

introduction

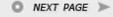


Innovative's CASE, or **Content Access Service**, delivers the comprehensive and accurate e-journal data needed for first-rate user access and library efficiency.

This suite of offerings include:

- The CASE Coverage Data Service to complement link resolvers and ERM systems
- The CASE HTML A to Z List for an accurate online browse screen
- The CASE MARC Record Service for in-depth, pre-cataloged metadata (coming soon)

Each service is available with the CASE Profile Manager to create a summary of your sources with a sophisticated, yet simple, Web-based interface. CASE is available to Innovative customers and the library community at large.





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navigation & requirements



At the bottom of each page are links to the next and previous pages. We recommend you follow through the tutorial steps using the

≪ PREVIOUS and NEXT PAGE ➤

At any time you can select from the drop down menus on the navigation bar across the top of each page. Within pages there are links to other pages in the tutorial. Use your browser's Back button to return to your previous place in the tutorial. Links to pages outside the tutorial open in a separate browser window. To return to the tutorial, close the external link window, or click on the tutorial window to make it active.

RECOMMENDED SOFTWARE AND HARDWARE SETTINGS

Web browser:

- · Mozilla Firefox 0.8 and higher
- · Microsoft Internet Explorer 6 and higher
- · Mozilla 1.0 and higher
- · Netscape Navigator 6.1 and higher
- · Opera 7.0 and higher

Monitor setting: 1024 x 768 resolution or higher, with browser window maximized

Colors: at least 256 or higher

Specifically, Innovative recommends that you use a browser that supports HTML and XHTML, Cascading Style Sheets (CSS), ECMAScript (the standard behind scripting languages such as JavaScript), and the W3C Document Object Model (DOM). Any of the modern browsers listed above provide at least base level support for these standards and will improve your browsing experience in the Web OPAC and beyond.

PRINTING

You can print individual tutorial pages and screens from within a Web browser using the 'Print this page' icon



Customers may also download and print this tutorial as a PDF document. To view and print it you need Adobe Acrobat Reader software



which you can download from Mo

DOWNLOADING

Customers who would like to mount this tutorial on a local server for the use of their staff, without having to allow them full access to CSDirect, may download the tutorial as a ZIP (size of 2.2Mb) file.

After the file has been downloaded and unzipped into the Local directory of choice you will see a list of individual html pages. Double click to open a page called index.html and the tutorial will be accessible. Once it has been downloaded locally, you may choose to open it in a web editor and insert local policies, practices or notes.

Please note that internal links to the Innovative Guide & Reference will result in a "page cannot be found" error message since the tutorial uses a relative addressing system. However, the link reference contains the Reference Guide's page number, which can be searched within the customer Millennium server's own version of the Reference Guide.

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introduction

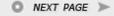


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profiling

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In the CASE Profile Manager, you can view a list of packages/electronic resources that are available, and set up your library profile. Your library chooses packages you subscribe to, and sets up rules that denote your coverage and restrictions. From this profile, an XML coverage load file is created, which is used to load coverage information into Millennium.

- This service is completely web-based, and is done by logging on to http://case.iii.com/
- You will be sent an email with your institution's Account Name and Password when your CASE service is activated. You can change the Password at any time, but not the Account Name

A searchable A-Z list is also generated each time you update your profile:

- . The A-Z list is hosted on the CASE server
- You can link to your A-Z list from your WebPAC or library web page, and integrate local search icons into the A-Z list, to direct users back to your WebPAC
- You can customize the list with your institution's branding. Updates can be made by logging on to CASE, making profile or other changes, and requesting an update to your coverage file and your A-Z list.







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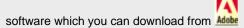
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information tab



Log into the CASE server (case.iii.com) with your institution's username and password. The Info tab will display Status Information as follows:

Profile Adm	in A-Z Settings			
Status Information				
Release Date:		2006-06-25 07:04:06		
Profile Date:		2006-07-06 02:57:36		
Request I	Date:	2006-07-05 05:35:43		
Build Dat	e:	2006-07-05 05:40:44		
Build Title Count:		135		
	Release I Profile Da Request I Build Dat	Release Date: Profile Date: Request Date: Build Date:		

The Info tab is the first page in the CASE Profile Manager. It will display the following Status Information:

Release Date

Date and time that the CASE server's software was released.

Profile Date

Date and time that your library last updated its profile.

Request Date

Date and time that your library last requested an update file from the CASE server.

Build Date

Date and time the CASE server created an update file for your library.

Build Title Count

Number of titles that your library is listing as currently subscribed to in the last update file.

This screen will give you valuable information about your CASE account, such as the most recent update that has been requested, when that update was processed, and the number of titles that were added to your subscription based on your request. Note that while the CASE server is located in Emeryville, CA, the times that are listed in the INFO tab correspond to your library's local time.





