized icon image...

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.

If you would like the icon image shown here to appear on the Citation List, make sure to set the citation style on the Preference Details screen to “Icon” (see page 24), otherwise the link text will appear.

Repeat Steps 1 through 3 for *each* catalog, if needed. You may specify up to three catalogs.

4. Uploading the ISSN holdings file...

[Click here to upload ISSN Holdings file now.](#)
Limit the holdings link to ISSN(s) listed in the holdings uploaded ISSN file.
 Library Catalog 1 Library Catalog 2 Library Catalog 3

Use the **Click here to upload your ISSN Holdings file now** link if you want the **Link to Holdings** link(s) to appear only for periodicals available in your collection. The holdings file must be an ASCII (text only) file listing the ISSN(s) of the journals, magazines, and newspapers your library holds in its

collection (submit only one file, regardless of the number of catalogs you specify).

Small holdings files under 500 bytes in size will not upload correctly. You will see the following error message: “Cannot find holdings file, please check the filename and resubmit.” Contact Gale Technical Support for assistance (see Appendix A for contact information).

You will be prompted to enter or browse for the path for the holdings file (e.g. c:\holdings\issn.txt), as well as for your password, as shown in the screen print below. 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 (Library Catalog 1, Library Catalog 2, etc.) for which you want InfoTrac Web to check the ISSN associated with the citation or article displayed against your text file of ISSNs. This will limit the display of the holdings link(s) to only those citations and articles that reference periodicals that your library actually holds. Otherwise the link(s) will appear for any citation/article that contains an ISSN, regardless if the ISSN is part of your holdings or not.

For more information, see the *Link to Holdings Technical Bulletin*, available at www.gale.com (see page 66) or from your Gale Representative.

Ingenta Settings

The next set of options pertains to the Gale Ingenta Combined Service. See Appendix B for a brief overview of the Gale/Ingenta feature.

<p>Ingenta</p> <p>Combined Service Activation for OneFile and Expanded Academic Customers only:</p> <p><input type="radio"/> Activate Gale/Ingenta Combined Service with e-commerce option</p> <p><input type="radio"/> Activate Gale/Ingenta Combined Service without e-commerce option</p> <p><input checked="" type="radio"/> Do not activate Gale/Ingenta Combined Service (default setting)</p>

1. Activating the Gale Ingenta Combined Service...

Click on *one* of the following radio buttons as desired:

- *To enable the InfoTrac Config and provide users with the ability to purchase digital copies of articles*, click on the radio button next to “Activate Gale Ingenta Combined Service with e-commerce option.” This is also known as the “pay-per-view” option.
- *To enable the InfoTrac Config without the ability to purchase digital copies of articles*, click on the radio button next to “Activate Gale Ingenta Combined Service without e-commerce option.”
- *To not include integrated Ingenta materials in InfoTrac Web*, click on the radio button next to “Do not activate Gale Ingenta Combined Service.” This is the default setting.

2. Entering Ingenta account information...

If you chose to activate the Gale Ingenta Combined Service, click the **Save** button at the bottom of the screen and you will be prompted to perform one of the following:

- If you already have an Ingenta account, enter your Username and Password in the fields provided and click **Continue**.
- Otherwise click the **Register with Ingenta** button and the Ingenta Web site will be displayed in a separate browser window allowing you to enter institutional registration information. Complete the registration form according to the instructions provided by Ingenta. Once you have completed registering a new account with Ingenta, enter your new Username and Password on the Ingenta Account Information screen in InfoTrac Config and click **Continue**.

You will be prompted to confirm your account information by clicking **Yes** or **No**. Clicking **No** will re-display the Ingenta Account Information screen where you will be able to re-enter your Username and/or Password.

The Gale Ingenta Combined Service is now active for this location. The **Manage My Ingenta** link will be available on the Summary screen (see page 8) allowing you to access the Ingenta Web site to view and update your profile settings.



If you have chosen not to activate the Gale Ingenta Combined Service and have finished modifying the options on the Location Details screen, click on the **Save** button at the bottom of the screen. You will be returned to the Locations entry screen.

Chapter 3

Reports and Administration

InfoTrac Config enables you to generate valuable reports about your InfoTrac Web installation. Available reports include journal reports, preference reports, and usage reports.

InfoTrac Config allows you to closely control who has access to the program and what those users may do. Users may be assigned privileges so that they can view or modifying existing settings or create new settings.

Generating Reports

You can only generate reports if you have been assigned that privilege. See “Controlling Access to InfoTrac Config” on page 50 for more information.

The **Reports** link in the left-hand Main Menu frame takes you to the Reports screen. This screen has options for configuring and generating reports about your InfoTrac Web installation.

Journal Reports
Download these reports to a spreadsheet program.

