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SilverPlatter Holdings Options

HCU/GR 12/23/98

SilverPlatter offers customers two options for providing local holdings information in conjunction with SilverPlatter bibliographic records:

- The Holdings Conversion Utility, or HCU, which utilizes a static file of holdings information to display a holdings message right along with the SilverPlatter bibliographic database. It is supported across all SPIRS clients, in both stand-alone and ERL environments.
- The WebLink to Holdings solution, which requires that the library have a Web-compatible OPAC accessible via a static URL, and with an ISSN/ISBN index. This solution is only available with our WebSPIRS v. 4X gateway.

This document contains general information about using library holdings information with SilverPlatter databases as well as specific information about converting serial holdings files for use with SilverPlatter retrieval software and databases and setting up the necessary configuration options for activating the WebLink to Holdings.

Note that the SPLHA option for providing holdings information within a limited set of databases (PsycLit; ClinPsyc, Medline (all versions); CINAHL; HealthStar; Wilson Readers' Guide (all versions); and RNDEX) will be supported through 12/99, following which SPLHA users will be expected to transition to HCU, using tools which SilverPlatter will provide to assist in this migration.

1. Holdings Conversion Utility (HCU) Overview

The Holding Conversion Utility, or HCU, is a utility which converts an ASCII or MARC file representing the library's serials holdings into a set of SilverPlatter holdings files, which are then used to display messages describing the library's holdings for a particular journal title. The HCU utility may be run on a Windows 95, 98 or Windows NT workstation; or on SilverPlatter-supported Unix platforms (i.e. SCO, Solaris, AIX). The resultant files may then be installed on an ERL server or network server or, in a stand-alone situation, on the workstation running the SilverPlatter software.

The SPIRS retrieval client checks these holdings files before displaying SilverPlatter records and displays the appropriate holdings message along with the bibliographic information for the journal cited, based primarily on an ISSN match. In some cases, the title will be used as a secondary matching key. HCU supports the display of holdings information within any standard ISSN-based SilverPlatter database. Libraries can explicitly exclude specific databases from displaying HCU-generated holdings messages if desired.

In an ERL 4 environment, the message file can accommodate a maximum of 64000 entries, and there is no length limitation on the individual messages. However, with ERL v.2.09.5 or ERL 2.11 systems, the entire .LHM file cannot exceed a total length of 64K. Holdings messages can include locations, call numbers, links to websites, and other holdings information.

1.1 Requirements

In order to take advantage of the HCU solution, the library must be able to extract or create an electronic file of serials holdings. The file can be in either of the following formats:

- an ASCII delimited file, containing the following fields: ISSN/Journal Title/Holdings Message. Any field delimiter may be used to separate the fields, although a <tab> is the recommended delimiter.
- a MARC file. The library has the ability to specify the fields and subfields from which the required data (ISSN, title, message text) will be mapped. HCU's MARC conversion capabilities can accommodate mapping from holdings data embedded in the bibliographic record, or from separate holdings records which are linked to the bibliographic record

The library must have sufficient room on the server or workstation to accommodate the storage of the resultant HCU-generated files. The HCU outputs three files, and SPIRS uses these files to find matches on ISSNs and, in some cases, journal titles. You should expect that the combined minimum size of these files will be equal to or slightly greater than the size of the serials file which serves as input to the HCU process.

The HCU has been designed as part of ERL Release 4.0 from SilverPlatter, which includes new ERL server software and new SPIRS clients. Although the HCU is optimized to work with ERL server v. 4.0 or v. 4.0 standalone systems, it may also be used with earlier versions of the server as well as earlier versions of the clients and standalone systems: WebSPIRS, WinSPIRS, and MacSPIRS. Information regarding which versions are supported; as well as the functionality which is only supported in the newest versions of the ERL server and the standalone clients are detailed throughout this document as applicable.

The Holdings Conversion Utility may be run on the following platforms to convert serials files to SilverPlatter holdings format:

- Windows 95
- Windows 98

- Windows NT 3.51 and above
- SCO OpenServer 5
- Solaris v2.5+
- AIX v4.2

NOTE that the platform on which you run the HCU utility to generate the SP-formatted holdings files is totally independent from the platform on which you install the resultant files. That is, for example, you may run the HCU utility on a Windows NT platform, but then install the HCU-generated files on a Unix, Macintosh, 16-bit Windows or DOS platform.

1.2 HCU Holdings Task Flow

The general task flow for using HCU to enable holdings messages for SilverPlatter databases is listed below. For platform-specific instructions and more detail on each step, refer to the appropriate section of this document.

1. Output or obtain a file of your library's serial holdings in MARC format or in delimited ASCII format.
2. Copy or ftp the file to the machine where the HCU conversion utility will be run (e.g. Windows workstation; ERL server)
3. Using your serial holdings file as input (and any fixup file you may have created) , run the HCU to create the SilverPlatter format holdings files.
4. After HCU has completed processing the input file, copy or ftp the resultant SilverPlatter formatted holdings files to the ERL server or the client workstation, depending on how your site accesses SilverPlatter databases.
5. If necessary, set up the retrieval client(s) to display holdings information.

1.3 Input File Formats

The most critical aspect to using the HCU utility successfully is to ensure that the serials holdings file which you use as input conforms precisely to the requirements described in this section. There are various ways that you may be able to obtain this file: as a file extracted from the OPAC; a file prepared as input to a serials union list project which your library participates in; from your library's subscription agent; or by inputting your serials holdings information into a file created using any word processing; spreadsheet; or database program, such as Word or Excel.

The serial holdings file you use as input to HCU should contain the ISSN, serial title, and the associated library holdings message for that title. Your serials holdings file may be in either MARC format or delimited ASCII format in order for it to be processed by HCU.

There may be records within your input file which contain duplicate ISSN numbers. For example, if you subscribe to the same journal in multiple formats and you create separate records for each format. You may choose to have HCU concatenate the messages from each occurrence of a record with the same key; or you may choose to have HCU ignore subsequent records with the same key as one already processed. You can indicate the desired behavior within the HCU interface.

SilverPlatter recommends that you begin by generating a small sample file, using the method which you plan to use for the entire file, and run it against the HCU utility to see if there are any discrepancies.

If you indicate that any subsequent records with a duplicate are to be ignored, the duplicate keys will be reported in the HCU log.

1.3.1 Starting with a MARC Input File

If you can obtain a file of your serials holdings in MARC format, for example by extracting the file from your OPAC, the HCU utility allows you the flexibility to designate the fields from which the required information should be mapped. Holdings information may be mapped from fields embedded in the bibliographic record, or may be mapped from fields within separate holdings records contiguous with the main bibliographic record and linked to it through the 004 tag in the holdings record.

HCU provides default templates based on MARC standards in common usage for ISSN and Title information. You may change these values if necessary. You may then designate up to 5 MARC fields and subfields from which holdings message information will be mapped. For message information, you need to choose textual fields containing information such as summary holdings information; location information; call number, etc. Or you may designate default message text within the HCU interface to display with some or all of your journal titles.

For MARC format input files the HCU provides the following options:

- choose either MARC or OCLC Serials Union List format and use the default settings
- choose either MARC or OCLC Serials Union List format and change some or all of the default settings
- or define a new MARC format definition

The HCU converts the MARC input file to ASCII format and converts the ASCII format to the SilverPlatter holdings format.

In order to be processed by HCU, the MARC records in your file must conform strictly to MARC standards. Accurate information in the header regarding length bytes is of particular importance. The Library of Congress makes available tools which may help you to analyze any problems you experience when attempting to process the file using HCU. The following website offers information on these tools (MARCMakr and MARCBreakr) and how to obtain them: <http://lcweb.loc.gov/marc/marcutil.html>. For example, the MARCBreakr utility can take a MARC record in Marc Exchange format (Leader, Directory etc) and display it in eye-readable form.

1.3.2 Starting with an ASCII Input File

You may also use an ASCII delimited text file of your serials holdings as input to HCU. For ASCII format input files, each record in the file should contain an ISSN, journal title, and holdings message text with a delimiter between each.

In creating the ASCII file, you must observe the following rules:

ISSN number must be input in the following format: NNNN-NNNX. That is, it must be a string which consists of 4 numeric characters followed by a hyphen followed by 4 more characters, the first 3 of which must be numeric. The final character may be any numeric character or an <X>. HCU will insert a hyphen following the fourth character in the string if it's not present in the data.