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profiling

In the CASE Profile Manager, you can view a list of packages/electronic resources that are available, and set up your library profile. Your library chooses packages you subscribe to, and sets up rules that denote your coverage and restrictions. From this profile, an XML coverage load file is created, which is used to load coverage information into Millennium.

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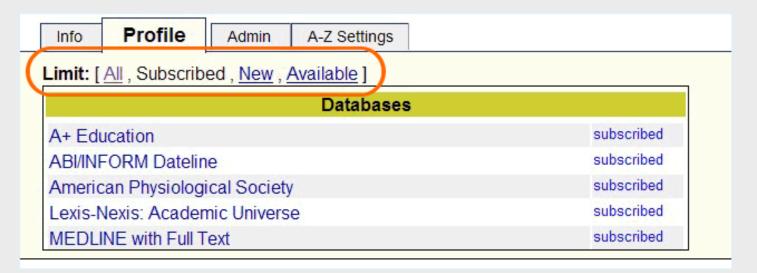
profile tab



The Profile tab allows you to define your library's journal collections from the list of subscriptions provided. When you select a package from the list, you must create one or more rules that specify the titles and coverage for that particular package. A rule can be very simple or more complex. Here are some examples of rules you can create:

- "We subscribe to the entire package". The CASE Interface will add all of the titles in the selected package to the coverage file and A-Z list, with the start and end dates for all journals in the package.
- "We subscribe to the entire package, but only full-text journals". The CASE Interface will add all of the titles in the package for which full text is available.
- "We subscribe to a selected list of journals that are part of this package". You can see a list of all the journals that are part of the package, and select individual journals to which you subscribe.

When you have made changes to your profile, click the Request button to request an updated coverage load file from Innovative. There are four limits within the Profile tab:



All Contains a list of all possible subscriptions within CASE

Subscribed The packages you have subscribed to and created rules for in CASE

New packages that are available

Available List of packages that you have not chosen as subscribed

To add a new rule to your CASE profile, you will need to take the following steps:

CLICK TO VIEW MOVIE ANIMATION

You can create a general rule:

Or a rule that is more complex, containing information such as date restrictions:

Please ensure that your browser allows popups from this site.

- 1. From the list of packages, select a database to which you subscribe.
- 2. Click on the "Add New Rule" button.
 - Note: If you subscribe to the entire package with no restrictions, you can leave Content Type and Titles set to "All", with no Date Range restrictions. Just click on the Save button to complete the new rule.
 - o If you have more a more complex situation, you can work with the Content Type, Date Range, and Titles sections of the rule.
- 3. First, select the type of coverage you have. It will either be "All" or any combination of coverages you select from the list.
- 4. Next, select which of the titles in the package you have. Using the "All", "Selected", and "All Except" radio buttons will make this task easier. If you choose either "Selected" or "All Except", a button marked "Select Titles" will appear. Clicking this button will open a new page that contains a title list.
 - You can select titles one at a time, holding down the CTRL key on your keyboard, or you can select a list of titles by clicking on the first title, hold down the SHIFT key, and click on the last title in the list.
 - After selecting the titles, click \"OK\" to add them to the title list.
 - NOTE You may go back to the title list as many times as you like to add or delete titles before finishing the rule creation.
- 5. If you have any date restrictions for the journal package, you will need to enter those coverage dates now. If you have unrestricted access to the package, you may leave the date fields blank.
- 6. Once you have completed the adjustments to your rule, click the "Save" button at the bottom of the page. This will take you back to the summary page for that journal package, and allow you to view the rule you've created.
- 7. If you need to create more rules for that package, follow these steps again.
- 8. If you are finished with the rule creation for this journal package, click on the "Profile" tab to return to the list of journals. The limit you had selected will be the limit you are returned to. To make these changes permanent and adjust your coverage load, you will need to click the "Request" button in the upper right side of the screen.

When you click the Request button, a "New request issued" screen will display. You will receive an email message when the Content Access Service has completed the new file build and made it available for your Millennium server.

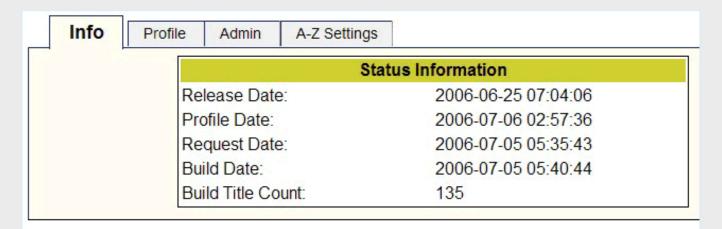


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information tab

Log into the CASE server (case.iii.com) with your institution's username and password. The Info tab will display Status Information as follows:



Release Date

Date and time that the CASE server's software was released.

