

ERL WebSPIRS™ Administration Tool

User's Guide

WebSPIRS 5.0

SilverPlatter®

ERL WebSPIRS™ Administration Tool User's Guide

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WebSPIRS Administration Tool

About the WebSPIRS Administration Tool

The WebSPIRS Administration Tool allows you to configure WebSPIRS in your organization. It enables you to view and modify the different values in the various configuration files that WebSPIRS 5 uses. You can use the tool to configure WebSPIRS at a service, organization, and account levels.

Starting the WebSPIRS Administration Tool

Once you start WebSPIRS, you can start the WebSPIRS Administration Tool in your web browser.

To start the WebSPIRS Administration Tool:

1. Enter the WebSPIRS Administration Tool URL in your browser's address field:

```
http://<hostname>:<port number>/  
webspirs/admin/start.admin
```

- Use the hostname (or IP address) and port number (8595 by default) you specified during installation. You can use *localhost* for the WebSPIRS hostname if your browser and WebSPIRS server are running on the same machine.
 - Internet Explorer users must include **http://** in the URL.
2. The *Login* page opens, allowing you to login to the WebSPIRS Administration Tool. Select a server from the drop-down list and enter a valid username and password for the account on the server in the appropriate fields, then click the **OK**.

Logging In and Out

The Login page appears when you connect to the WebSPIRS Administration Tool with your web browser. (The URL address is provided by your librarian or system administrator.)

To log in:

1. Select the server that you want to connect to from the **Server:** drop-down list.
2. Type your user name and password (31 characters or less) in the appropriate fields. (See your librarian or system administrator if you don't have this information.)
3. Click **OK**

WebSPIRS Administration Tool displays a list of organizations.

To log out:

- Click **Logout** on the WebSPIRS Administration Tool toolbar.

Organizations

Default organization

The default organization consists of a number of settings. Some of these settings have pre-configured “factory” defaults. You can modify the values of these defaults and provide values for the settings that are not pre-configured. The default organization contains the service settings.

Organization configuration

Allows you to create a customized configuration that is appropriate for a particular organization.


An Organization inherits its initial values from the Default Organization.

To view the list of organizations:

- Select **All Organizations** from the **Show:** drop-down list.

The tool displays a list of the organizations.

To filter organizations:

1. Enter the name of the organization you want to display.
2. Click 

The tool displays only the Default organization and the organization whose name you specified.

To reset a filter:

- Click **Full List**.

The tool displays all the organizations.

To create an organization:

1. Click **New Organization**.

The tool prompts you for a **Name** and **Directory** for the new organization.

2. Enter a name for the organization.
3. Enter the directory where you want to save your new organization.
4. Click **Save Settings**.

The tool creates your organization and displays the list of organizations.

To delete an organization:

1. Select the organization you want to delete on the list of organizations page.
2. Click **Delete Organization**.

The tool warns you that you are deleting the organization.

3. Click **Delete Organization**.

The tool deletes the organization and displays the list of organizations.

Default Organization Settings

To access the default organization settings:

- Click **Default** in the list of organizations.

The WebSPIRS Administration Tool displays a list of the different types of setting and the service settings. For an explanation of each setting type click on one of the following setting types:

- service
- authentication
- access
- database
- general
- display
- print
- email
- save
- search
- sdi
- linking
- limit field

To change the default organization settings:

1. Click the setting type in the list.

The tool displays the settings for that setting type.

2. Deselect **Inherit value from factory defaults** for each setting that you want to change.

3. Change the settings as required
4. Click **Save Settings** on the WebSPIRS Administration Tool toolbar.

The tool saves your settings and displays the list of organizations.

Organization Settings

To access the settings for an organization:

- Click the name of the organization in the list of organizations.

The WebSPIRS Administration Tool displays a list of the different types of setting and the authentication settings. For an explanation of each setting type click on one of the following setting types:

- authentication
- access
- database
- general
- display
- print
- email
- save
- search
- sdi
- linking
- limit field

To change the settings for an organization:

1. Click the setting type in the list.

The tool displays the settings for that setting type.

2. Change the settings as required
3. Click **Save Settings** on the WebSPIRS Administration Tool toolbar.

The tool saves your settings and displays the list of organizations.

