ebrary Implementation Guide

Welcome, and thank you for subscribing to ebrary's Dynamic Content Platform (DCP)™!

Our goal is to provide your library with the content and technology that make the research experience richer and more productive.

Put simply, ebrary **DOES** research™.

Discover content from leading publishers
Optimize online viewing and navigation with the ebrary Reader™
Expand your research with InfoTools™
Save and manage research through a Personal Bookshelf and automatic citations
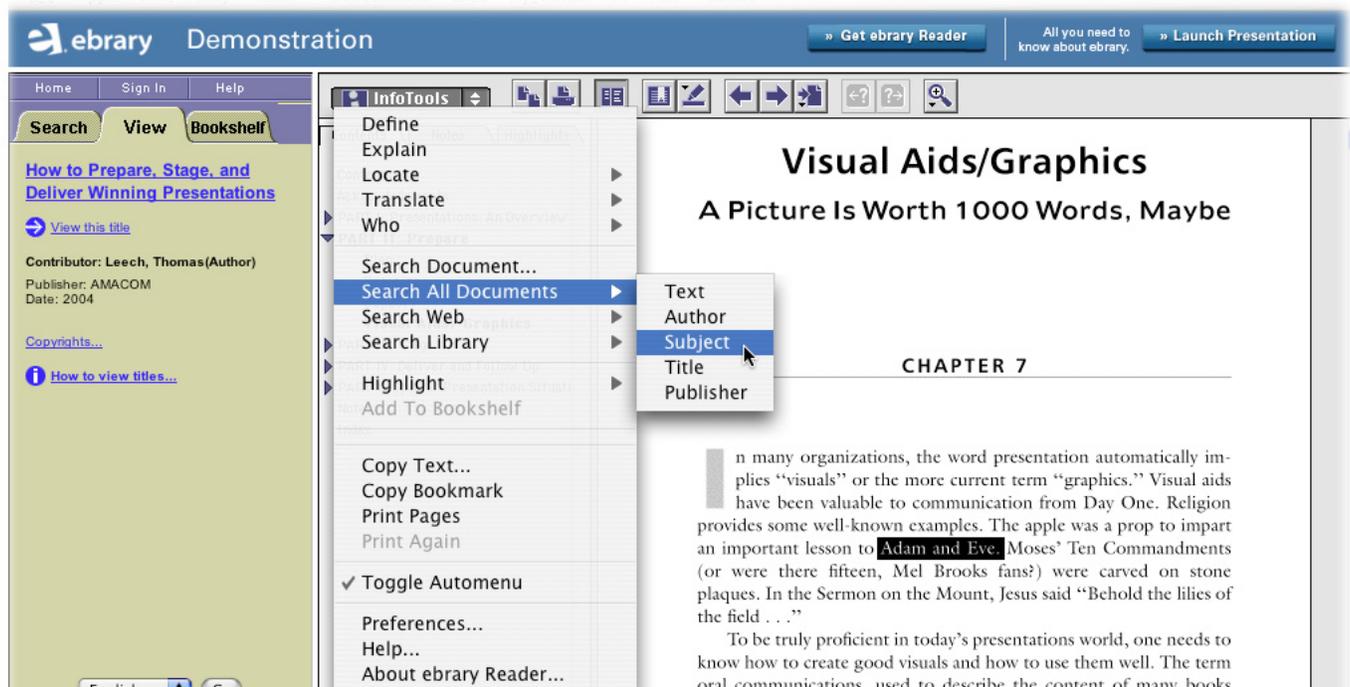
The following implementation guide provides a step-by-step overview on how to get started with your ebrary subscription. For additional information and assistance, please email your ebrary account manager at accountmanager@ebrary.com or call 650-475-8782.

We also encourage you to download and share our user guide, available at http://www.ebrary.com/corp/pdf/ebrary_Patron_User_Guide.pdf and our product brochures, available at http://www.ebrary.com/corp/content.