The journal title in your input file should be the standard title for that journal. The input from this field is limited to 82 or fewer characters. Data in excess of 82 characters in the title field will be truncated by HCU.

The holdings message can be either a textual message, or, in an ERL 4 environment, may incorporate a hotlink constructed as described in Section 1.4.2. In an ERL 4 client-server environment, the message itself may be of unlimited length (however, no more than 64,000 total messages can be accommodated). In a pre-ERL 4 environment, the entire file may not exceed 64K, so message length is constrained by the number of records in the file. If you are using the

holdings files in an ERL Release 4 environment, you may embed a URL within the holdings message to enable linking from the SilverPlatter record to the corresponding web address (refer to section 1.4.2 for details)

Delimiters are required to separate each field. Each record must contain 2 delimiters. The delimiter must clearly mark the end of one field and the beginning of the next. You can use any character as a delimiter, though a <tab> is recommended. Using delimiters other than tab could result in erroneous processing of your input file. For example, if you choose a common punctuation mark such as a comma as a delimiter, then any occurrence of that punctuation mark within the title or within the message text will be interpreted by HCU as a delimiter. The occurrence of more than 2 delimiters within a single input record will result in a syntax error, and that record will not be processed. An entry will be made to the log file. You must utilize the same delimiter throughout the file.

You must use a standard **line-feed character** between each record.

It is possible to create valid records which do not contain an ISSN or which do not contain a journal title (the record must contain one or the other). In these cases, you **MUST** include the delimiter to mark the place of the field for which there is no data (i.e. each record must contain 2 delimiters even if there is not data present in each of the expected fields).

A message will be written to the log file to identify records which contain no ISSN or no title.

You may also have records in your input file which contain no message text. Refer to Section 1.4.1.1 for information on creating default messages to display for journals for which there is no journal-specific message.

You may be able to extract an ASCII file in the appropriate format from your OPAC. Alternatively, an ASCII or text (.txt) file can be created by a variety of word processors, text editors, spreadsheet applications, etc. When you save the file, be sure that you are saving a plain text file. For example, with Microsoft® Word or Microsoft® Excel select "Text Only (*.txt)" or "Text (Tab Delimited) (*.txt)", respectively.

A tab-delimited input file might look like the following:

```
0001-4079      Bulletin of the Academy of National Medicine      This title is available in
the University Medical Library.
1058-4838      Clinical Infectious Diseases      This title is available in the University
Medical Library.
```

If you want various segments of your message to display on separate lines within the SilverPlatter record, and you are using an ERL v. 4 server or v.4 stand-alone system, you can specify line feeds in the holdings message by entering <\n> at the end of the line to designate a desired line-feed; for example:

```
0001-4079      Bulletin of the Academy of National Medicine      This title is available in
the University Medical Library.\nCurrent issues are located in the Reading Room. The
past ten years are on microfiche.\nSpeak to a librarian for assistance.
```

This message will display in the SilverPlatter record as:

```
This title is available in the University Medical Library.
Current issues are located in the Reading Room. The past ten years are on microfiche.
Speak to a librarian for assistance.
```

NOTE: the ability to use <\n> to specify a linefeed can only be used with ERL server v.4+ or v.4+ standalone systems. If you include <\n> in any of your messages and then display those messages in a pre-ERL 4 server environment or pre-ERL 4 stand-alone system, the \n will appear as part of the text of the message.

1.4 Holdings Message Variations

1.4.1 Using Default Holdings Messages

There are 2 main categories of default messages - those which are specified for display with journals which are in the library's collection; and those which are specified for display when the journal is not held or when some other condition precludes the identification of an appropriate message.

For journals which are in the library's collection, default messages can be designated to display instead of journal-specific messages for some or all of the journals in the library's collection. You may also designate a default "introductory" message, which will display preceding each journal-specific message

A hotlink constructed as specified in Section 1.4.2 may be incorporated into your default message text. Remember, however, that the hotlink capability may only be used in conjunction with an ERL v.4 server or ERL v.4 stand-alone system.

Specific types of default messages can be created to address these and other conditions, as outlined below.

1.4.1.1 Default Messages for Journals Held in the Library's Collection

Default holdings messages can be used in place of journal-specific holdings messages for all or some of the journals which are identified in your MARC or ASCII input file. You may also specify a default introductory message, which will display preceding each journal specific message as displayed in a SilverPlatter record.

You can specify a default message to apply to journals which are in your library's collection and for which you have NOT specified an explicit message for that journal. These messages will display in the case where there is match between the ISSN or title key in the SilverPlatter record and an entry in your library's holdings file, and for which no explicit message has been entered for that journal in your holdings file. You can use this message to substitute for a journal-specific message for all or some subset of your journals.

For example, you may wish to write a generic message which displays for every journal in your collection, or perhaps for some subset of journals for which there are significant gaps in your holdings, such as:

"Library has only occasional volumes of this journal. Check print-out for details."

In writing your introductory message, do not include the double quote <"> character anywhere in the message. A single quote <'> may be used instead.

A hotlink constructed as specified in Section 1.4.2 may be incorporated into your default message text, for example if you wish to have your users link to a website which contains journal holdings information, or perhaps the full text of a particular journal. Remember, however, that the hotlink capability can only be used in conjunction with an ERL v.4 server or ERL v.4 stand-alone system.

If you wish to input default message text, you can do so within the HCU user interface. Default messages entered within the user interface must be re-entered each time HCU is run.

You may also enter default message text directly into the holdout.cfg file, which is installed with HCU. Default message text entered into the holdout.cfg file is saved and re-used each time HCU is run. If you specify default messages in the holdout.cfg file, you do not need to specify them using the HCU interface. However, if you do specify default messages using the interface, they will override any default messages in the holdout.cfg file for that particular HCU conversion session.

The combined total length of both types of default message text for journals held in the library's collection cannot exceed 900 characters.

1.4.1.1.1 Introductory Text to Precede Body of Message

You can create a message that will appear automatically as an introductory message preceding each of the journal-specific holdings messages included in your holdings file. The default introductory text only displays when the software finds a match between the SilverPlatter bibliographic record and a record in your holdings file. For example, if the data which you map from your MARC files consists solely of call number information for each journal in your library, you might want an introductory message to display preceding the extracted call number information;

e.g.: "This journal can be found at:"

In writing your introductory message, do not include the double quote ">" character anywhere in the message. A single quote '<' may be used instead.

A hotlink constructed as specified in Section 1.4.2 may be incorporated into your default introductory message text. Remember, however, that the hotlink capability can only be used in conjunction with an ERL v.4 server or ERL v.4 stand-alone system.

You may create both a default introductory message and default messages to display in place of journal-specific message text. You may also utilize the introductory message in conjunction with the button which displays for the WebLink to Holdings (refer to Section 2 of this document for information on the WebLink to Holdings).

The combined total length of both types of default message text for journals held in the library's collection as entered into the HCU user interface may not exceed 900 characters.

1.4.1.1.2 Using the holdout.cfg File to Create Default Messages

You may also enter default introductory text directly into the holdout.cfg file. Default introductory text entered into the holdout.cfg file is saved and re-used each time HCU is run. If you specify default introductory messages in the holdout.cfg file, you do not need to specify them using the HCU interface. However, if you do specify default introductory messages using the interface, they will override any default messages in the holdout.cfg file for that particular HCU conversion session.

If you are using the holdout.cfg file to enter the text of the introductory or default messages described above, do so as follows:

The holdout.cfg file allows for 4 lines of entry, in any order, the text of which must be preceded by one of the following indicators: I; D; B; or H. NOTE that the B and H indicators are used ONLY by the Unix version of HCU. Customers running the HCU utility on a Windows platform must enter MARC tag information in the Windows interface.

I: enter text for introductory message to precede body of holdings message following this tag

D: enter text for default message for journals in library's collection here following this tag

B: identify MARC bibliographic record tags to be mapped to the ISSN and title fields of the SilverPlatter holdings file. **NOTE:** used only by HCU/Unix

H: identify MARC record tags to be mapped from the MARC record to the message field of the SilverPlatter holdings file. **NOTE:** used only by HCU/Unix

The I/D/B/H: tag should always be present; the rest of the line may be blank.

An example :-

I: This material is located at the following location:

D: Refer to printed list of serials holdings located at the Reference Desk

B:22,245

H:852/abhl,866/az*

Newlines are not allowed on any of the 4 lines, but internal </n>'s are OK.

The entire length of all information entered into the holdout.cfg file may not exceed 1000 characters. In writing your introductory message, do not include the double quote "> character anywhere in the message. A single quote <'> may be used instead.