Database Name: **Cambridge Custom Newspapers**
Report Type: Active Journals (Journals currently in the database)
[Comma Separated Values](#)
Report Type: Planned Journals (Journals scheduled to be in the database)
[Comma Separated Values](#)
Report Type: Differences between Active Journal List and Planned Journal List
[Comma Separated Values](#)

Report Type: Available Journals
 Select the type of journal list you wish to download:

[Comma Separated Values](#)

User Interface (Preference) Reports
[Anytown Public Library Default](#), profile for InfoTrac-Custom
[Monumental Public Lib. Default](#), default profile for InfoTrac-Custom, *Library default*
[Nancy Faerber TEST pref](#), profile for InfoTrac-Custom
[Nancy Faerber default pref](#), profile for InfoTrac-Custom

User List
Administrator1, Monumental Public Library Admin, Create/modify access
Administrator2, Monumental Public Library Admin, Read-only access
faerber, Nancy Faerber,

Journal Reports Section

Use this section to obtain reports to monitor the content of your custom databases (see Chapter 4 for more information on InfoTrac Custom).

For Active/Planned Journal reports...

1. **Click on the Comma Separated Values link under the heading for the desired report type.**

You may select reports for:

- “Active Journals” – periodicals already assigned to a database
- “Planned Journals” – periodicals scheduled to be included in a database
- “Differences between Active Journal List and Planned Journal List”

2. Your browser will prompt you to save the file.

The report will be in comma-separated values (.csv) format. Reports in this format can be used with a spreadsheet or database program.

For Available Journal reports...

You may also download a list of all available journals in your subscription by selecting the type of journal list from the drop-down list (*i.e.*, “General Periodicals,” “Newspapers,” etc.).

1. Select a collection from the drop-down list.

2. Click on the Comma Separated Values link.

The report will be in comma-separated values (.csv) format. Reports in this format can be used with a spreadsheet or database program.

User Interface (Preference) Reports

The User Interface (Preference) reports let you view the settings of the available preference sets. Click on the linked name of the desired preference set. The settings for the selected preference set will be displayed in your Web browser. You can then use your browser to print or save the report.

User List

This section shows the user IDs that have been configured to use InfoTrac Config, along with their full name and description (if entered). See “Controlling Access to InfoTrac Config” on page 50 for more information on setting up users.

You have three options for capturing a list of the users:

- Click and drag to select the user list, then copy and paste it into a word processing program for printing.
- Print the entire Reports screen, which will include the user list.
- Save the entire Reports screen; this will include the user list in HTML format. Then open this in a word processor to extract the user list.

Usage Reports

You may choose usage and retrieval reports for the entire library or for a specific InfoTrac Web location. Usage and retrieval reports contain information on patrons' use of the system and on the articles they have retrieved.

You can also choose to view the report immediately, e-mail the report, or sign up to have a report e-mailed to you on a monthly basis.

Scroll down the Reports screen to see the Usage Reports links.

Usage Reports	
View your statistics online	
Generate immediate Usage and Retrievals Report	
Set parameters for monthly Usage and Retrievals Report	
<hr/>	
Library	View now
	E-mail
	Sign up for monthly
<hr/>	
Location	View now
doc_team	E-mail
	Configure monthly
<hr/>	
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The following links may be available for your consortium/library, as well as for each InfoTrac Web location (URL):

- **View now** – to generate and view a usage report online for a range of dates you select. See page 45.
- **E-mail** – to generate a usage report for a select range of dates and send it to up to one or more electronic mail addresses. See page 46.
- **Sign up for monthly** – to begin receiving a monthly usage report. See page 48.
- **Configure monthly** – to modify the parameters for an existing monthly usage report. See page 48.

Each of these options is explained below.

To configure and view reports immediately...

When you select a **View now** link under the “Usage Reports” heading (see the screen print on page 44), a Report Parameters screen is displayed. This screen allows you to select the dates and type of report you want to see.

1. **Select the begin and end date under the Period heading.**
2. **Choose a Report Type...**
 - Check **Usage Summary** to produce a report that summarizes activity for the selected period and location, including Total Sessions, Total Connect Time, Average Session Time, Total Views, Total Retrievals, Total Searches, and Total Turnaways.
 - Check **Usage by Database** for a report that summarizes the usage of each database separately for the selected period and location, including Sessions, Views, Retrievals, Searches, and Turnaways.
 - Check **Time-of-Day / Day-of-Week** for a report that details the number of sessions per hour and per day of the week for the selected period and location.
3. **Click on the Get Report button to generate the report.**
The report will be displayed in your Browser window.

To e-mail reports...

When you select one of the **E-mail** links under the “Usage Reports” heading (see the screen print on page 44), a Report Parameters screen is displayed. This screen allows you to configure the report and the e-mail address to which the report should be sent.

1. **Select the begin and end date under the Period heading.**

2. **Choose a Report Type...**

Select one or more report types. You must select at least one:

- Check **Usage Summary** to produce a report that summarizes activity for the selected period and location, including Total Sessions, Total Connect Time, Average Session Time, Total Views, Total Retrievals, Total Searches, and Total Turnaways.
- Check **Usage by Database** for a report that summarizes the usage of each database separately for the selected period and location, including Sessions, Views, Retrievals, Searches, and Turnaways.
- Check **Time-of-Day / Day-of-Week** for a report that details the number of sessions per hour and per day of the week for the selected period and location.

- Check **Retrievals by Citation** for a report showing usage by individual journal, publication, pamphlet, or database ranked in descending order by usage by retrievals.
- Check **Retrievals by Citation and Alphabetical Journal List** for a report showing usage by individual journal, publication, pamphlet, or database ranked alphabetically by source name.