Profile Date

Date and time that your library last updated its profile.

Request Date

Date and time that your library last requested an update file from the CASE server.

Build Date

Date and time the CASE server created an update file for your library.

Build Title Count

Number of titles that your library is listing as currently subscribed to in the last update file.

This screen will give you valuable information about your CASE account, such as the most recent update that has been requested, when that update was processed, and the number of titles that were added to your subscription based on your request.

Note that while the CASE server is located in Emeryville, CA, the times that are listed in the INFO tab correspond to your library's local time.

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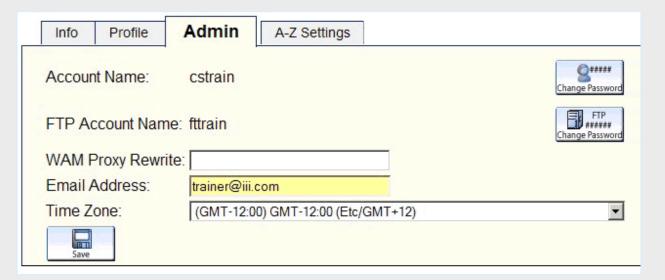
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administrator tab

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The Admin tab contains information used to manage your CASE account. An administrator can login to the CASE server and select the ADMIN tab to do the following:



Change Account Password: Click on the Change Password button to the right of the Account Name. In Update WEB Password, enter the old password, the new password, confirm the new password, and press Save. Your password for logging in to the CASE server has been changed. Your Account Name is assigned during set up and cannot be changed.

Change the FTP Account Password: If your library is using CASE without the Millennium suite of products, or if you are a high security site, you may use an FTP Account. This allows you to login to the CASE server, and get your newest Coverage Load file via FTP (rather than having Innovative put the file on your server). To change your FTP password, click on the FTP Change Password button to the right of the FTP Account Name. In Update FTP Password, enter the old password, the new password, confirm the new password, and press Save. Your password for FTP has been changed. Your FTP Account Name is assigned during set up and cannot be changed.

WAM Proxy Rewrites: This is only applicable if your library has acquired Web Access Management. If so, you can enter the WAM rewrite address of your proxy server here. Once this is done, the database addresses in each update file are rewritten to the proxy server. Simply enter the WAM rewrite address in the WAM Proxy Rewrite text box and press Save.

Email Address: You can designate one or more email addresses where you will receive email notifications from the CASE server. These emails include such things as notification when a requested update file has been sent and information about new resources that have been added to the CASE database. Enter an email address in the Email Address text box (separate multiple addresses with commas) and press Save.

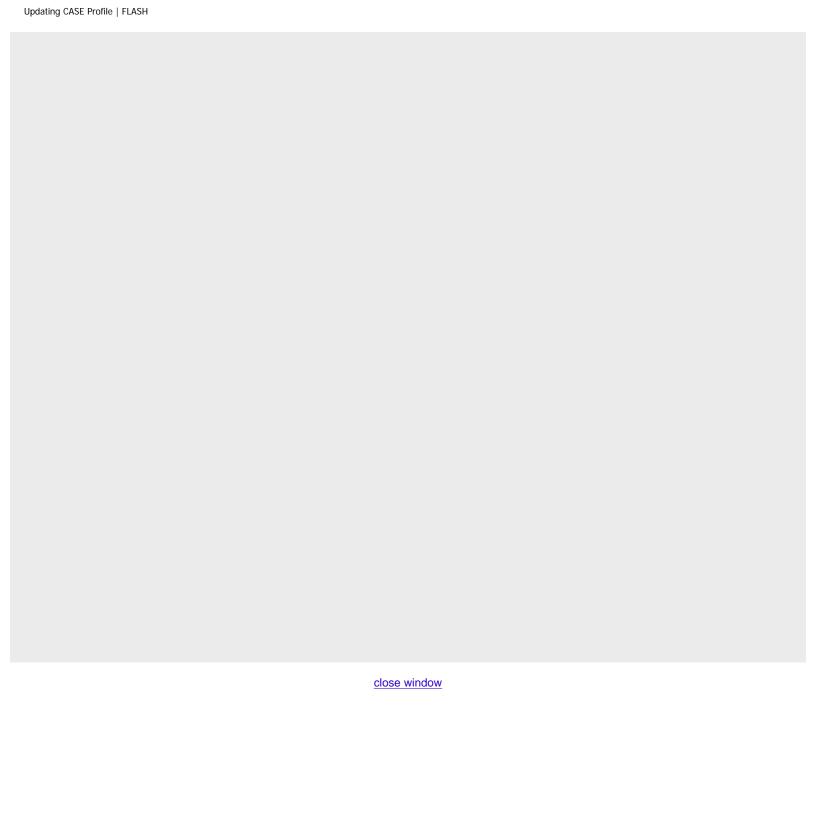
Time Zones: You can select your library's time zone, so all Status Information appears in your date and time. If a time zone is not selected, the default will be the CASE server's time zone (PST - Pacific Standard Time). Choose a time zone from the Time Zone drop-down menu and press Save.