1.4.1.2 Default Messages When There is No Match in Library's Holdings File

With the version 4.0 ERL server or v. 4.0 standalone systems, you may choose to display default messages when there is no match between the ISSN (or title) in the SilverPlatter bibliographic record and the records in your holdings file. There are several reasons why this situation may occur. The most obvious one is the case where the library does not own the journal cited in the SilverPlatter record. However, other situations, as outlined below, may also result in no match.

You can activate and edit some or all of these default messages in the ERL server v.4.0, within the coretags.cfg file; or, for stand-alone systems, in the .ini file of v.4.0 WinSPIRS or MacSPIRS 4.0 (when it is available). The coretags.cfg file is located at: sprout/dbase/coretags.cfg.

Note: These messages may seem to display erroneously; for example in cases where there is a discrepancy between the ISSN in the SilverPlatter bibliographic record and the ISSN as converted from your serials file or when there is no ISSN in the SilverPlatter record. See the section on the using the Fixup File to address some of these situations.

The specific circumstance for which you may choose to utilize default messages are as follows:

!50 Holdings files missing or incomplete

!51 This database contains no valid holdings keys (i.e. there is no field containing ISSN number or title in this database)

!52 Holdings for this database family disabled (i.e. the database family has been disabled in your configuration settings)

!53 No holdings key field in record (i.e. the displayed record does not contain an ISSN or title field).

!54 No holdings key found in fields (i.e. the record contains an ISSN or a title field, but there is no usable data in the field)

!55 The holdings key in this record is invalid (i.e. the ISSN number doesn't conform to the required format NNNN-NNNX)

!56 Holdings index file corrupt - rebuild

!57 No holdings information for this record (not held) (i.e. there is no ISSN number and no title in the SilverPlatter holdings file which your library generated which corresponds to the ISSN number or title in the SilverPlatter record being displayed)

For each circumstance for which you want a default message to display, you need to activate the message by removing the semi-colon (;) at the beginning of the desired line. Otherwise, no message at all will display for the corresponding situation. You may also, if desired, edit the text associated with each condition, rather than using the default text as displayed.

With the exception of !57, you may want to activate the other messages only for diagnostic purposes.

1.4.2 Using URLs in Holdings Messages

You can incorporate links to web sites as a part of your HCU messages by embedding URLs in your holdings messages and/or your default messages. Multiple links may be embedded into a single holdings message. WebSPIRS 4.0 and WinSPIRS 4.0 (and MacSPIRS 4.0 when it's available) will display those URLs as hotlinks, as long as you have adhered carefully to the directions below.

NOTE: the ability to link to websites from a URL embedded in a holdings message is available only with the ERL server v.4.0 in combination with v.4.0 clients, or with v.4 standalone systems. This feature is not supported in any other SilverPlatter clients.

To include URLs in your message, you must specify an HTML hotlink using the following syntax:

```
<A HREF="URL goes here">this text is highlighted and can be clicked on</A>
```

For example, to display the holdings message: "This journal can be viewed online at the Online Library." where Online Library is the hotlink prompt, you would input this text in the holdings file as follows:

```
This journal can be viewed online at the <A HREF="http://www.libraryname.org">Online Library</A>.
```

Be certain that you enter only a single space between the <A and HREF. The HTML markup is case sensitive - you must enter <A HREF in upper case. You must include the double quotes at the beginning of the URL, BUT DO NOT include double quotes at the end. Also, do not nest the references; use one link text at a time.

A link constructed as specified above may also be incorporated into default message. Remember, however, that the link capability may ONLY be used in conjunction with the v.4.0 ERL server or with v. 4.0 stand-alone systems.

This facility may be used in a variety of ways. For example, in libraries which maintain their serials holdings information at a website, creating a hotlink may be incorporated within a default message. Libraries which maintain local collections of full text journals on a website may use this facility to allow users to link to this text, by including an ISSN-specific URL for each journal title available at the site. It might also be used to link to a Union List of serials holdings. Libraries who participate in consortia but maintain separate OPAC's may embed multiple links within a single HCU message to allow users to link to the OPAC's of the individual libraries.

1.5 Supported Databases

Any SilverPlatter database that includes ISSNs can support the display of library holdings information, with the exceptions noted below. Note, however, that many ISSN-based databases also contain some subset of records that do not include an ISSN number. For example, older segments of databases which include extensive backfiles are less likely to include ISSN's than newer segments. There are also many databases index a combination of serials and other types of material, and only the ISSN-based records can display a holdings message.

There are also databases that include a rubric (i.e. extraneous textual data) preceding the actual ISSN, which makes it difficult for the client to interpret the ISSN number. Records in these databases will not successfully display holdings messages unless used with ERL server v. 4.0 or a v.4.0 standalone system.

In systems using ERL server v.4 or v.4 standalone systems, title matching will occur when there is no ISSN. However, there are only a relatively small number of SilverPlatter databases which can reliably support title matching (see section 1.7 for additional information).

The following databases will only display holdings messages if used with ERL server v. 4.0 or v. 4.0 standalone systems (these are built using SilverPlatter I3 technology):

- Analytical Abstracts (ANAB)
- Business and Management Practices (BMPR)
- Biosis Previews (BPRV)
- Business & Industry (BSNI)
- ClinPsyc
- Current Contents Life Sciences (CCLS)
- Current Contents (CCON)
- Current Contents Science Edition (CCSE)
- Compendex (COMP)
- Contemporary Women's Issues (CWMI)
- World Textiles from Elsevier (ELWT)
- International Bibliography of Social Sciences (IBSS)
- Iowa Drug Information Service (IDIS)
- Library and Information Science Abstracts (LISA)
- MEDLINE Advanced (MEDS)
- Pascal Biomed (PBMA)
- PsycLit
- RSN Russian Scientific News (RSNW)
- Ulrichs International Periodicals (UIGP)

1.5.1 Excluding Specific Databases from displaying Holdings messages

The version 4.0 ERL server and v.4.0 stand-alone systems support the ability for the library to explicitly exclude specified databases from displaying HCU-generated holdings messages. The default is to display available holdings messages in all databases.

In a v. 4 ERL-system, you specify databases to be excluded from displaying holdings messages within the coretags.cfg file. (The coretags.cfg file is located at: sproot/dbase/coretags.cfg). In a V.4.0 standalone system (i.e. WinSPIRS v.4 or MacSPIRS v.4 when available), the list of databases is specified within the .ini file of the client .

The tag which is used to identify the list of databases for holdings is "!42". In order to specify databases to be excluded, remove the semi-colon (;) preceding the tag, and then key in the family ID of each database(s) to be excluded, with commas separating each entry.

EXAMPLE: !42 ML, IDIS

NOTE: WebSPIRS v.4 users can also use the webspirs_user.cfg option "text.databases.p=" to configure a subset of databases for which HCU-generated messages should be INCLUDED. Customers using WebSPIRS v.4 as their only client can use the webspirs_user.cfg option in lieu of the coretags.cfg entry in the ERL server. However, Customers using a combination of clients are advised to use the coretags.cfg option as it applies to all clients. Any selection of databases excluded from displaying HCU-generated holdings messages in the coretags.cfg file in the ERL v.4 server are not available for inclusion using webspirs_user.cfg. However, the

webspirls_user.cfg may be used to further refine the set of databases which will display holdings messages within WebSPIRS v.4.

1.6 Supported Retrieval Software

Files generated by HCU can be used with any combination of a Release 4 SPIRS client in conjunction with ERL server v.4.0, or with any version 4.0 standalone system (i.e. WinSPIRS v.4.0 or MacSPIRS 4.0 when it becomes available). The table below lists specific features of the HCU-generated holdings files and indicates which versions of SilverPlatter clients and server provide support for these features:

HCU Feature Support	WebSP4 /ERL 4	WebSP4 /ERL2X	WebSP 3.1/ERL4	WebSP. 3.1 / ERL2X	WinSP4 or MacSP4 /ERL4	WinSP4 or MacSP4 /ERL2X	WinSP 2x or MacSP 2X /ERL4	WinSP 2x or MacSP 2X/ ERL2X
support for all ISSN dbs (1)	Y	N	Y	N	Y	N	Y	N
exclude specific db's.	Y	Y	Y	N	Y	N	Y	N
launch browser for embedded URL	Y	N	N	N	Y	N	N	N
HCU file filter for WebLink (2)	Y	Y	N	N	N	N	N	N
Default msg if NO matching ISSN	Y	N	Y	N	Y	N	Y	N
64000 msg's. of any length (3)	Y	N	Y	N	Y	N	Y	N
n for linefeed in message	Y	N	Y	N	Y	N	Y	N
rubric-handling in ISSN field	Y	N	Y	N	Y	N	Y	N

* The MacSPIRS v.4 client is due to be released in 1999

(1) "N" indicates that I3 databases are not supported. See list in Section 1.5

(2) The Web-linking features is available only to WebSPIRS 4.0 users, and only in libraries with Web-compatible OPAC's. When HCU is used in conjunction with Web-linking, WebSPIRS 4 can be configured so that the Web-link button is only displayed when the LHD file contains a match for the ISSN in the SP record. See section 2.4.