Accounts

Accounts belong to an organization. Several accounts can belong to one organization.

To view the list of accounts:

- Select **All Accounts** from the **Show:** drop-down list.

The tool display a list of the accounts.

To create a new account:

1. Click **New Account**.

The tool prompts you for a name for the account.

2. Enter a name for the new account.
3. Click **Save Settings**.

The tool creates the new account.

To delete an account:

1. Select the account you want to delete on the list of accounts page.
2. Click **Delete Account**.

The tool warns you that you are deleting the account.

3. Click **Delete Account**.

The tool deletes the account and displays the list of accounts.

To filter accounts:

1. Enter the name of the account that you want to display.

2. Click 

The tool displays only the default account and the account whose name you specified.

To reset a filter:

- Click **Full List**.

The tool display all the accounts.

Account Settings

To access the settings for an account

- Click the name of the account in the list of accounts.

The WebSPIRS Administration Tool displays a list of the different types of setting and the access settings. For an explanation of each setting type click on one of the following setting types:

- access
- database
- general
- display
- print
- email
- save

- search
- sdi
- linking
- limit field

To change the settings for an account:

1. Click the setting type in the list.

The tool displays the settings for that setting type.

2. Deselect **Inherit value from organization defaults** for each setting that you want to change.
3. Change the settings as required.
4. Click **Save Settings** on the WebSPIRS Administration Tool toolbar.

The tool saves your settings and displays the list of accounts.

Setting automatic login conditions for an account:

1. Click the account icon next to the account whose automatic login conditions you want to set.

The tool prompts you for an account password, IP range, and a referring URL.

2. Enter a password to use when automatically logging in.
3. Enter a range of IPs.
4. Enter a referring URL.
5. Click **Save Settings**.

The tool saves these settings as the automatic login conditions for the account.

Settings Reference

This section provides a reference guide for all the different settings that you can configure with the WebSPIRS 5 Administration Tool.

service

These settings apply to the whole WebSPIRS service. Many are directory names whose default values are pathnames relative to the directory **<webspirsinstall>/tomcat/bin**. You can also use absolute pathnames. Always use Unix-style (/) path separators.

Item	Description
History Directory	Enter the directory in which Search History files are placed.
SDI Directory	Enter the directory in which SDI files are placed.
SDI DTD Directory	Enter the directory in which the XML DTD used by SDI files resides.
Custom Directory	Enter the location of custom configuration directories.
Config Cache Size	Enter the size of the config cache.
Session Timeout	Enter the number of minutes that WebSPIRS keeps an inactive session open. After this period of time WebSPIRS 5 displays its session timeout page. Shortly after this the ERL Server session is disconnected.
Stored Session Expiry	Enter the number of hours, after which stored sessions are deleted. If a user's session times out the session state is saved. If they have not reactivated the session before this period of time elapses, the saved session is deleted. This value must always be longer than the Session Timeout.
Stored Session Expiration Interval	Enter the frequency, in minutes, at which stored sessions are checked for expiry.
DXP Login Enabled	Select Yes to enable DXP login.

Item	Description
Debug IP Address	Enter the range of IP addresses for which debugging is enabled.
Timing IP Address	Enter the range of IP addresses for which timing is enabled.
Timing Enabled	Select Yes to enable timing.
Maximum SDIs	Enter the maximum number of SDIs that a user can create. -1 means unlimited.
SDI Trigger Hour	Enter the hour (0-23) at which SDIs are run after an update notification is received. Allows SDIs to be run off-peak even if the update is added on-peak. If set to -1 then SDIs are run as soon as the update notification is received.
SDI Trigger Minute	Enter the minutes past the hour, specified in SDI Trigger Hour, at which SDIs are run.
Log Timing	Select Yes to enable the logging of timing information.
DXP Log IP Range	Enter the range of IP addresses for which DXP logging is enabled. For example, 0.0.0.0-255.255.255.255 means all IP addresses, and 12.34.56.* means all address in the subnet 12.34.56.
Trace Log IP Range	Enter the range of IP addresses for which system trace information is written to WebSPIRS.log.
Trace Log IP Timing	Enter the range of IP addresses for which system timing information is written to WebSPIRS.log.
Log DXP Type	Enter the type of DXP logging. This can be dxp, raw (to log the dxp byte stream unprocessed), or both.
Save State	Select Yes to allow WebSPIRS to restore active sessions if it is restarted. WebSPIRS saves the state of each WebSPIRS session after each search request. If WebSPIRS is restarted, the save sessions are automatically reloaded the next time a user makes a WebSPIRS request. If you select No , users must log in again if WebSPIRS is restarted.