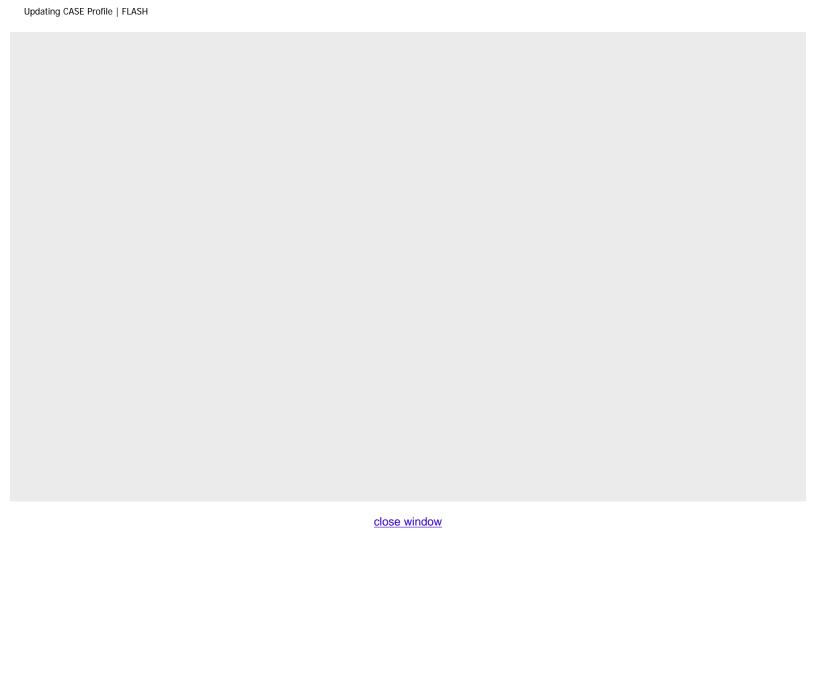




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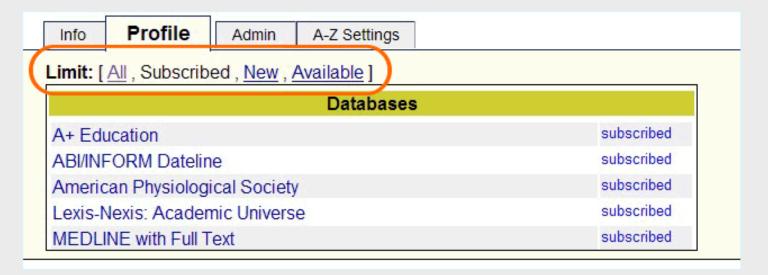




profile tab

The Profile tab allows users to define their library's journal collection from the list of subscriptions provided.

When a package is selected, you must create one or more rules that specify the titles and coverage for that particular package. When you have made changes to your profile, click the Request button to request an updated coverage load file from Innovative. There are four limits within Profiling:



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Subscribed The packages you have subscribed to and created rules for in CASE

New packages that are available

Available List of packages that you have not chosen as subscribed

To add a new group of titles to your CASE, you will need to take the following steps:

CLICK TO VIEW MOVIE ANIMATION

You can create a general rule:

CLICK TO VIEW MOVIE ANIMATION

Or a rule that is more complex, containing information such as date restrictions:

Please ensure that your browser allows popups from this site.

- 1. Select the limit you wish to utilize, and from that list, select the appropriate vendor package.
- 2. Click on the "Add New Rule" button
- 3. First, select the type of coverage you have. It will either be "All" or any combination of coverages you select from the list.
- 4. Next, select which of the titles in the package you have. Utilizing the "All", "Selected", and "All Except" radio buttons will make this task easier. If you choose either "Selected" or "All Except", a button marked "Select Titles" will appear. Clicking this button will open a new page that contains a title list.
 - 1. You can select titles one at a time, holding down the CTRL key on your keyboard, or you can select a list of titles by clicking on the first title, hold down the SHIFT key, and click on the last title in the list.
 - 2. After selecting the titles, click \"OK\" to add them to the title list.
 - 3. NOTE You may go back to the title list as many times as you like to add or delete titles before finishing the rule creation.
- 5. Finally, if you have any date restrictions for the journal package, you will need to enter those coverage dates now. If you have unrestricted access to the package, you may leave the date fields blank.
- 6. Once you have completed the adjustments to your rule, click the "Save" button at the bottom of the page. This will take you back to the summary page for that journal package, and allow you to view the rule you've created.
- 7. If you need to create more rules for that package, follow the steps in this list beginning with 2. If you are finished with the rule creation for this journal package, click on the "Profile" tab to return to the list of journals. The limit you had selected will be the limit you are returned to.