(3) In an ERL 4 environment, the message file can accommodate a maximum of 64000 entries, and there is no length limitation on the individual messages. However, with ERL v.2.09.5 or ERL 2.11 systems, the entire .LHM file cannot exceed a total length of 64K. Holdings messages can include locations, call numbers, links to websites, and other holdings information.

FEATURE SUPPORT IN SPIRS STAND-ALONE SYSTEMS:

WinSPIRS v.4 and MacSPIRS v.4 (when available) are equivalent to the corresponding v.4 client with the ERL server v.4.

WinSPIRS 2X and MacSPIRS 2X do not support any of the HCU features listed in this chart.

1.7 How Does HCU Find Matching Entries?

When HCU is enabled and holdings files are installed appropriately, supported SilverPlatter retrieval clients refer to the holdings files to see if there is an entry in the holdings file which corresponds to the journal cited in the SilverPlatter bibliographic record(s) being displayed. The primary matching key is the ISSN number.

In some SilverPlatter databases, the ISSN data is preceded by a "rubric", i.e. some descriptive non-numeric data (e.g. <ISSN: 1234-1234>), where "ISSN" is the rubric. In systems running ERL server v.4.0 or v.4.0 standalone systems, the software is able to distinguish the actual ISSN data from the rubric, in most cases. However, in pre-v.4.0 systems, ISSN matching will not be successful for databases which include a rubric in the ISSN field.

In some databases, multiple ISSN numbers may have been entered into the IS field. It's unlikely that matching will occur, as the software will be unable to distinguish individual ISSN's from within the field.

Under certain circumstances, when ISSN matching isn't successful, the system will attempt to find a match between the title in the SilverPlatter record and a title in the holdings file. Title matching will only take place with an ERL v.4 server or a v.4.0 standalone system. However, title matching is only an option in a small subset of SilverPlatter databases in which there is a separate field which contains only the journal title. In most databases, the journal title is included in a field which also contains additional information pertaining to the bibliographic citation, and therefore the title cannot be isolated for matching purposes. Title matching is also problematic in databases where journal names are not hyphenated or where journal names include periods (fullstops) or where journal names include accented characters. Single-word journal titles may also be problematic, depending upon whether the title in the SilverPlatter record is followed by a hyphen or not (matching will not occur if the single-word title in the SilverPlatter record is followed by a hyphen).

Within the HCU interface, you may specify what behavior should be followed when there are duplicate titles. You may indicate either that messages be concatenated when there are duplicate matching titles, or that only the message associated with the first matching entry should be used.

1.7.1 Addressing ISSN discrepancies

There are cases where the ISSN number for a particular journal as represented in the SilverPlatter record does not match the ISSN for that same journal as represented in your library's holdings file. This may occur due to data entry errors; out-of-date information; differing editions of a journal (e.g. a US and a British edition); ISSN changes, etc. There are also cases where a particular journal may have more than a single ISSN assigned to it, for example if it's published in different editions. Discrepancies such as these may become apparent when you notice that SilverPlatter records which cite a journal which you know to be in your collection are not displaying the appropriate holdings message.

Customers using HCU on the UNIX platform can use HCU's Fixup File facility to address some of these occurrences.

Customers using HCU on the Windows platform can address discrepancies by adding duplicate/dummy records to the ASCII file of serials holdings for a particular journal title, each one bearing a variant ISSN number. Customers who are using HCU for Windows and whose input file is in MARC format will need to import the ASCII file which is created as a result of the MARC/ASCII conversion step into a word processing or spreadsheet program; make the necessary additions; and then use the resultant ASCII file as the input file to ASCII/SP-Holdings step of HCU.

NOTE: It's possible that the ISSN which you need to change is in fact the correct ISSN for that journal (in the case where the ISSN in the SP database record is in error). It's also possible that

that ISSN actually corresponds to an actual ISSN in another SilverPlatter record. To determine if there will be conflicts with any other records in your SilverPlatter databases, you should do an ISSN search in all of your SilverPlatter databases prior to creating a Fixup file entry

You will also need to check whether the mismatched ISSN occurs throughout the SP database for that journal or only in a small number of records. If the mismatch occurs in only a small number of records in the database, then making the change in the Fixup File is not recommended.

For HCU/Unix users who wish to create a fixup file, the format for making entries in the fix-up file is:

```
ISSN<delimiter>oldissn<delimiter>addedissn
```

Where "old issn" is the issn number as it appears in your serials holdings record, and "addedissn" is the new issn which you want to have the client use for comparison to the ISSN in the SilverPlatter bibliographic record.

For example: ISSN 0959-8146 0267-0631

Important: "ISSN" must be all caps and the fixup file must be delimited in the same way the main file is (i.e., tab/tab, comma/comma, etc.). In the example above, a <tab> is used as delimiter.

1.8 Older SilverPlatter-Style Holdings Files (SPLHA)

If you have used the SilverPlatter Library Holdings Administrator (SPLHA) in the past and have .LHM and .LHD files, you can continue to use those files with ERL Release 4 clients and servers to display holdings for the limited set of SPLHA-supported databases (Medline Advanced; Medline Express; Medline Standard; Medline Professional; CINAHL; HealthStar; PsycLit; ClinPsyc; Wilson Readers' Guide; RNDEX.) for the time being. You cannot, however, use both HCU and SPLHA generated holdings files together: you must use one or the other. If you subscribe to SilverPlatter databases in addition to the SPLHA-supported ones, and you now wish to display holdings for these additional databases, you must use HCU-generated files for all of your holdings information. You may either create a single input file which includes all of your serials holdings, including the ones represented in the SPLHA-supported databases, and convert this file using HCU. Or you may use the Reverse.pl script to convert your existing SPLHA file to the ASCII format required as input to HCU; then import that file into a word-processing or spreadsheet program, and then add to it any additional serials holdings which are not included. Contact SilverPlatter Technical Support for information about the SPLHA/ASCII Conversion Utility, i.e Reverse.pl.

SilverPlatter strongly recommends that you make plans to migrate your holdings information from SPLHA to the new format as soon as possible. The SPLHA Utility v.1.2 will only be supported by SilverPlatter through the end of December 1999.

Important: Before You Upgrade from SPLHA to HCU

Files created using the SilverPlatter Library Holdings Administrator (SPLHA) and files created with the HCU share file names. If you are upgrading from SPLHA to the HCU, be sure to backup your original SPLHA.LHD and SPLHA.LHM files before using the HCU.

1.8.1 Converting SPLHA files to ASCII using Reverse.pl Script

If you cannot extract your entire serials holdings files from your OPAC or obtain them from some other source, you can use reverse.pl to convert your existing SPLHA files into an ASCII file, which can then be processed by HCU. If you subscribe to SilverPlatter databases in addition to the databases which are supported by the older SPLHA utility, you could then import that ASCII file into a word processing or spreadsheet program and add additional journals in your collection to this file. You would then have a complete ASCII file of your serials holdings to process with HCU.

Reverse.pl is a PERL script which is installed as part of the HCU installation. It requires that PERL 5.003 or 5.004 be installed on the ERL server. If you have run HCU on a different machine, and you don't have PERL installed on your server, you can install HCU on the ERL server in order to obtain PERL.

If you have included a Call Number field with your SPLHA files, reverse.pl will append the call number to the message text in the resultant ascii file.

The syntax for running reverse.pl from the HCU directory in Windows is as follows:

```
PERL5003\bin\perl -I PERL5003\lib reverse.pl LHD_file_name  
LHM_file_name -o outputfilename -l logfilename
```

(NOTE: -l logfilename is optional)

1.9 RUNNING THE HCU UTILITY

The HCU Utility may be run on any of the following platforms: Windows 95; Windows 98; or Windows NT; or on a SCO, Solaris or AIX server.