3. Choose a Format for the report...

You may choose **ASCII**, **Comma Separated Values**, or **PostScript**. ASCII format can be easily opened in a word processor. Comma separated values format can be opened in a spreadsheet program or word processor. Postscript format allows additional formatting and can only be printed on a Postscript printer.

4. Choose a Compression method...

Compressing the report will allow quicker retrieval through your e-mail system. You may choose from **None**, **Zip**, or **PKZIP**. If you choose compression, select a method based on the decompression program you have available.

5. Specify whether the report should be sent as an attachment...

Your choice depends on personal preference and how your e-mail client handles attachments. Click **Yes** to try an attachment, then change the setting if having the report in the body of the e-mail will work better.

6. Type the e-mail address of the recipient.

Separate multiple addresses with commas.

7. Click on the Get Report button.

To configure monthly reports...

When you select the **Sign up for monthly** or the **Configure monthly** link under the “Usage Reports” heading (see the screen print on page 44), a Report Parameters screen is displayed. This screen allows you to modify the parameters for an existing monthly report and designate multiple e-mail recipients.

Monthly usage and retrieval reports contain information for the previous month on patrons’ use of the system and on the articles they have retrieved. A Usage Summary report is always included in the monthly report, which summarizes monthly activity for the selected location, including Total Sessions, Total Connect Time, Average Session Time, Total Views, Total Retrievals, Total Searches, and Total Turnaways. You may also specify additional information you want to see reported each month.

1. Specify whether you want to generate the report...

The **Do not generate this location report** checkbox allows you to configure the report without actually generating the report. To prevent the report from being produced for the location, click to place a checkmark in the checkbox and then click the **Submit Parameter Settings** button.

2. Choose a Report Type...

Select one or more report types. You must select at least one:

- Check **Usage by Database** to produce a section in the report labeled “MONTHLY DATABASE USAGE” that summarizes the usage of each database separately for the selected location, including Sessions, Views, Retrievals, Searches, and Turnaways.
 - Check **Time-of-Day / Day-of-Week** to produce a section that details the number of sessions per hour and per day of the week for the selected location.
 - Check **Retrievals by Citation** to produce a section labeled “JOURNAL RETRIEVALS” that summarizes retrievals for each journal, sorted by citation.
 - Check **Retrievals by Alphabetic Journal List** to produce a section labeled “JOURNAL RETRIEVALS” that summarizes retrievals for each journal, sorted alphabetically by journal name.
3. **Choose a Format for the report...**

You may choose **ASCII**, **Comma Separated Values**, or **PostScript**. ASCII format can be easily opened in a word processor. Comma separated values format can be opened in a spreadsheet program or word processor. Postscript format allows additional formatting and can only be printed on a Postscript printer.
 4. **Choose a Compression method...**

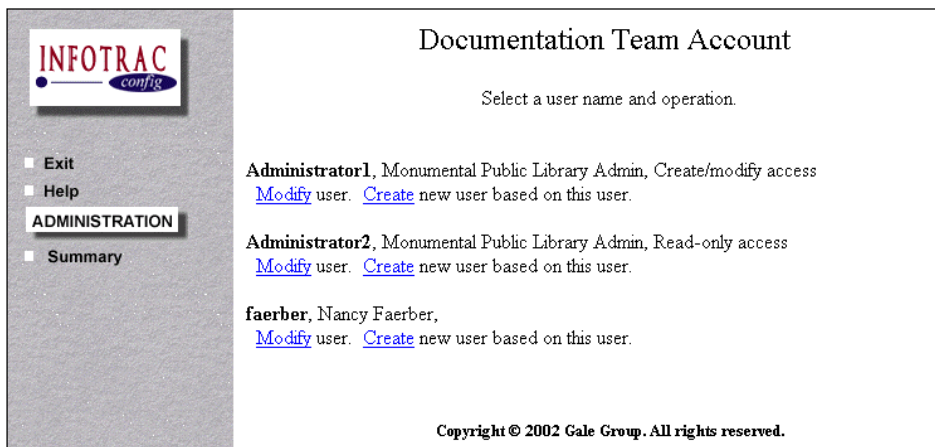
Compressing the report will allow quicker retrieval through your e-mail system. You may choose from **None**, **Zip**, or **PKZIP**. If you choose compression, select a method based on the decompression program you have available.
 5. **Type the e-mail address of the recipient.**
 6. **Repeat Steps 3 through 5 for up to two additional recipients.**
 7. **Click on the Submit Parameter Settings button to finish.**

The monthly report will contain a Glossary explaining such report terms as Sessions, Views, etc. at the end of the report.

Controlling Access to InfoTrac Config

When you access InfoTrac Config, the first screen you will see is the Authentication screen (page 6). You must enter a valid Username and Password in order to enter InfoTrac Config.

InfoTrac Config is initially delivered with a single user account. This user is called the primary user and is responsible for setting up user accounts for any other library staff that will have access to InfoTrac Config. User accounts are created through the **Administration** link in left-hand Main Menu frame. Clicking this link displays the Administration entry screen.