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coverage load

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The coverage file is an XML file that is sent to your Millennium server whenever you request. The file contains coverage information, such as start/end dates and URLs, on all of the titles to which you subscribe in each database. Your institution can load the most recent file into your Millennium coverage database on a regular basis.

There are two ways for your Millennium server to receive the coverage database file. The first way is to click on the Request button. CASE will then generate a file that will be sent to your Millennium server.

Launch the Millennium ERM module, and go to Coverage Load mode. Select the Catalog and Coverage check boxes. (See Page # 106010 of the Innovative Guide and Reference for more information on how the Catalog and Coverage options work: http://csdirect.iii.com/manual/gmil_covdb_processing_diagram.html You will see a button labeled "Get Case". Click this button and a pop-up box will display, showing your Desktop or My Documents files. The pop-up says "Save CASE file as...." Type in a name and choose a location where you'd like to save the CASE file on your local disk. The CASE file on the Millennium server is overwritten each time you request changes, so this gives you an opportunity to save a copy of the file you will be loading. Once you have saved the file locally, the CASE file is preprocessed and you can see the titles that will be loaded. You can select the "Process" button to load your coverage file. Please see Page # 105993 of the Innovative Guide and Reference for more information on Loading Coverage Data: http://csdirect.iii.com/manual/gmil_coverage_load.html



If your firewall prevents this file from reaching your server, you can use the second method, secure FTP.

Once you've moved the file to your local machine, you'll need to load it into Millennium. Follow the steps outlined above, but instead of choosing "Get CASE" select the "Browse" button. Find the locally saved file, Millennium will pre-process it, and you can select the "Process" button to load your coverage data into Millennium.



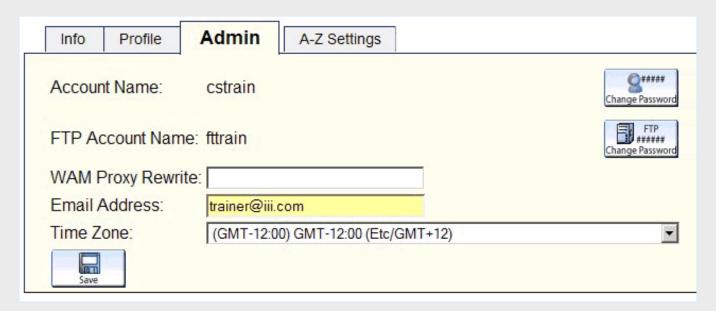


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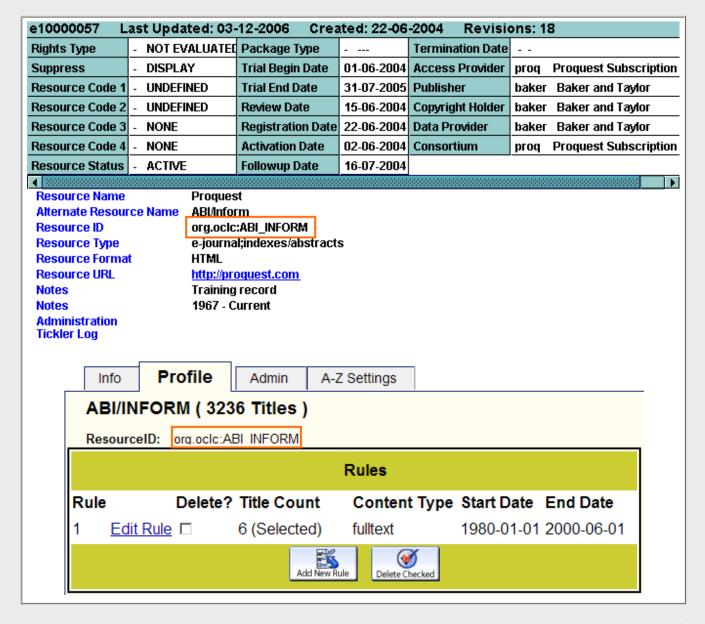
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case and erm resource records



When you are creating or editing a rule in CASE, you will see the CASE ResourceID for the package. This ResourceID is used as a matchpoint to Millennium resource records when doing coverage load:

- . This Resource ID links a resource record and license terms for that resource to a list of journal titles
- From a bibliographic record display a user (in Millennium or the WebPAC) can click to see resource and license information.
- A user can also search for a resource and see all the titles that are part of that database, with coverage dates and connection information.
- For coverage load to be successful, you will need a resource record with a Resource ID field that matches the CASE Resource ID.