NOTE that the platform on which you run the HCU utility to generate the SP-formatted holdings files is totally independent from the platform on which you install the resultant file. That is, for example, you may run the HCU utility on a Windows platform, but then install the HCU-generated files on a Unix, Macintosh, or DOS platform.

1.9.1 Running HCU on UNIX (SCO, Solaris, AIX)

1.9.1.1 Installing HCU on UNIX (SCO, Solaris, AIX)

Requirements

The UNIX version of the HCU works on the following platforms:

- SCO OpenServer 5
- Solaris v2.5+
- AIX v4.2+

FTP Download Instructions

1. Log on to your Internet account.
2. At the Internet prompt, type:
open [ftp.silverplatter.com](ftp://ftp.silverplatter.com)

or use the following IP address:
192.80.71.12
3. Enter the username and password supplied by SilverPlatter.
4. Type: cd hcu
5. Type: bin
6. Get the hcuinstall.tar.Z file from the appropriate /hcu subdirectory.

Installation Instructions

NOTE: The HCU installation includes an installation of Perl 5.003 in the HCU directory. Perl must be present in that directory in order for HCU to function correctly.

1. Log on to your server as "root".

2. Uncompress the file by typing
uncompress hcuinstall.tar.Z

The hcuinstall.tar file should appear.

3. Create the hcuinstall directory by typing
tar -xvf hcuinstall.tar

In the resulting hcuinstall directory the following files should appear:

```
hcu.sh-orig
hcumarc.sh-orig
hdm.pl
holdings.sh-orig
lhimport.pl
lhindex.pl
marchold
perl.tar
dedupekey.pl
hfix.pl
reverse.pl (and its tables: citation.tbl; psyc.tbl; ser.tbl)
setup
```

4. Change to the hcuinstall directory by typing:
cd hcuinstall
5. Set up the HCU using the setup script by typing:

```
./setup
```

and accepting the default directory /sproot/hcu. You may specify another directory, e.g. /usr/local/bin, if you prefer.

1.9.1.2 Using HCU on UNIX to Convert Your Holdings File

Once you've completed the installation, use the holdings script to convert your MARC or ASCII format holdings file to the SilverPlatter format. Then you must copy the SilverPlatter format files to the server in an ERL environment or to the SilverPlatter workstation in a standalone environment. Each copy of the client that you want to give access to holdings messages must be set to display holdings messages.

Starting HCU

Start HCU in one of two ways from any directory other than the installation directory.

- If the HCU installation directory is in the path, start the holdings script by typing
holdings
- Otherwise, start the holdings script by referencing it by absolute path, for example:
/sproot/hcu/holdings

1.9.1.2.1 Converting a MARC Input File

To convert a MARC input file, use the MARC option (M) and then specify the file details. Press [Enter] to use the default (or selected setting) which appears in brackets.

The following default settings—which are not displayed—are used for the MARC and OCLC formats:

	Tag	Subfields	Divider
ISSN	022	a	
Title	245	anp	
Message	852	abhlt	Space
	866	a	Space
	866	z	Linefeed

If the MARC or OCLC file you are using uses different tags, use the Unlisted (U) format option and specify tags and subfields in the form:

tag/subfield,tag/subfield,tag/subfield

Separate each tag from its subfield(s) with a slash (/) and each tag from the next tag with a comma. If you do not specify subfields, all subfields will be used.

The default divider is a space. If you want to specify a linefeed, follow the subfield with an asterisk (*), for example:

852/ab*ht,866/az*

The example below shows the script in review mode with a few changes being entered:

```

MARC Type
  0 OCLC Union List
  1 MARC
  U Unlisted
Enter choice [1]:
Holdings MARC fields [852]:
Bytes between records [0]: [enter number of intervening characters between records if any]
Holdings message prefix [William and Mary library holds]:
Default message [Default message for Will and Mary]:
Input file [marchldg]:
Output file [willmarc]: splha
Log file [splha.log]:
Concatenate messages with duplicate keys? Y (default is N)
Action
  Convert
  Save script
  Review input
  Exit
Enter choice [S]:c
No separator specified; defaulting to tab
MARC type set to MARC by command line
Command line overrides holdings fields defaults
Using default holdings fields for type MARC
Using default biblio fields for type MARC

```

The MARC file will be converted to the SilverPlatter holdings format files: .LHD, .LHI, and .LHM. Output exceptions are displayed on the screen and saved in the log file, if you specified one.

Note that the default messages, as well as the bibliographic and message tags may be entered into the holdout.cfg file rather than in the script as described above. Refer to Section 1.4.1.1.2 for information on using the Holdout.cfg file. Format definitions entered into the holdout.cfg file may be re-used whenever HCU is run.

1.9 .1.2.2 Converting an ASCII Input File

To convert an ASCII input file, use the ASCII option (A) and then specify the file details. Press **[Enter]** to use the default. An example appears below:

```
Column separator character [TAB]:
Default message [None]:
Input file [None]: ascii.txt
Output file [splha]:
Log file [splha.log]:
Concatenate messages with duplicate keys? Y (default is N)
Action
  Convert
  Save script
  Review input
  Exit
Enter choice [S]:c
No separator specified; defaulting to tab
```

The ASCII file will be converted to the SilverPlatter holdings format files: .LHD, .LHI, and .LHM. Output exceptions are displayed on the screen and saved in the log file, if you specified one.

If you use any of the following characters as the delimiter between each field in your ASCII file records, you must specify the delimiter preceded by a backslash character, e.g. "*" for an asterisk delimiter.

- \
- |
- (
-)
- [
- {
- ^
- \$
- *
- +
- ?
- .

1.9.1.3 Installing the HCU-Generated Files on Your Server

The HCU outputs three files for use by the SilverPlatter retrieval clients:

SPLHA.LHD—the lookup key file which contains ISSNs and journal titles to match.

SPLHA.LHI—a list of offsets and lengths for each message in the message file. The .LHI file optimizes message lookup for users by retrieving holdings messages individually when called by the client settings.

NOTE: only version -4.0 clients and v. 4.0 servers will use the .LHI file.

SPLHA.LHM—the message file.

Multiple sets of holdings files may be installed on the ERL server, each one corresponding to usage by a specific ERL user ID. For example, libraries participating in a consortium, where each library assigns a unique ERL user ID to their own user community, may each load their own holdings files separately, and their own users would see holdings messages specific to their own institution

Copy or ftp splha.lhd, splha.lhm, and splha.lhi to the appropriate subdirectories, which are:

- the directory of standalone clients (not MacSPIRS)
- MacSPIRS Overrides
- erl/sproot/cfiles for ERL network-wide use
- each user subdirectory of erl/sproot/cfiles for use by specific ERL users (create user subdirectories using the internal ID of the user account, e.g., 00000b25)

IMPORTANT: If you are FTPing your holdings files to an ERL v.4 server, you should transfer all of the files in binary ("bin"). However, if you're transferring your files to an ERL v.2X server, you should use binary for the .LHD and .LHI files and ASCII ("asc") for the .LHM file transfer. If you find that your holdings messages are not displaying, you may need to run the HFIX utility (see Section 1.9.3)

If you are using a pre-4.0 server or a pre-4.0 client in standalone mode, enable holdings in the client config file (e.g., WinSPIRS Reconfig).

1.9.2 Installing and Running HCU on Windows 95/NT

The Windows version of HCU may be installed for use on the following platforms:

- Windows 95
- Windows 98
- Windows NT 3.51 or greater

1.9.2.1 FTP Download Instructions

1. Log on to your Internet account.
2. At the Internet prompt, type:
open [ftp.silverplatter.com](ftp:silverplatter.com)

or use the following IP address:
192.80.71.12

3. Enter the username and password supplied by SilverPlatter.
4. Type: cd hcu
5. Type: bin
6. Get the hcu.exe file from the appropriate /hcu subdirectory.

1.9.2.2 Installation Instructions

The HCU installation includes an installation of Perl 5.003 in the HCU directory. Perl must be present in that directory in order for HCU to function correctly.

To install HCU:

1. Run hcu.exe from a temporary directory to start the installation program.
2. Follow the instructions on the screen to complete the installation.