This screen shows the Usernames of those people that have been authorized to use InfoTrac Config. Links are embedded within the text for each user to allow you to:

- **Read** the privileges assigned to the user but not modify them.
- **Modify** the privileges assigned to the user.
- **Create** a new user account, using the selected account as a template.

The links that are displayed depend upon the privileges you have been assigned by the primary InfoTrac Config administrator. *Create* access is the highest level and automatically includes *Modify* and *Read* access.


User Administration Screen

After you select a link on the Administration entry screen, the User Administration screen is displayed.

The User Administration screen allows you to define differing levels of access – and therefore ability to make changes – for different staff members and for different areas of InfoTrac Config.

Privileges can be assigned for an entire class of items (e.g., “All Locations”) or to individual items within the class (e.g., a specific location).

Please Enter your changes and click on the "SAVE" button.



- Exit
- Help
- User Administration**
- Administration

User Name	
Full Name	Administrator1
Description	Monumental Public Library Admr
Description	Create/modify access
Password	<input type="text"/> (you may leave this field unchanged.)
Password Confirmation	<input type="text"/> (you may leave this field unchanged.)
Deactivate User	<input type="checkbox"/>

Note: Granting Modify or Create access implies granting Read access.

Database Privileges	
All Databases	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Modify
Location Privileges	
All Locations	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Modify
List of locations:	
faerber	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Modify
monumental	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Modify
Preferences Privileges	
All Preferences	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Modify <input checked="" type="checkbox"/> Create
List of preferences:	
Anytown Public Library	
Default	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Modify

To Create or Modify a User Account...

For each person or group of people for whom you want to allow access to InfoTrac Config, you create a user account at the Administration Details screen. That user account will have a password associated with it, which allows access to the designated features of InfoTrac Config. It's a good idea to write down the passwords, as they cannot be recalled through InfoTrac Config program. If you forget the password(s), contact Gale Technical Support (see Appendix A for contact information).

Please note that once a password is assigned to an account, that password will be necessary to either change or remove the password in the future.

1. **Click on the Administration button on the Main Menu in the left-hand frame.**

The Administration entry screen is displayed.

2. **To create a new user, select the Create link under the user account on which you want to base the new account. Then continue with Step 4.**

The User Administration screen is displayed.

The **Create** link is only available if the primary administrator has assigned you privileges for creating user accounts.

3. **To modify an existing user account, select the Modify link on which you want to base the new account. Then continue with Step 4.**

The User Administration screen is displayed.

The **Modify** link is only available if the primary administrator has assigned you privileges for modifying user accounts.

4. **On the User Administration screen, type a Username, Full Name, and Description for the user account.**

When you are modifying a user account, the Username field is not changeable.

5. **Type a password for the account in the Password field.**

6. **Re-type the password in the Password Confirmation field.**

7. **Optionally deactivate the user...**

The **Deactivate User** checkbox is used to prevent a user's access to InfoTrac Config without removing the account. This checkbox is available only if you have been assigned privileges for it.

8. **Assign Database privileges...**

You can assign the user with Read or Modify privileges by clicking the appropriate checkbox. You can choose to assign the privileges for all databases or by individual database.

Only Read and Modify privileges are available because only Gale can create databases.

9. Assign Location privileges...

You can assign the user with Read or Modify privileges by clicking the appropriate checkbox. You can choose to assign the privileges for all locations or by individual location.

Only Read and Modify privileges are available because only Gale can create locations.

10. Assign Preference privileges...

You can assign the user with Read, Modify, or Create privileges for all preference sets by clicking the appropriate checkbox. Alternately, you can choose to assign Read or Modify privileges to individual preference sets.

11. Assign Library Reports privileges...

You can assign the user with Read, Modify, or Create privileges for all reporting options by clicking the appropriate checkbox. You cannot assign privileges to individual reporting options.

12. Assign User Administration privileges...

You can allow the user to Read, Modify, Create, or Deactivate all user accounts by clicking the appropriate checkbox. Alternately, you can choose to assign Read or Modify privileges to individual user accounts.

Chapter 4

InfoTrac Custom Databases and Journals

If you do not subscribe to InfoTrac Custom databases, you will not use these features in the InfoTrac Config program.

In addition to enabling customization of the InfoTrac Web search interface, InfoTrac Config also helps you manage InfoTrac Custom database content.

Subscribers to InfoTrac Web who have subscribed to InfoTrac Custom databases can use the **Databases** link on the InfoTrac Config Main Menu (see page 7) to organize and display their collections. You can enter names and descriptions and assign graphical icons to accompany each collection in the database.

The **Journals** link allows you to view and modify the list of current periodical titles available in your InfoTrac Web databases. You can perform these tasks off- or online.

In order to work in the databases and journals areas, you must have been assigned the privileges in the Administration area of InfoTrac Config. See “Controlling Access to InfoTrac Config” on page 50 for more information.

What is InfoTrac Custom?

InfoTrac Custom is a database content option for InfoTrac Web subscribers. It allows you to create unique databases of indexed, full text, and imaged periodicals to meet special reference needs within your community. InfoTrac Custom databases are searchable with InfoTrac Web's customizable interface.