The easiest way to set this up is to make sure the CASE ResourceID is set up in the resource record when profiling that database in CASE.

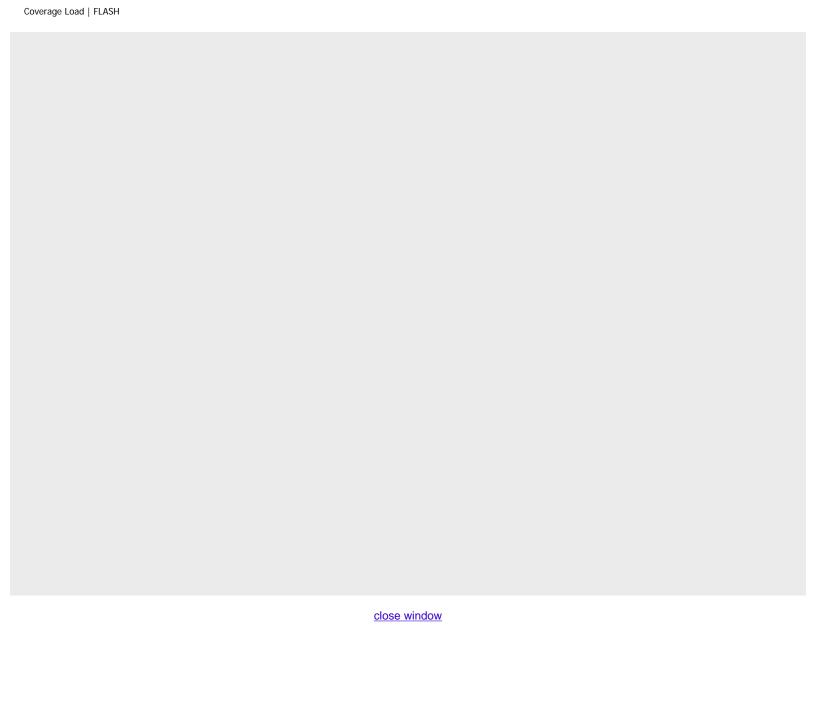
You can copy and paste the ResourceID from CASE into the Resource ID variable-length field in your resource record. See the ERM and CASE FAQs on CSDirect for more information: http://csdirect.iii.com/faq/#erm





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coverage load

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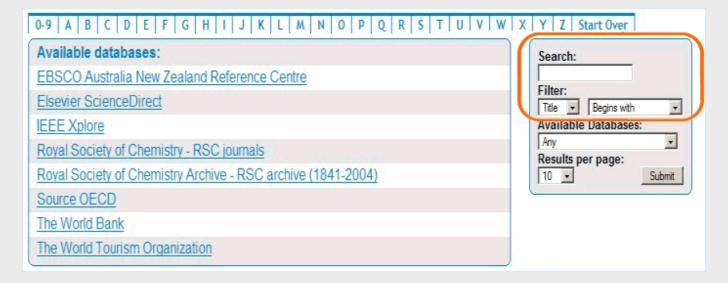
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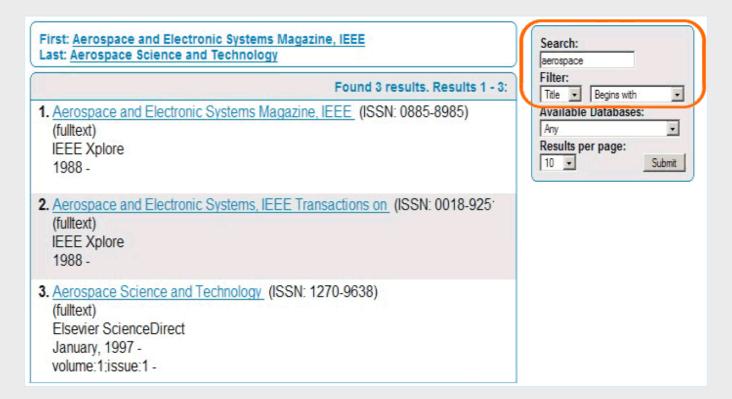
a - z list



The CASE A to Z interface allows the user to accurately browse a library's list of available e-journals online. This is fully customizable, can link to the catalog for print holdings and is hosted by Innovative Interfaces.