For an overview of the ebrary DCP, including how to use the ebrary Reader and InfoTools, please view the following Flash demonstrations:

- All about the DCP:
  http://www.ebrary.com/corp/demo/DCP.htm

- Using the ebrary Reader:
  http://www.ebrary.com/corp/demo/Reader.htm

- Checkout InfoTools:
  http://www.ebrary.com/corp/demo/InfoTools_reader.htm

We sincerely hope that you, your patrons, and staff enjoy your ebrary subscription and find it a valuable tool for conducting research quickly, easily and efficiently.

Contents

I: Basic ebrary Implementation Steps

If you are reading this document, you currently have an active ebrary Website. Your ebrary site is http://site.ebrary.com/lib/yoursiteidentifier. The site identifier is a 4-20 character word/acronym that was established by your administrative contact when the site was built and will be referred to in various places throughout this guide.

As an initial step, please make sure that you have received your library's partners or intranet username and password from your ebrary sales representative or account manager. You will need this information in order to access your library's reports, which are covered in Section V of this guide.

If you do not know your library's username or password, please email your sales representative or contact the account management team. The information you need will be sent to you via email.

To implement your ebrary subscription quickly and efficiently, please follow the steps below:

1. Download the ebrary Reader onto all Library Terminals and Patron Machines

The ebrary Reader enables documents to be delivered one page at a time to a user's desktop, eliminating cumbersome document downloads and the need for eBook reading devices. Anyone, regardless of bandwidth or connectivity limitations, can instantly access content in ebrary. Additionally, this unique software application gives ebrary all of its advanced research and navigational capabilities including InfoTools (see http://www.ebrary.com/corp/demo/InfoTools_reader.htm). InfoTools seamlessly links search queries to multiple online databases and information on the Web. See section "e" for further information about InfoTools as well as instructions on how to customize the InfoTools menu.

It is very important that the ebrary Reader is properly installed on your library's terminals in order for patrons to fully leverage the DCP's capabilities. Please contact your IT department to make sure that the ebrary Reader is installed and that it is included in their list of approved client software programs. If your library re-images machines yearly or each semester, the ebrary Reader should always be included.

Your IT department can either download the ebrary Reader onto each individual machine or use our standalone installer to do a mass installation. To download the ebrary Reader and install it on individual library terminals, please go to http://site.ebrary.com/lib/yoursiteidentifier/Download. Patrons may also use this URL to install the ebrary Reader on their own personal computers.

To perform a mass installation, ebrary will provide you with an .exe file that can be used within your existing mass deployment structure, or use command line instructions across domains. For more information about mass installations, please contact an ebrary account manager.

Note: We recommend turning off any pop-up blockers or allowing pop-ups for ebrary.com in order for InfoTools to function properly. If you have multiple browser toolbars (e.g., Yahoo, Google or IE, you may need to turn off multiple pop-up blockers.)

2. Integration and Access

a. Accessing ebrary

ebrary does not currently offer username and password authentication. We provide IP authentication which provides a higher level of security. ebrary requires that your IT department provide us with the appropriate campus IP ranges during the technical profile gathering process. If there are future changes to your IP authentication ranges, your IT department should contact an ebrary account manager. If possible, please notify us in advance to avoid any disruptions of service.

Note: You may also contact ebrary's customer support team at support@ebrary.com and receive a reply to your requests within 24 hours.

To further enhance the capabilities of DCP for your library, ebrary has developed a set of Application Programming Interfaces (APIs), called ebrary eXtend. Available under a separate license, the eXtend APIs enable libraries to customize the DCP's back-office functionality in order to better integrate with an existing IT infrastructure, including Web servers and application servers that manage remote patron access and single sign-on authentication access. For more information about eXtend, please contact your sales representative.

b. Using Proxy Servers

Because ebrary uses persistent, standalone, durable URLs, any proxy server that uses persistent URL rewriting will work with the ebrary DCP. RPA, EZProxy, and Innovative WAM are examples of proxy servers that use URL rewriting functionality. We will have detailed instructions on RPA and WAM implementation in future versions of our implementation guide.

Conventional browser-based proxy servers work with the ebrary DCP as well. However, Apache proxy rewriting modules will not work as they only do an initial URL rewrite.