To build an InfoTrac Custom database, you select exactly what you need from the thousands of titles in Gale's library. For instance, a business school could build an InfoTrac Custom database to match the course curriculum. Or, a public library could build a general reference database suited to the special interests of its patrons. Any combination of titles is possible with InfoTrac Custom. Your sales representative can provide you with further details.

Searching InfoTrac Custom Databases

InfoTrac Custom databases appear on the InfoTrac Web Databases screen (if enabled), along with Gale's proprietary databases and other publishers' products that are offered through Gale. InfoTrac Web enables you to choose any combination of these databases, and then search them all through InfoTrac Web. Because this is all done through InfoTrac Web, the search methods and interface remain more consistent for your patrons.

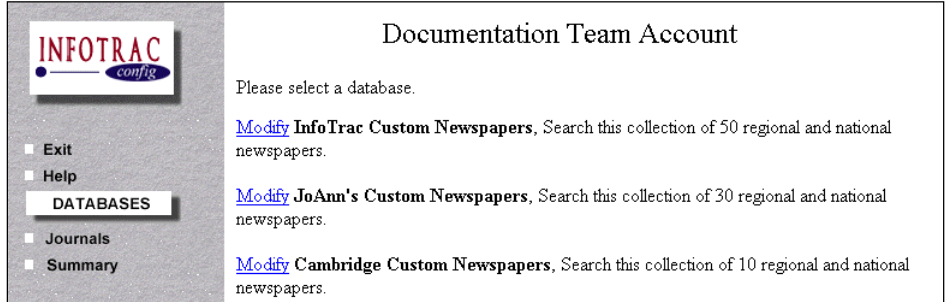
Configuring Databases

The **Databases** feature of InfoTrac Config allows you to configure how the InfoTrac Web custom databases, or "collections," that your library has purchased will appear on the Databases Page (menu) of InfoTrac Web (if enabled). For each custom database, you will be able to:

- Create a unique name and description
- Choose a graphic icon to represent the custom database which will serve as an alternate link into the database

Entering the Databases Area

Clicking the **Databases** link in left-hand Main Menu frame displays the Databases entry screen.



If you subscribe to only one custom database, the **Databases** link will take you directly to the Database Details screen, as discussed in the next section.

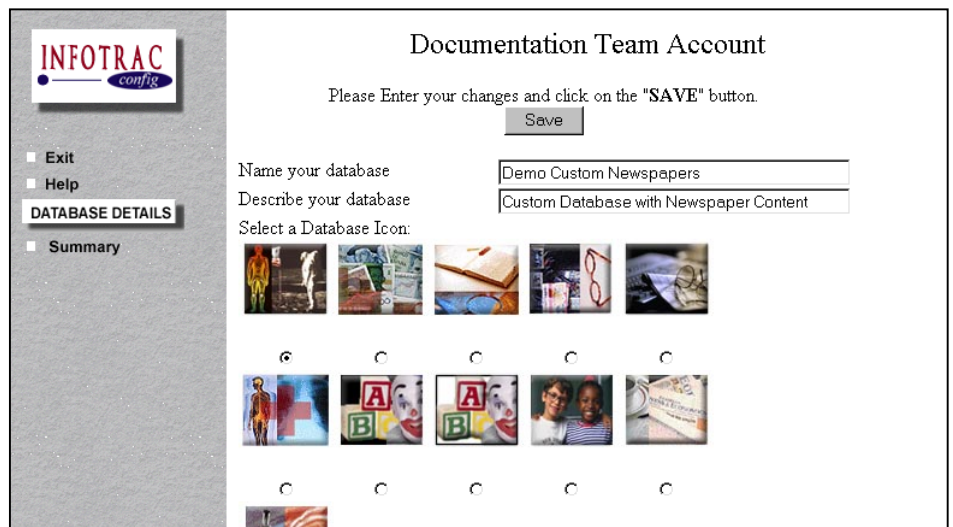
Depending on the privileges assigned to your Username on the User Administration screen (see “Controlling Access to InfoTrac Config” on page 50), you may be able to:

- **Read** a database configuration without modifying it
- **Modify** a database configuration

Only Gale can *create* new custom databases for you. Contact your Gale Representative for more information.

Database Details

After you select a link on the Databases screen, the Database Details screen is displayed.



You may enter the following information to configure a database:

1. Name the database...

Enter a unique name to identify the collection to your patrons.

2. Describe the collection...

Enter a longer text message to further identify the database, such as explaining the kinds of topics for which patrons can search in that particular database.

3. Optionally select a database icon...

A graphic gives patrons an image to associate with the database. The icon serves as an alternate link into the database when the “Display your database images” option is turned on using the Preference Details screen (see page 16). Academic, business, children’s, general, health, newspaper, and science databases are all represented, though the choice is yours as to which icon you assign to which database. To add an icon, click on the radio button below one of the images.

4. Click on the Save button near the top of the screen.

You may return at any time to modify database names, descriptions, and icons.