Item	Description
Administrator Email Address	Enter the administrator's email address.
System Log Threshold	Select the type(s) of log event that will be written to the WebSPIRS log. You can select any combination Critical_Error, Error, Warning, Information, Detail, Trace(1), Trace(2), Trace(3), and Trace(4).
Language	Enter the default language. This should be a 2 letter ISO language code. Valid values are constrained by the availability of localized versions, but will include en (English), de (German), and es (Spanish).


authentication

These settings control how users are automatically authenticated.

Item	Description
Authentication Method	Specify to authenticate by IP address, and/or a referring page URL. Enter IP, URL, or both separated by a comma. If both are specified, the order is significant. WebSPIRS will try one, then the other.
Failed URL	The URL of a page to display if authentication fails.

access

These settings configure login, automatic logging in, open databases, and searching.

Item	Description
Per Server Settings	Click  to display and edit access settings when you have access to more than one server. The tool opens a new window displaying the Server Name for each ERL server that WebSPIRS is configured to access. You can display, edit, and add a new server in this window. Each server has a Suggested Username, Suggested Password, Jumpstart Username, and Jumpstart Password.

Item	Description
Allow Change Password	Select Yes to display the Change Password button on the login page and personal user login page.
Share User Names	Select Yes to use the same username and password on all servers.
Suggested Username	Enter the suggested username to display on the login page. This must be server qualified if Share Usernames is false and more than one ERL server is configured.
Suggested Password	Enter the suggested password to display (as ****) in the login page. This must be server qualified if Share Usernames is false and more than one ERL server is configured.
Jumpstart Username	Enter the username to use when logging in. You must also specify the Jumpstart Password.
Jumpstart Password	Enter the password to use when logging in. You must also specify the Jumpstart Username.
Jumpstart Databases	Enter the databases to open at startup. You can specify the databases by database identifiers (e.g., I(ML8A, ML8B)), set ids for a database family (e.g., S(ML,NU)), or a combination of the two.
Jumpstart Search	Enter the search to execute at startup. The search string must be URL encoded and the databases must be specified.
Help Desk Text	Enter the help desk text message to display. For example, "For Support Contact".
Help Desk Email	Enter the administrator email address to display.
Logout URL	Enter a full URL, including http:// and the port number, of the page to display after the user logs out of WebSPIRS.

database

These settings configure the database options.

Item	Description
Suggest Enabled	Select Yes to enable the suggest databases feature. The suggest databases feature may adversely affect ERL server performance.
Suggest Load Refresh	Enter the frequency, as a number of seconds, that the suggest databases page is refreshed while suggest databases is running.
Collapse Headers	Enter the indentation level of a database list after which the headers are initially collapsed.

general

These settings control general options.

Item	Description
Language	Enter the default language. This should be a 2 letter ISO language code. Valid values are constrained by the availability of localized versions, but will include en (English), de (German), and es (Spanish).
Hide Table of Contents Tab	Select Yes to hide the Table of Contents tab when it is disabled.
Logo Image File Name	Enter the name of the image file to use as the logo in WebSPIRS.
Logo Image Height	Enter the height, in pixels, of the logo image file.
Logo Image Width	Enter the width, in pixels, of the logo image file.
Search Tips Page	Enter the name of the HTML file that contains the search tips.

display

These settings control display options.