For more information about how ebrary customer libraries are currently using EZProxy, and for detailed instructions, please visit the Useful Utilities Website at http://www.usefulutilities.com/support/db/ebrary.html. Please read this closely as it is a departure from the standard EZProxy.cfg entry.

Note: ebrary HIGHLY recommends using the full ebrary entry with SSL (either using a signed or unsigned certificate). This will allow remote users to work with the notes, highlights, and Bookshelf features. If this is not available with your EZProxy setup due to version or IT constraints, the basic ebrary EZProxy entry will allow remote users to view, copy, and print text.

c. Installing MARC Records

Along with putting ebrary promotional materials and product information links in prominent places on your library Website, loading MARC records will significantly increase traffic and usage of your ebrary DCP subscription, providing your library with a greater return on your ebrary subscription investment.

ebrary currently provides free MARC records for most content in our collection. Some publishers do not provide us with MARC records, and therefore these MARCs will be missing from your collection. We receive MARC records from a variety of sources and run authority control before making them available for download.

We also provide a customized 856 field in each MARC record that goes directly to the listed ebrary formatted

book title. ebrary records are in standard MARC21 format and have been integrated into Endeavor, Innovative, Sirsi, Sagebrush, VTLS, TLC, Dynix, CARL, and various other ILS vendor systems. If your ILS vendor is not listed, and you have additional questions regarding implementation, please contact an ebrary account manager.

ebrary can offer additional 856 field customization (i.e., with EZProxy/WAM configurations) at an additional cost. Please check with your sales representative or account manager for more information.

MARC records are made available through the partners. ebrary.com Website between the 15th and 20th of each month. Your library's designated cataloging contact (or any appropriate candidate) will receive an email from the ebrary account management team when records are available.

d. DCP Site Customization

ebrary makes it possible for you to customize and brand your DCP subscription.

Your site consists of three frames: left, right, and top.

Both the right-hand frame and the top banner are customizable by pages that are hosted by your library. Note that the top banner must be 42 pixels high, and all links must go out to a new browser window and cover the length of the page.

You may customize your site by building and hosting your own HTML banner with a logo and color scheme. Please send the URL to your account manager, and notify them if that URL should change. Hosting your own customized banner will also allow you to make changes at your convenience. For additional customization, please contact your account manager about ebrary's eXtend APIs.

We also recommend that you include informational links to our ebrary Reader and InfoTools Flash demonstrations and Patron User Guide when customizing the top or right-hand frame to further improve the user experience and increase usage.

A public example of ebrary site customization can be found at http://site.ebrary.com/lib/csli. If you have any further questions about site customization, please contact your account manager, accountmanager@ebrary.com.
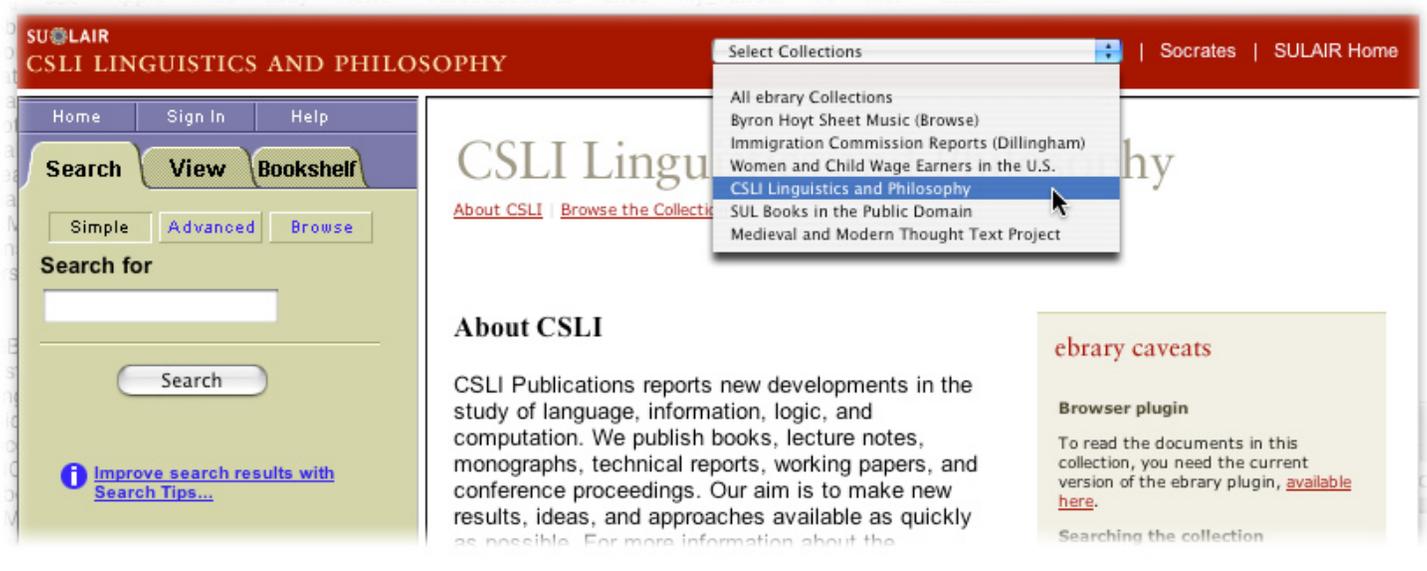
e. InfoTools Customization