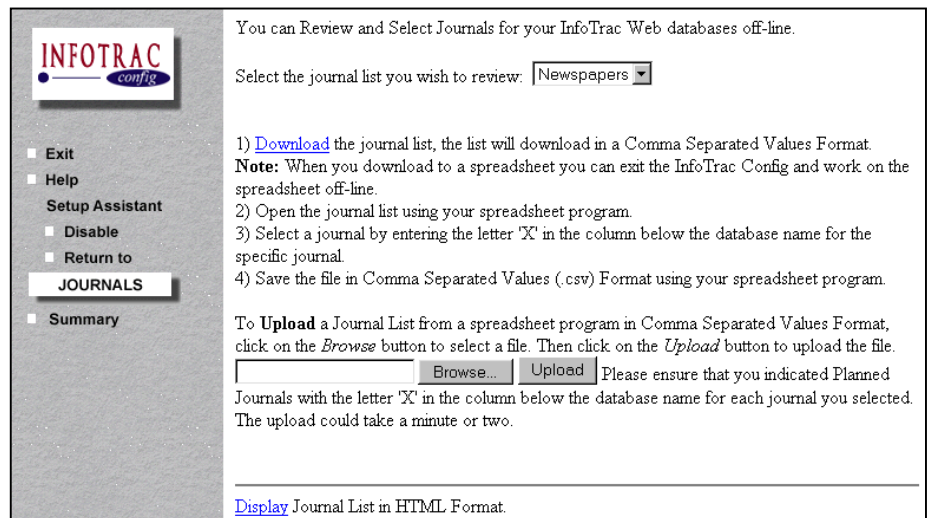
Changes made to journal selections in InfoTrac Custom databases are implemented once per day. If you make journal changes twice in a single day, those changes will be implemented in sequence over two days.

Setting Up Journals

The **Journals** feature in InfoTrac Config lets you choose various ways of viewing and modifying the contents of your custom databases. It allows you to:

- View a list of the current journal titles in each of your custom databases.
- Modify the list of journal titles in each of your custom databases. Modifications can be made directly online, or offline by downloading the title list file and uploading it again after making your changes.

Select the **Journals** link from the InfoTrac Config Main Menu in the frame at the left to access the Journals screen.



Modifying Databases Offline

1. Choose the type of database you want to work with...

Select the database type from the drop-down list at the top of the Journals screen. You might see **Newspapers** or **General Periodicals** or both.

2. Click on the Download link.

A list of journals will download to a file in Comma-Separated Values (.csv) format.

3. Import or open the downloaded file in a spreadsheet program.

4. Add journals as desired...

To add a journal to a specific database, place an “X” in the appropriate column of the spreadsheet.

In the following sample spreadsheet, all three journals will be included in the “General Interest” database. The *ABA Banking Journal* will be in both the “Business” and “General Interest” databases. None of the journals will be listed in the “Arts” database.

Arts Database	Business Database	General Interest Database	Selectable Journal Name
	X	X	ABA Banking Journal
		X	Harper’s Bazaar
		X	Southern Medical Journal

There are columns to the right of the journal name column, not shown here, for ISSN, dates of indexing and full-text coverage, and other journal information.

5. Remove journals as desired...

To remove a journal from a specific database, delete the “X” from the appropriate column of the spreadsheet.

6. When you’re finished, be sure to save the spreadsheet in Comma-Separated Values format.

7. Log back into InfoTrac Config and go to the Journals screen.

8. Enter the name of the file in the space provided.

Alternately, you can click on the **Browse** button to find the file on your disk. The filename you select will be placed into the field.

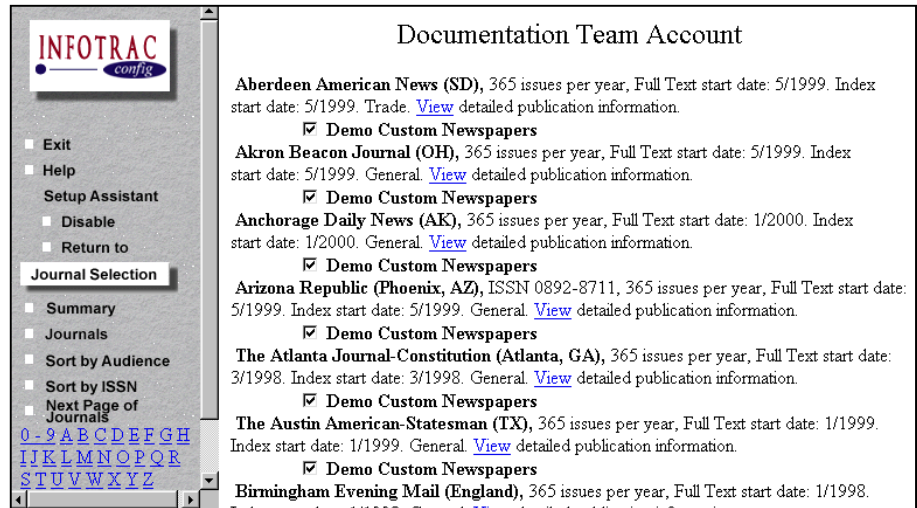
9. Click the Upload button.

The file will be transferred to the Gale server and your changes will be recorded.

Changes made to journal selections in InfoTrac Custom databases are implemented once per day. If you make journal changes twice in a single day, those changes will be implemented in sequence over two days.