Item	Description
Maximum Records to Display	Enter the maximum number of records to show in the brief record display.
Default Displayed Fields	Enter the default fields to display. *D means database default fields. *F means all bibliographic fields. ! means exclude a field, e.g., *D,!TI means display all default fields except TI.
Field Label Type	Select the default field label type. You can select No labels, Short labels, Long labels, or Short and Long.
Display Results After Search	Select Yes to display the results after a search. Select No to display the search history after a search.
Sort Record Sets	Select Yes if you want WebSPIRS to attempt to sort the records by default after a search.
Sort Field	Enter the field that you want WebSPIRS to use when sorting the records.
Sort in Ascending Order	Select Yes if you want WebSPIRS to sort the fields into ascending order.
Maximum Records to Sort	Enter the default maximum number of records to sort.
Display Intermediate Results	Select Yes if you want WebSPIRS to display intermediate results in the search history, e.g., 'cat and dog' displays 'cat', 'dog', and 'cat and dog'.
Display Results By Database	Select Yes if you want WebSPIRS to display entries in the search history for each individual database, when searching against multiple databases

Item	Description
Choices of Number of Records to Display	Enter a comma separated list of numbers to display in the “Display n records at a time” drop-down list.
Choices of Number of Records to Sort	Enter a comma separated list of numbers to display in the “Only if fewer than n records” drop-down list.
Only Show Available Records	Select Yes if you want WebSPIRS to only display available records by default.

print

These settings control print options.

Item	Description
Enabled	Select Yes to allow users to print records.
Maximum Records to Output	Enter the maximum number of records that can be printed. -1 means there is no limit.
Default Output Fields	Enter the fields to print by default. *D means database default fields. *F means all fields.
Include Search History	Select Yes to include the search history in the printed output.
Include Record Number and Database Name	Select Yes to include record numbers and the database name in the printed output.
Clear Marked Records After Output	Select Yes to clear marked records by default after they are printed.

email

These settings control email options.

Item	Description
Enabled	Select Yes to allow users to email records.
Maximum Records to Output	Enter the maximum number of records that can be emailed. -1 means there is no limit.
Default Output Fields	Enter the default fields to email. *D means database default fields. *F means all fields.
Include Search History	Select Yes to include the search history in the emailed output.
Include Record Number and Database Name	Select Yes to include record numbers and the database name in the emailed output.
Maximum Size (in Kb) Before Splitting	Enter the maximum size, in kilobytes, allowed for an email or SDI message before it is split into several smaller messages.
Wrap Words	Select Yes to word wrap the emailed output.
Word-Wrap Width	Enter the column number at which to wrap words.
Default Subject	Enter the default email message subject field.
Default 'From' Address	Enter the default address from which emails are sent.
Maximum Number of Recipients	Enter the maximum number of email recipients that can be defined.
Default Email Destinations	Click ► to display, edit, and add the default email destination addresses.
SMTP Server	Enter the host name or IP address of a server that supports the SMTP mail sending protocol.
Default Mail Account	Enter the default account used to send emails.

Item	Description
Address of Administrator	Enter the administrator's email address, to which errors can be sent.
Email Log Threshold	Select the email log threshold. Errors more severe than this setting are emailed to the administrator. For example, if you select Warning, all Critical_Error, Error, and Warning log messages are emailed to the administrator. You can select Critical_Error, Error, Warning, Information, Detail, Trace(1), Trace(2), Trace(3), or Trace(4).
Clear Marked Records After Output	Select Yes to clear marked records by default after they are emailed.

save

These settings control the save options.

Item	Description
Enabled	Select Yes to allow users to save records.
Maximum Number of Records	Enter the maximum number of records that can be saved. -1 means there is no limit.
Default Output Fields	Enter the default fields to save. *D means database default fields. *F means all fields.
Include Search History	Select Yes to include the search history in the saved output.
Include Record Number and Database Name	Select Yes to include record numbers and the database name in the saved output.
Wrap Words	Select Yes to word wrap the saved output.
Word-Wrap Width	Enter the column at which to wrap words.
Clear Marked Records After Output	Select Yes to clear marked records by default after they are saved.

search

These settings control the search options.