A key feature of the ebrary Reader, InfoTools is a unique set of research utilities that link patrons to additional and relevant information by selecting any word, in any ebrary document. The InfoTools menu can be customized to seamlessly link patrons to other electronic database resources (i.e., periodical reference database or journal database) that use persistent, standalone, durable links as well as your OPAC and information on the Internet.

To customize the InfoTools menu, please provide your account manager with a full URL description of the third-party databases or Websites within/outside your university's firewall that you'd like to integrate. Your customized menu items will be added to your library's InfoTools configuration.

Two good examples of linking through InfoTools can be displayed with the Encyclopedia Britannica, http://search.eb.com, and Oxford English Dictionary, http://www.oed.com. These are two common links that libraries utilize to enhance definition and explanation features within InfoTools.

For more information about InfoTools, please click on the InfoTools Flash demonstration at http://www.ebrary.com/corp/demo/InfoTools_reader.htm.

f. Persistent Linking to ebrary Resources

Every ebrary link is persistent (also referred to as durable or standalone). This means that you can save an ebrary link in Microsoft Word as a hyperlink and add it into an online document as supplemental reading.

If you do not have an online catalog that supports MARC records, you may also use ebrary's persistent links to help your patrons find and access ebrary titles. To do this, just copy and paste the entire link.

An ebrary link to a book will look something like this:

http://site.ebrary.com/lib/yoursiteidentifier/Top?add.x=true&adv.x=true&c=all&d=all&f00=text&frf=subject&frm=adv.x&l=all&layout=search&p00=education&prf=Comparative+education.&sglayout=default