Modifying Databases Online

To make changes to a database online, select the **Display** button on the main Journals screen. This will display a Journal Selection screen like the one pictured below.



Fifty journals are displayed on each Journal Selection screen. Using the options in the left frame of the window, you can choose to display the journals using the **Sort by Audience** or **Sort by ISSN number** buttons. By default, journals are sorted alphabetically, and the letter links let you go straight to the beginning of the list for that letter. You may also click **First Page of Journals**, **Next Page of Journals**, and/or **Previous Page of Journals** in the left-hand frame to move through the list of periodicals.

Each journal entry includes the journal name, its International Standard Serial Number (ISSN), and its frequency of publication:

Los Angeles Times, ISSN 0458-3035, 365 issues per year, Full Text start date: 1/1996. Index start date: 1/1996. General. [View](#) detailed publication information.

If the journal is available with full text, the start date of full-text coverage will be shown. All journals have an index start date, which indicates when coverage starts for any kind of records. For any given journal, you might also see full-text and index start dates for backfile coverage.

A *backfile* is a database of information published before the current file. In most standard InfoTrac Web databases, the backfile is already integrated with current data. See the *InfoTrac Web User's Guide* for more information.

Following the start dates is a word that indicates the audience (in general) of the journal. This is followed by a **View** link that lets you see detailed information on the journal.

In order to add a journal to the database, click the checkbox under each Journal name. Click on the same checkbox again to reverse the action and remove an assigned journal.

There are no “Save” buttons on the Journal Selection screens. When you leave a page, your changes will be recorded. The journal selection changes you have made are now considered *pending*. To update your custom databases with journal changes you have made, go to the Summary screen (see page 7) and click on **Apply Pending Journal Changes** for each custom database that you’ve modified.

Appendix A

Customer Support

Gale is committed to supporting its customers throughout the lifetime of their InfoTrac Web subscriptions. Not only do we have a staff of customer and technical support representatives trained to answer all your questions, but we have also employed the latest technologies to provide fast access to the help you need.

Please feel free to contact us at any time regarding your InfoTrac Web subscription. To expedite your requests, it helps to have your customer number in hand (if you do not know it, a representative will help you identify it).

Contacting Us

For U.S. and Canadian Customers...

**1 - 800 - 877 - GALE (4253)
248 - 699 - 4253**

To e-mail all Customer Support 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)
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 650-378-5442**

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

For International Customers...

Send e-mail to Technical Support or Web Installations at
globaltech@gale.com.

Asia	Australia & New Zealand
Thomson Asia Pte. Ltd. No. 3, Jalan PJS 7/19 Bandar Sunway 46150 Petaling Jaya Selangor Darul Ehasan Malyasia <i>Phone: + 60 3 5636 8351/8352</i> <i>Fax: + 60 3 5636 8302</i> See www.gale.com/world for a listing of additional branch offices in Asia.	Nelson Thomson Learning (Australia) 102 Dodds Street Southbank, VIC 3006 Australia <i>Phone: +61(0) 3 9685 4111</i> <i>Fax: +61(0) 3 9685 4241</i>
Germany & Eastern Europe	Europe, Africa & Middle East
K.G. Saur Verlag GmbH A Thomson Learning Company Ortlerstrasse 8 81373 Munich Germany <i>Phone: + 49 (0) 89 76902-172</i> <i>Fax: + 49 (0) 89 76902-150/250</i>	Gale High Holburn House 50/51 Bedford Row London, WC1R 4LR United Kingdom <i>Phone: + 44 (0) 20 7067 2500</i> <i>Fax: + 44 (0) 20 7067 2600</i>
Latin America	
Thomson Learning Iberoamerica Seneca No. 53 Colonia Polanco Mexico, D.F. Mexico C.P. 11560 <i>Phone: + 52 52 81 29 06</i> <i>Fax: + 52 52 81 26 56</i>	

Internet

Product news and views

Gale can be accessed via **www.gale.com**. International customers can use: **www.gale.com/world**.

Learn about our products and services by viewing product Web sites, product fact sheets, catalog entries, excerpts of reviews from news media, and sample pages and tables of contents. You can even order Gale print products online.

Download product documentation

User manuals and technical bulletins related to InfoTrac Web and InfoTrac Config are available in PDF format. Go to **www.gale.com** and click **Customer Service and Education**, then click **Technical Information**. Here you'll also find FAQs and the Software Center.

Timely resources

We've developed complementary information centers on gale.com. Countless librarians, patrons, teachers, and students have found our *Black History Month*, *Women's History Month*, *Celebrating Hispanic Heritage*, and *Poet's Corner* to be helpful and informative. Find biographies, timelines, quizzes, and more – absolutely free.

In addition you will see *Gale's Literary Index*, a master index to the major literature products published by Gale. It combines and cross references thousands of author names and titles into one source, providing quick and easy access to a guide to more than 100 literature products from Gale and the imprints Charles Scribner's Sons, St. James Press, and Twayne Publishers.

And be sure to check out *How to Cite InfoTrac and GaleNet Sources*, an online guide that provides examples of citation information for articles and documents retrieved from the InfoTrac Web and GaleNet databases.