You first confirm the directory to which the software will be installed. We recommend using the installation program's default:

C:\Program Files\SilverPlatter Information\HCU

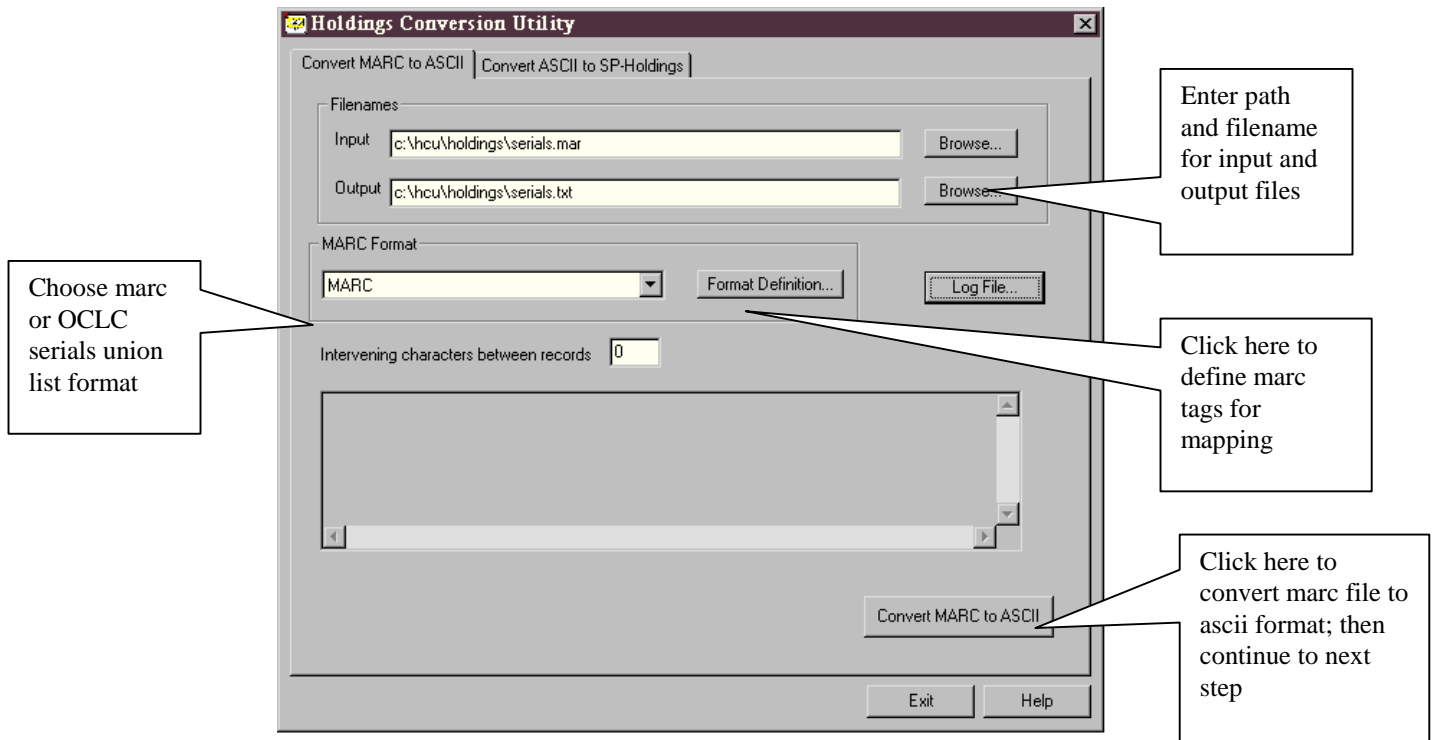
1.9.2.3 Running HCU on Windows 95 or Windows NT to Convert Your Holdings Files

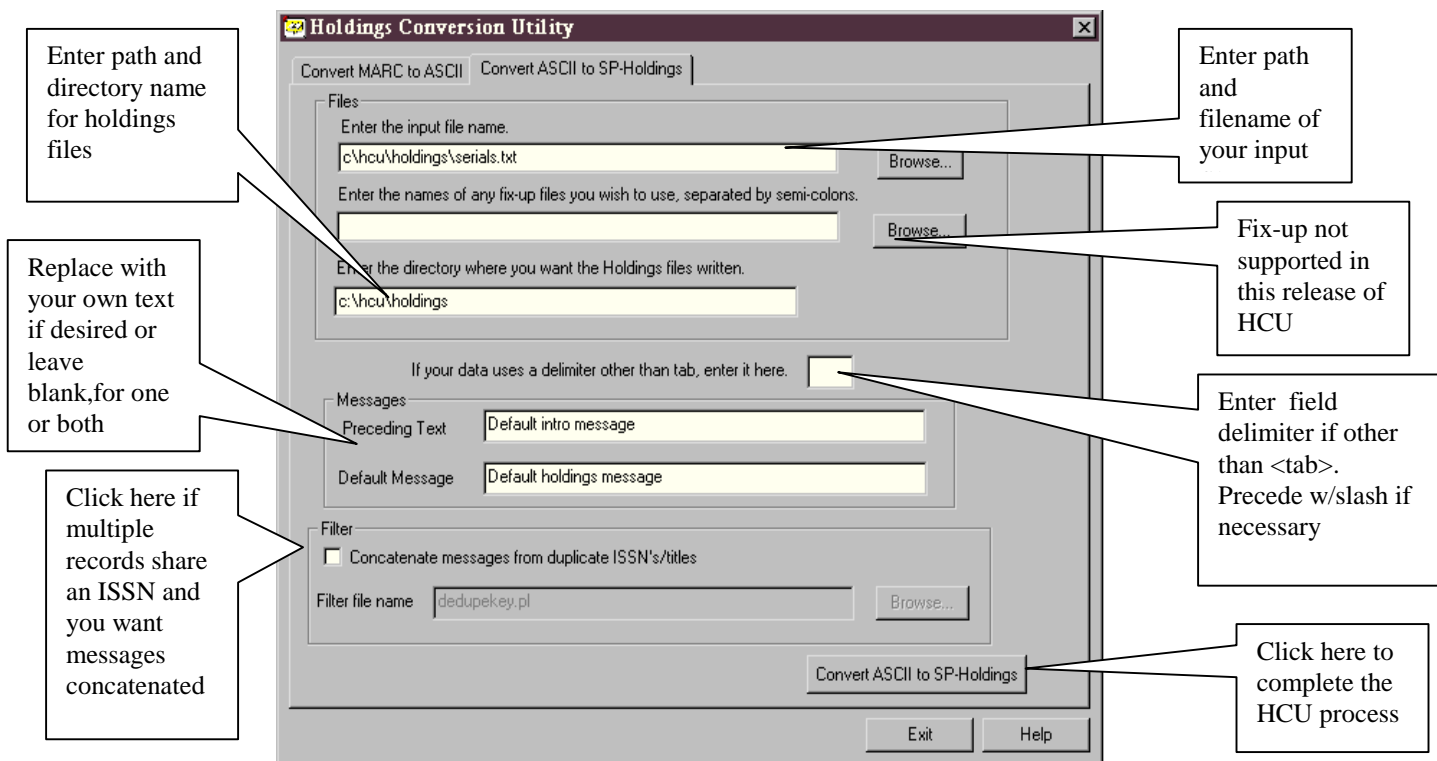
1. Start HCU by doing one of the following:
 - From the Taskbar Start Menu, select Programs - Holdings Conversion Utility and select the Holdings Conversion Utility icon.or
 - Using Explorer, go to the directory where HCU is installed and double-click on the HCU.EXE.
2. The HCU starts at the Convert MARC to ASCII tab. If you have an ASCII file to convert, click on the Convert ASCII to SP-Holdings tab.
3. Enter the file details in the appropriate boxes and click on the conversion button. Refer to the online help for detailed explanations of the conversion programs.

NOTE: Convert MARC to ASCII is a C program. Convert ASCII to SP-Holdings is a Perl script.

NOTE: if you create and save new MARC format definitions, the only way to delete them is to discard the file "holdings.dat" from the HCU directory. The formats will revert to their defaults.

Below are screen shots illustrating (1) the MARC to ASCII conversion, for customers whose serials input file is in MARC format; and (2) the ASCII to SP-Holdings format. Customers beginning with a MARC input file must complete (1) first; then continue with (2). Customers beginning with an ASCII file must complete (2).





1.9.2.4 Copying the HCU-Generated Files to Your Server

The HCU outputs three files for use by the SilverPlatter retrieval clients:

SPLHA.LHD—the lookup key file which contains ISSNs and journal titles to match.