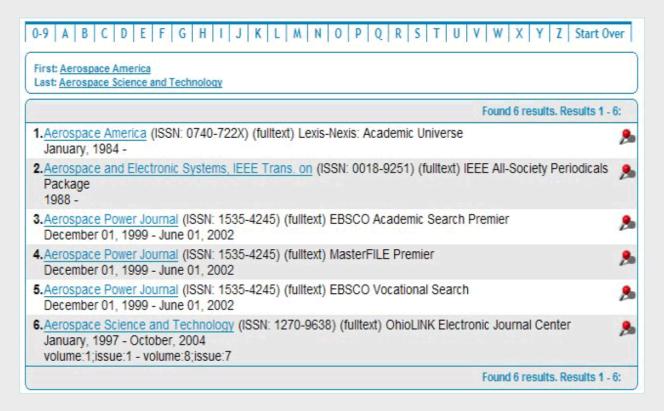
Users can also search by e-journal title:



Or filter by ISSN:



Once a hit list of titles has been found, users can click on the link to the e-journal or click on an icon (the red push pin in this example) to view print materials for the library's catalog.







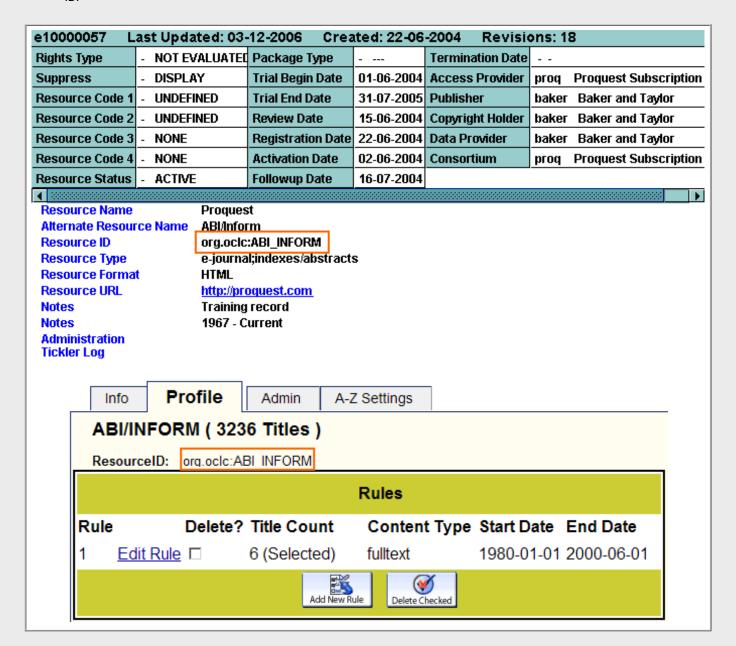
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coverage load

When you are creating or editing a rule in CASE, you will see the CASE ResourceID for the package. This ResourceID is used as a matchpoint to Millennium resource records when doing coverage load:

- . This Resource ID links a resource record and license terms for that resource to a list of journal titles
- From a bibliographic record display a user (in Millennium or the WebPAC) can click to see resource and license information.
- A user can also search for a resource and see all the titles that are part of that database, with coverage dates and connection information.
- For coverage load to be successful, you will need a resource record with a Resource ID.



The easiest way to set this up is to make sure the CASE ResourceID is set up in the resource record when profiling that database in CASE. You can copy and paste the ResourceID from CASE into the Resource ID variable-length field in your resource record. See the ERM and CASE FAQs on CSDirect for more information: http://csdirect.iii.com/faq/#erm

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a - z settings



Your A-Z list of all current subscriptions (determined by the profile you have created) is hosted on the CASE server. The URL is as follows: case.iii.com/iii/caseaz/home.do?site= is replaced with your library code

You can customize your A-Z list by logging in to the CASE server and editing the A-Z Settings tab:

Stylesheet URL: Enter a link to a style sheet you have selected to determine the look and feel of your A-Z list. The CASE A-Z list has a default style sheet that can be viewed but not edited: http://yourlibraryurl/screens.casear.styles.css You can view it, copy the style sheet, then override it by adding to or changing your new version. You can put the style sheet in your Millennium Administration Screens directory or another location, and enter the link in CASE.

Toplogo URL: Enter a link to a top banner file. Your toplogo.html file from Millennium may not work well here, since the CASE A-Z List is not a Millennium Catalog. Tokens, command links, etc. may not be interpreted correctly. Instead, the recommendation is to create a simple file with a library logo and some links back to your catalog and library web page.

Botlogo URL: Enter a link to a bottom banner file. Please see the information above in the Toplogo URL section for notes on what should be included in the file.

Local Search Icon: Enter a link to an icon (e.g. your library's logo or a search icon). This icon will be displayed next to each of the resources in your A-Z list search results. When this link is selected, an ISSN or title search will be performed in your library catalog for the associated resource.