Stay in touch

Visit **www.gale.com** to send us a message, join an e-mail list, search our online catalog, or review our tradeshow schedule. Bookmark it today!

Customer Notification Service

The Customer Notification Service is a primary means of notifying subscribers of news regarding their services, such as dates and times that server maintenance will be performed. Therefore, you will want to appoint a specific person within your library to monitor this list.

The notification service enables you to communicate with Gale and other InfoTrac subscribers by posting your own messages. All subscribers to the list receive messages that you post, and vice versa.

To subscribe...

1. Address an e-mail message to the following address:

listproc@gale.com

E-mail must be in plain text format. Leave the subject line blank.

2. In the body of the message, type the following text on one line:

subscribe infotrac2000-L [*your first name*] [*your last name*]

Do not use brackets in your message.

For example: **subscribe infotrac2000-L James Taylor**

3. Send the message.

You will receive e-mail confirmation of your subscription within 30 minutes, along with instructions for posting messages and unsubscribing.

Appendix B

Implementing Special Features

This appendix provides an overview of the following new or enhanced features available in the latest release of InfoTrac Web and InfoTrac Config:

- Link to Holdings
- OpenURL
- Gale Ingenta Combined Service

Linking to Your Library Holdings

With the Link to Holdings feature you may allow your InfoTrac Web patrons to link to periodical holdings information at specific points during their InfoTrac Web searches:

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

In this way, a patron may find a reference to a particular journal, magazine, or newspaper and check immediately if it is available at your library. You may make up to three of your library catalogs of periodical titles available.

The Link to Holdings feature allows you to offer dynamic, real-time access to your periodical holdings, provided your library catalog meets certain requirements. You may choose to limit the holdings display to actual library holdings by uploading to Gale a text file of International Standard Serial Numbers (ISSNs).

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

For detailed information on the Link to Holdings feature, including step-by-step instructions with screen prints, system requirements, and Frequently Asked Questions (FAQs), see the *Link to Holdings Technical Bulletin* available at www.gale.com (see page 66) or from your Gale Representative.

- 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 (see pages 24 through 29) 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 (see page 35) 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

Linking to Your OpenURL Server

The OpenURL reference linking feature (formerly known as SFX) allows your InfoTrac Web patrons to search for the full text of an article or for additional, relevant information pertaining to the citation through electronic resources utilized by your library. For example, depending on your OpenURL service, patrons may search another library catalog, look up an e-mail address, or initiate an Internet search using a search engine such as Google or Yahoo.

You may provide OpenURL links on the following screens within InfoTrac Web:

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

You have the option of specifying your own icon and descriptive text for the OpenURL link.

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

For detailed information on the OpenURL linking feature, including step-by-step instructions with screen prints, system requirements, and Frequently Asked Questions (FAQs), see the *Enabling OpenURL Technical Bulletin*, available at www.gale.com (see page 66) or from your Gale Representative.

1. **Use the Preference Details screen (see pages 24 through 29) to enable OpenURL functionality for each location where you want to deploy reference linking.**

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

- the Citation List
 - the Article screen
 - the Mark List
2. **Use the Location Details screen (see page 33) to specify additional information for each location where you enabled the OpenURL feature.**
 - Enter the OpenURL server base URL for your library's OpenURL server
 - Enter the descriptive text you want patrons to see with the OpenURL link
 - Optionally enter the URL for a customized OpenURL icon you wish to use instead of the default icon provided by InfoTrac Config

Enabling the Gale Ingenta Combined Service

The Gale Ingenta partnership provides your library with a new solution for accessing electronic scholarly journal subscriptions. The Gale Ingenta Combined Service allows you to integrate your library's core periodical content and its Ingenta e-journal subscriptions into one interface: InfoTrac Web. You can choose to activate an e-commerce (or "pay-per-view") option giving patrons the ability to buy individual articles in digital format.

Gale Ingenta Combined Service provides the following benefits:

- Patrons use a single interface to search across a wide range of full-text scholarly materials from multiple publishers and to link to e-journals from thousands of Ingenta academic and professional titles, based on your institution's subscriptions.
- Patrons can access the content from campus or remote locations, enabling distance learners to use *InfoTrac OneFile* or *Expanded Academic ASAP* as a virtual library of periodical content.

Once the Gale Ingenta Combined Service is activated, users will see InfoTrac Web and Ingenta citations integrated on the Citation List with the Ingenta

citations shaded to distinguish them from native InfoTrac Web citations. When Ingenta with the e-commerce (or “pay-per-view”) option is activated, users will see a link that they can click to purchase a digital copy of the selected article.

To activate the Gale Ingenta Combined Service you simply configure the “Ingenta” section of the Location Details screen (see page 38) in InfoTrac Config for each desired location. Here you will specify if the e-commerce option will be used or not. When you activate the Gale Ingenta Combined Service, InfoTrac Config will prompt you to enter your existing Ingenta account information or register a new account with Ingenta.

For detailed information on the Gale Ingenta Combined Service, including step-by-step instructions with screen prints, how to register with Ingenta, and Frequently Asked Questions (FAQs), see the *Enabling the Gale Ingenta Combined Service Technical Bulletin*, available at www.gale.com (see page 66) or from your Gale Representative.

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