SPLHA.LHI—a list of offsets and lengths for each message in the message file. The .LHI file optimizes message lookup for users by retrieving holdings messages individually when called by the client settings.

NOTE: only version -4.0 clients and v. 4.0 servers will use the .LHI file.

SPLHA.LHM—the message file.

Multiple sets of holdings files may be installed on the ERL server, each one corresponding to usage by a specific ERL user ID. For example, libraries participating in a consortium, where each library assigns a unique ERL user ID to their own user community, may each load their own holdings files separately, and their own users would see holdings messages specific to their own institution

Copy or ftp splha.lhd, splha.lhm, and splha.lhi to the appropriate subdirectories, which are:

- the \dbase directory of standalone clients (not MacSPIRS)
- MacSPIRS Overrides
- erl/sproot/cfiles for ERL network-wide use
- each user subdirectory of erl/sproot/cfiles for use by specific ERL users (create user subdirectories using the internal ID of the user account, e.g., 00000b25)

IMPORTANT: If you are FTPing your holdings files to an ERL v.4 server, you should transfer all of the files in binary ("bin"). However, if you're transferring your files to an ERL v.2X server, you

should use binary for the .LHD and .LHI files and ASCII ("asc") for the .LHM file transfer. If you find that your holdings messages are not displaying, you may need to run the HFIX utility (see Section 1.9.3)

4. If you are using a pre-4.0 server or a pre-4.0 client in standalone mode, enable holdings in the client config file (e.g., WinSPIRS Reconfig).

1.9.3 Running the HFIX utility

If, after transferring your HCU-generated files to your ERL server, you find that your messages are not displaying, you may need to run the HFIX utility to rectify any problems encountered in the transfer. HFIX is a PERL script which is included as part of the HCU installation. It requires that PERL 5.003 or 5.004 be installed on the ERL server. If you have run HCU on a different machine, and you don't have PERL installed on your server, you can install HCU on the ERL server in order to obtain PERL.

The syntax for running the hfix utility from a Unix or NT server using a version of PERL independent from HCU is: perl hfix.pl

The syntax for running hfix from NT, if you've got HCU installed on the server, is :

```
PERL5003\bin\perl -I PERL5003\lib hfix.pl
```

From the HCU directory.

1.9.4 Deinstalling HCU

IMPORTANT: If you wish to remove the HCU utility from your server, you must run the UNINSTALL HCU script. If you attempt to do this by simply deleting the files, you may be unable to install HCU (or WebAdmin) again due to corruption of the registry files.

1.10 HCU Error Messages

1.10.1 MARC conversion error codes

The following conditions result in a record being rejected by HCU

ERR_ORPHANS	1	- Orphaned holdings records found (they are logged & skipped)
ERR-BAD CONTROL	6	- control numbers don't match
ERR_NOSPACE	7	- ran out of buffer space; record skipped
ERR_BIBNOFIELDS	8	- bibliographic record has no ISSN, & no title; record skipped
ERR_NOMEM	10	- out of memory. This is fatal.
ERR_BADISSN	11	- failed validation
ERR_NODATA	13	- couldn't read indicated length of record (presumably EOF); record skipped

IMPORTANT: Any trailing characters following the last record in a MARC conversion will be reported by HCU as a fatal error. However, everything preceding those characters will have been

processed appropriately. Evidence of these characters will be found in the final processing statistics. E.G. if you see a message such as "2 records output" rather than the actual number of records you expected in your output file.

1.10.2 Perl script (i.e. ASCII-SP Holdings step) error messages

- 1 "New ISSN in ISSN/ISSN fixup already exists" - ignore fixup entry
- 2 "original ISSN in fixup does not exist" - ignore fixup entry
- 3 "New ISSN in title/ISSN fixup already exists" - ignore fixup entry
- 4 "Title in title/ISSN fixup not found" - ignore fixup entry
- 5 "Duplicate ISSN exists" - omit record
- 6 "Title points to 2 different messages" - omit record (duplicate title, but not associated with any ISSN)
- 7 "Title points to 2 different messages one of which is in this line" - omit record (duplicate title, but different ISSN and different message)
- 8 "No message found; no default message loaded" - omit record
- 10 "Title field contained non-valid characters; substitutions made" - attempt to substitute characters without diacriticals (not very thoroughly)
- 11 "Title too long; truncated to maximum of 82 characters" - as it says

The following messages are warnings; the record is processed by HCU :

ERR_NOISSN 22

ERR_NOTITLE 29

"Floating point exception" - fatal internal Perl error.

"syntax error" - generic error message - usually means it couldn't find 2 separators + line end. Attempts to recover & move on to next line.

1.11 How to Display Holdings Messages

You can set the server to display holdings messages for any retrieval client using that server.

For standalone systems, you must use configuration settings to enable display of holdings messages. With WinSPIRS 4.0, it is also possible to disable holdings for a particular database, for example if you find that the ISSNs in that database are not resulting in useful matching.

Refer to the documentation provided with the retrieval software for instructions on displaying holdings messages within database records.

The holdings message displays in the.LHM field in the SilverPlatter record. The location of holdings message field varies depending on the retrieval client and database you are using. In general, WebSPIRS holdings messages appear at the end of records, while other SPIRS clients display holdings messages after the Source or Journal Name field.

2. WEB-LINK to HOLDINGS

2.1 PRODUCT OVERVIEW

The WebLink to Holdings allows libraries using the WebSPIRS v.4.0 gateway to provide a link from a SilverPlatter record to the corresponding record in the library's web-compatible OPAC. The OPAC must be accessible via a static URL. The Web-linking feature supports linking from any SilverPlatter record containing either an ISSN or an ISBN number. The OPAC must have an ISSN and/or ISBN index. Libraries can activate the web-link for holdings on a database-specific basis.

When WebSPIRS 4X is used to search a database for which Web-Linking has been activated, a "Holdings" button displays within SilverPlatter records that contain either an ISSN or an ISBN number. When the searcher clicks on the button, WebSPIRS links to the library's web-compatible OPAC and performs an ISSN or ISBN search of the OPAC, using a URL it has constructed based on information entered into the `Webspirs_user.cfg` file concatenated with the ISSN or ISBN in the SP record. The user is actually "in" their OPAC at this point, and can peruse whatever records are pertinent. When they're done, they can close the OPAC window to return to their WebSPIRS search.

Customers accessing SilverPlatter databases via our Norwood-based Internet Subscription can take advantage of the WebLink to Holdings solution. They should contact Technical Support to arrange for the creation of the appropriate configuration settings.

REQUIREMENTS

WebSPIRS 4.0 is the only SilverPlatter search client which supports web-linking

The library must have a Web-compatible OPAC which is accessible via a static URL. An ISSN and/or ISBN index of the OPAC must be available .

Web-linking is available from any SilverPlatter record which contains either an ISSN or an ISBN number.

In order to implement the Web Linking feature, the library administrator must complete a set of configuration options defining the URL of the catalog to be linked to and the query protocol required for executing an ISSN/ISBN search. Internet Service subscribers can contact Technical Support to arrange for the creation of the required set of configuration options.

2.2 How Does WebLinking Work?

The WebLink to Holdings feature supported in WebSPIRS 4X constructs a search string for searching the library's OPAC based on the following information: URL of the library's OPAC; search query protocol for searching the OPAC's ISSN or ISBN index; and the ISSN or ISBN number itself.

WebSPIRS uses the "link.fieldlist.p=" entry in `webspirs_user.cfg` file to identify the fields in which to look for the ISSN or ISBN number. The default set of fields is: : ISSN; IS; ISBN; IB; and SN, in that order. Note that WebSPIRS merely looks for the presence of one of these fields; it DOES NOT evaluate the data contained in the field to determine if it is in fact a valid ISSN or ISBN. Consequently, the administrator may need to change the precedence; and/or add or delete fields from this list. Some examples of databases which require this are listed in Section 2.3.1.

Currently, WebSPIRS supports URL's in which the ISSN or ISBN occurs at the end of the URL; however, a future enhancement will support URL's with the ISSN or ISBN embedded in the middle.

For example, if you are linking to an OPAC from "ANYCOLLEGE":

1. Find the vendor.p= setting in the [SP.HOLDINGS] section of the webspirs_user.cfg file.
2. Set vendor.p=ANYCOLLEGE.
3. Change the the [VENDOR_1] section heading to [ANYCOLLEGE].
4. Specify the base URL for the OPAC. For example:

```
search.url.p=http://anycollege.library.edu/search%3Dbin/
```

NOTE: If the URL includes the symbols "&" or "=" (as above), they must be included as their hexadecimal values: %26 and %3D, respectively.