ISSN Search URL: Enter the URL for the ISSN search of your library's indexes. This is will be used as the URL for the Local Search Icon when it is selected.

Title Search URL: Enter the URL for the title search of your library's indexes. This will be used as the URL for the Local Search Icon if no ISSN is available.



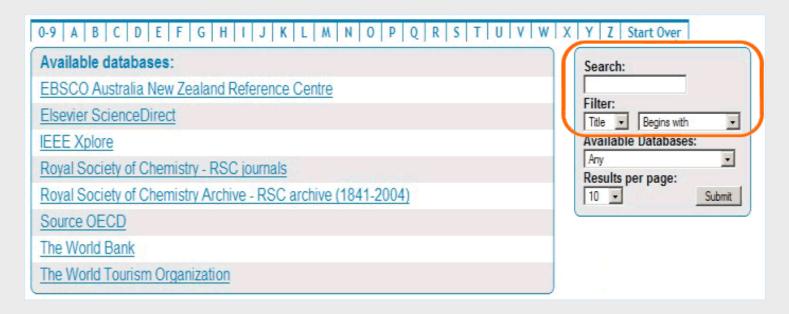


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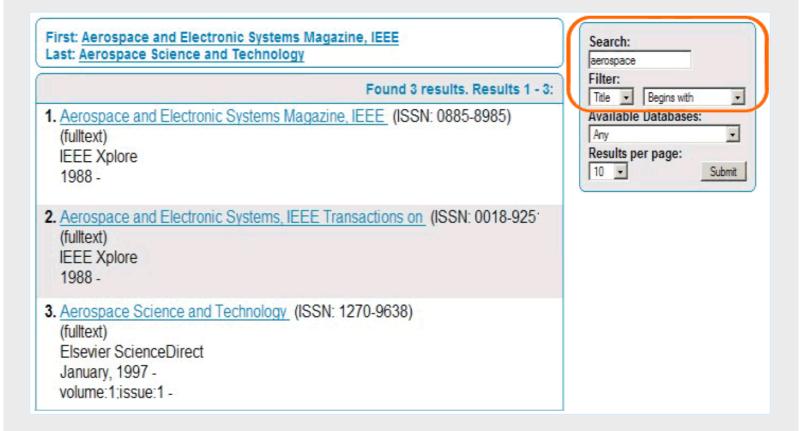
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a-z list

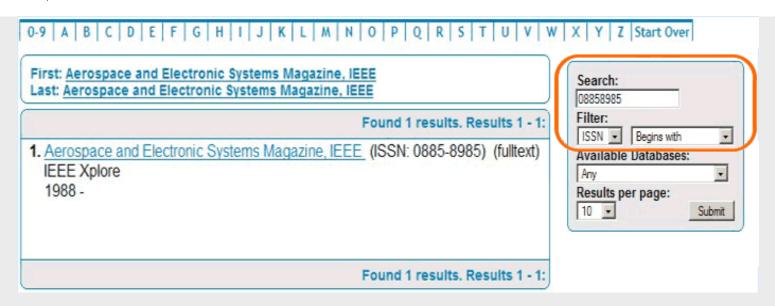
The CASE A to Z interface allows the user to accurately browse a library's list of available e-journals online. This is fully customizable, can link to the catalog for print holdings and is hosted by Innovative Interfaces.



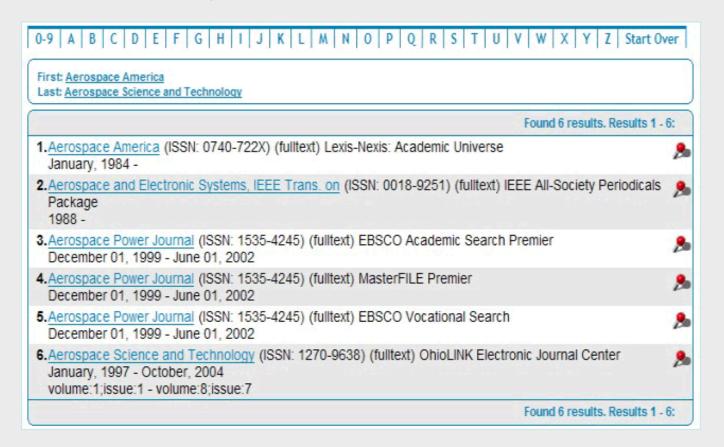
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comments



Thank you for using the CASE tutorial.

Please send comments on the tutorial or the product using the form below.

Name:

E-mail:

Library Name:

Site Code:

Please provide your comments:

✓ PREVIOUS ○



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a-z settings

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