Item	Description
Default Mode	Select the default search mode. This determines the tab that the user sees initially. You can select Search, Advanced, Thesaurus, Table of Contents, Index, or History.
Default Action	Select the default search action. You can select either Search or Suggest.
Thesaurus How Many Choices	Enter a comma separated list of numbers to display in the “number of thesaurus terms to show” drop-down list.
Thesaurus How Many Default	Enter the default number of thesaurus terms to show.
Compatible Thesauri	Enter a colon separated list of database families that have a compatible thesaurus. Compatible sets are separated by commas.
Index How Many Choices	Enter a comma separated list of numbers to display in the “number of index terms to show” drop-down list.
Index How Many Default	Enter the default number of index terms to show.
Search History Needs Personal Username	Select Yes to force users to switch to a personal username before they can save their search history.
Search History Save Enabled	Select Yes to allow search histories to be saved.
History Load Refresh	Enter the frequently, in seconds, at which the page is refreshed when loading search histories.
History Expiry Max	Enter the maximum period, in days, before a saved search history expires.
History Expiry Default	Enter the default number of days before a newly created search history expires.

Item	Description
History Expiry Grace	Enter the number of days a search history remains in the system after its expiry date before it is deleted.

sdi


These settings control SDI options.

Item	Description
Enabled	Select Yes to allow users to create SDIs.
Sdi Needs Personal Username	Select Yes to force users to switch to a personal user to create and view SDIs.
Maximum Records to Output	Enter the maximum number of records allowed in an SDI baseline search.
Default Output Fields	Enter a comma-separated list of field abbreviations to include in SDI emails.
Include Record Number and Database Name	Select Yes to include record numbers in SDI emails.
Default Administrator Address Selected	Select Yes to use the supplied default value for the SDI administrator email address.
Default Administrator Address	Enter the default administrator email address.
Expiry Default	Enter the default number of days before a newly created SDI expires.
Expiry Max	Enter the maximum life span, in days, of a newly created SDI.
Expiry Grace	Enter the number of days an SDI remains in the system after its expiry date before it is deleted.

Item	Description
Expiry Notification	Select Yes to ensure the SDI administrator is notified of an impending SDI expiration by email.
Expiry Notification Period	Enter the number of days before an SDI expires that the administrator is notified by email of the impending expiration.
Alerts Enabled	Select Yes to allow users to view and subscribe to alerts.
Alerts Administrator	Enter the username of the alerts administrator.


linking

These settings control linking options.

Item	Description
Full Text Fields	Enter the fields that provide links to the full text, in the order they are shown in the complete record and link popup.
Full Text Prompt	Enter the prompt displayed in the brief record display when records contain one of the fields specified in the item Full Text Fields that is not displayed.
Field That Hides Full Text Prompt	Enter the fields that when present in a record the prompt will not be displayed in the brief record display.
See Also Fields	Enter the fields that provide links to “See Also” sites, in the order they are shown in the complete record and link popup.
Linking Field Labels	Click  to display and edit the linking field labels.
Link format	Enter TEXT to display links as text, or SELECT to display links as a drop-down list.
Limit on Number of links for SELECT	Enter the maximum number of items that can appear in a drop-down list.

limit field

This setting controls how many custom limits can be displayed.

Item	Description
Maximum Number of Custom Limits Displayed	Enter the maximum number of custom limits to display.
Limit Fields	Click  to display and edit the Limit Fields. The tool opens a new window displaying the Filter, Field Name, Label, and Definition for each limit field. You can edit, delete, or add limit fields in this window.

Managing Personal Users

To access the Personal Users page:

- Click **Manage**.

The tool displays the list of the ERL users with expired Personal Users

To change expiry dates for Personal Users:

1. Select the ERL user whose Personal Users expiry date you want to change.
2. Click **Reset Dates**.
3. Enter the expiry date for the Personal Users.

The tool resets the expiry date of the Personal Users.

To delete Personal Users:

1. Select the ERL user whose Personal Users you want to delete.
2. Click **Delete Selected**.

The tool deletes the Personal Users for the selected ERL user.

To show Personal Users:

1. Select the ERL user whose Personal Users you want to show.
2. Click **Show Selected**.

The tool shows the Personal Users for the selected ERL user.

Displaying the Number of Logged In Users

To see how many users are logged in to WebSPIRS 5:

- Click **Users** on the WebSPIRS Administration toolbar.

The tool shows how many users are logged in to WebSPIRS 5.

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