5. Set the command string that tells the system to perform a search. For example:

```
command.p=XYZ_Lib+search+open
```

6. Set the search format for ISSN and ISBN searches. For example:

```
issn.search.p=+issn+
```

```
isbn.search.p=+ke+
```

7. Save and close the file.

When a user clicks the button in a retrieved record, WebSPIRS builds a search string by combining the OPAC's URL (step 4), the command string (step 5), and the search format (step 6), then searches the OPAC to locate and display matching records.

2.3 Databases Supported

WebLinking is available for any SilverPlatter database records which contain either an ISSN number or an ISBN number. More specifically, it checks for the presence of one of the following fields: ISSN; IS; ISBN; IB; and SN, in that order. The set of fields which are checked, and the

order in which the software checks them is configurable by the administrator based on the setting of values in the `Webspirs_user.cfg` option `sp.holdings.link.fieldlist.p`. If a SilverPlatter record contains none of those fields; or if the data in the field does not conform to the expected ISSN or ISBN format, the WebLink button will not appear in the record.

If the WebLink button is not appearing as expected in one or all of the records in any of your SilverPlatter databases, you should check (1) to see if there is an ISSN or ISBN number in the record(s) in question; (2) if there is an ISSN or ISBN number, note the short field label of the field in which the number appears; and (3) compare that field to the list of fields in the `"link.fieldlist.p="` entry in the `SP.Holdings` section of `webspirs_user.cfg`.

Conflicts may occur depending upon the combination of SilverPlatter databases which you subscribe to and the fields in which the ISSN or ISBN number appears in these databases. The following list illustrates some examples of databases in which the ISSN or ISBN numbers appear in a way which might lead to a conflict, and the possible actions which you might take. NOTE: this is not an exhaustive list, but is intended to be representative.

A MATTER OF FACT (AMOF): ISSN is in IS field and ISBN is in IB field. However, AMOF also has an SN field, so for any records which don't contain an ISSN or an ISBN number, WebSPIRS will construct a URL using the data in the SN field. IF you have no databases in which the actual ISSN is stored in the SN field, you should remove SN from `link.fieldlist.p=`

ABI/INFORM editions (UMAF, UMAI): ISSN is in the IS field. However, it also has an SN field. For any records which don't contain an ISSN or ISBN number, WebSPIRS will construct a URL using the data in the SN field. IF you have no databases in which the actual ISSN is stored in the SN field, you should remove SN from `"link.fieldlist.p="`. If you also subscribe to a database in which the ISSN or ISBN are contained in the SN field, you may wish to enable only one or the other of the db's for WebLinking, using the `"link.databases.p="` entry in `webspirs.user.cfg`.

BIOETHICSLINE (BIET) : ISBN is in BN field. BN should be added to `link.fieldlist.p=`

ISSN is in SN field so subscribers to BIET and MLA will have a potential conflict

CINAHL (NURS): ISBN is in BN field. BN should be added to `link.fieldlist.p=`

CONCISE ENGINEERING AND TECHNOLOGY INDEX (CONC): ISSN is in the SN field so subscribers to CONC and MLA will have a potential conflict

DISSERTATION ABSTRACTS (UMDA): ISSN is in the IS field. However, it also has an SN field. For any records which don't contain an ISSN or ISBN number, WebSPIRS will construct a URL using the data in the SN field. IF you have no databases in which the actual ISSN is stored in the SN field, you should remove SN from `"link.fieldlist.p="`. If you also subscribe to a database in which the ISSN or ISBN are contained in the SN field, you may wish to enable only one or the other of the db's for WebLinking, using the `"link.databases.p="` entry in `webspirs.user.cfg`.

ERIC: PRIOR to the regeneration of ERIC in its new format (scheduled for March 1999), ERIC has ISSN number in the SN field. Customers who subscribe to both MLA and ERIC may wish to enable only one or the other of them until the new ERIC is available

FINDEX (FIND): The ISBN number is in the IB-ISBN field.

FOOD and HUMAN NUTRITION (FNUT): contains an IS field. Where there is no ISSN or ISBN, this field may contain an IPC number, which would probably lead to spurious results in your OPAC

FOOD SCIENCE and TECHNOLOGY ABSTRACTS (FSTA): ISSN or ISBN numbers are in the NU field; if you subscribe to FSTA, add NU to the list of fields in `"link.fieldlist.p="`

GALE ENCYCLOPEDIA OF ASSOCIATIONS (GASS): contains an SN field which contains "section number" data. you should enter the DBID's of all of your other db's into "text.databases.p=" in order to exclude GASS from WebLinking

CD ROM'S IN PRINT (GCDR): ISSN is in IS field and ISBN is in IB field. However, GCDR also has an SN field, so for any records which don't contain an ISSN or an ISBN number, WebSPIRS will construct a URL using the data in the SN field. IF you have no databases in which the actual ISSN or ISBN is stored in the SN field, you should remove SN from "link.fieldlist.p=". If you also subscribe to a db which has ISSN or ISBN contained in the SN field. In this case, you may wish to enable only one or the other of the db's for WebLinking, using the "link.databases.p=" entry in webspirs.user.cfg.

GALE DIRECTORY OF DATABASES (GDDR): contains an SN field which contains "section number" data. you should enter the DBID's of all of your other db's into "text.databases.p=" in order to exclude GDDR from WebLinking

GPOC: has both an IS and an SN field. For any records which don't contain an ISSN or ISBN number, WebSPIRS will construct a URL using the data in the SN field. IF you have no databases in which the actual ISSN is stored in the SN field, you should remove SN from "link.fieldlist.p=". If you also subscribe to a database in which the ISSN or ISBN are contained in the SN field, you may wish to enable only one or the other of the db's for WebLinking, using the "link.databases.p=" entry in webspirs.user.cfg.

HUMAN NUTRITION (HNUT): ISSN number is in the SN field; potential problems if you subscribe to both MLA and HNUT. ISBN number is in the BN field. BN should be added to "link.fieldlist.p="

LINGUISTICS and LANGUAGE BEHAVIOR ABSTRACTS (LLBA): ISBN numbers are contained in SN field, so subscribers to LLBA and MLA will have a potential conflict

MODERN LANGUAGES ASSOCIATION BIBLIOGRAPHY (MLAB): has both an IS and an SN field. Any records which don't contain an ISSN, WebSPIRS will construct a URL using the data in the SN field. IF you have no databases in which the actual ISSN is stored in the SN field, you should remove SN from "link.fieldlist.p=". If you also subscribe to a db which has ISSN or ISBN contained in the SN field. In this case, you may wish to enable only one or the other of the db's for WebLinking, using the "link.databases.p=" entry in webspirs.user.cfg.

PEST-BANK (PEST): has IS field NOT ISSN/ISBN. If you subscribe to PEST, you may need to enter the DBID's of all of your other db's into "text.databases.p=" in order to exclude PEST from WebLinking

SOCIOLOGICAL ABSTRACTS (SOCI): ISBN numbers are contained in SN field, so subscribers to SOCI and MLA will have a potential conflict

2.3.1 Enabling Specific Databases for WebLinking

You can enable the WebLink to Holdings feature for specific databases using the "link.databases.p=" entry in webspirs_users.cfg. Use this if you want the WebLink to be enabled for only a subset of all of your SilverPlatter databases. For example, if you subscribe to a combination of databases whose ISSN/ISBN fields conflict with one another.

2.4 WebLink to Holdings and HCU

In libraries which have set up both the WebLink to Holdings option as well as the HCU-generated static holdings file, it is possible to configure WebSPIRS 4.0 so that the Web-Link to Holdings button only displays when the HCU-generated library holdings file contains a match for the displayed ISSN. In other words, the static holdings file can be used to act as a filter for the WebLink button, thus minimizing the times when a user would click on the WebLink button and find 0 hits in the online catalog . Use the "requires.text.p=" option in webspirs_user.cfg to set up this feature.

Refer to the WebSPIRS 4.0 Online Help and WebSPIRS 4.0 Implementor's Guide for more information about configuring the static holdings option to act as a filter for the WebLinking option.

NOTE: that the filtering capability is only available for ISSN-based databases. WebLinking is available for ISBN-based databases, but there are no entries in the HCU-generated static files which will include ISBN's. Consequently, if you have enabled WebLink to Holdings for any ISBN-based databases, every record with an ISBN number in those databases will display the Weblink button.