To link to specific pages in a book, you may use the "Copy Bookmark" feature on the InfoTools menu, then "paste" the URL into your application.
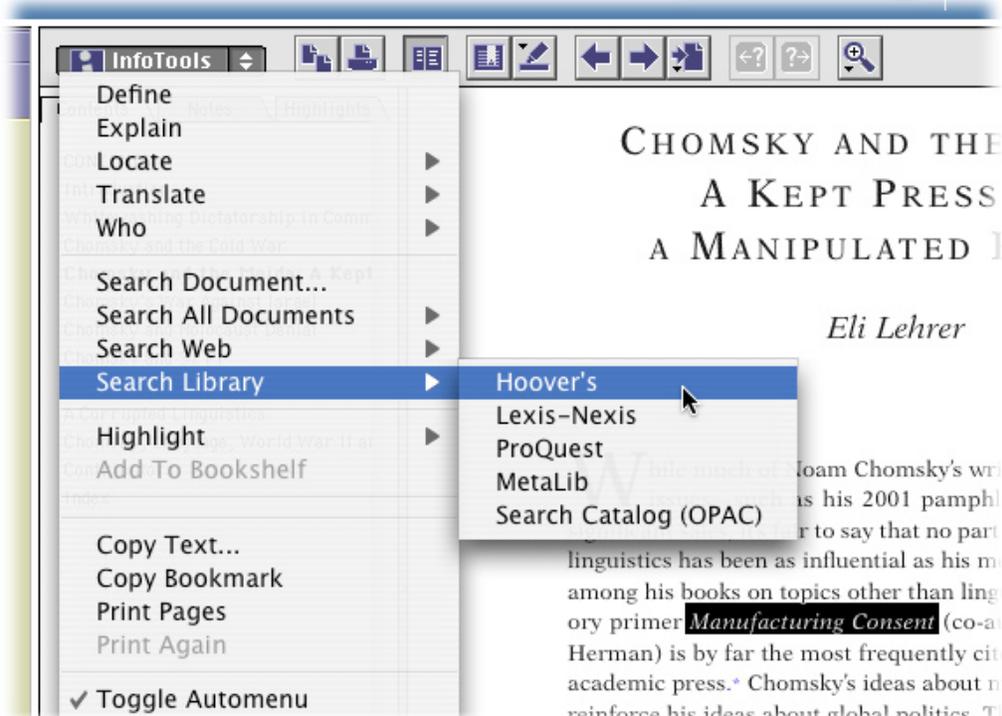
g. WebCT and Blackboard Integration

ebrary links can be used in both Blackboard and WebCT interfaces using referring URL and IP authentication. You will need to provide your account manager with the URL that is used for access so that it can be incorporated into your ebrary configuration.

To integrate ebrary content with WebCT:

1. Go to your ebrary link

2. You can either go back to your ebrary Bookshelf or search for a specific item. Once you find the book, go to the top of your browser and copy the entire URL to your favorite text editor (Word, Notepad, WordPerfect, etc). All ebrary URLs are standalone (you can copy and paste the link into a new browser and achieve the same result).

3. Go to your WebCT Webpage

4. Log in using your username and password

5. Click on the bookmarks button (located in the upper left corner)

6. Click on the create bookmark button in the personal bookmark section.

7. Copy the URL you had saved in step 2 and pasted it in the URL space. Be sure that you have the http:// at the beginning of the URL. Also, be sure to provide a descriptive label for you to remember. Click on the Add Bookmark button to save.

To integrate ebrary content with Blackboard:

1. Go to your ebrary link

2. You can either go back to your ebrary Bookshelf or search for a specific item. Once you find the book, go to the top of your browser and copy the entire URL to your favorite text editor (Word, Notepad, WordPerfect,

vi, (DELETE) etc). All ebrary URLs are standalone (you can copy and paste the link into a new browser and achieve the same result).

3. Go to your Blackboard link

4. Log in using your username and password

5. Go to the Control Panel option

6. Click on Web Resources

7. You can select either the Course Link or External Link option

8. Copy the URL you had saved in step 3 and paste it in the URL space. Be sure that you have the http:// at the beginning of the URL. Also, be sure to provide a descriptive label for you to remember, and that you save your link.

9. You can also use the Course Documents link from the control panel

h. Testing your Access to the ebrary DCP

Once your IP address is configured properly, and ebrary's account management team has provided you with a username and password for access to reports, then your ebrary subscription should be ready for use. To access your ebrary subscription, type in the following URL: http://site.ebrary.com/lib/yoursiteidentifier.

Please test the ebrary system more than once to make sure that you can search properly and that each component is working correctly, including viewing of the titles in the ebrary Reader and InfoTools.

II: Recommended Helpful Hints to Assist with Usage of the ebrary DCP

1. Product Training

We recommend that your entire library staff undergo Web-based training within the first 30 days of your subscription start date. This will help you fully understand the ebrary product and be prepared to answer questions from patrons. Even though the ebrary Reader interface is intuitive, and we have a Patron User Guide and Flash demos to assist with its navigation and features, ebrary Webinar training will provide a more comprehensive overview, enabling your staff and patrons to get the most out of the ebrary product.

a. Webinar Training Topics

1. Detailed review and instruction on how to use the ebrary search features

2. Detailed review and instruction on how to use the ebrary Reader toolbar features

3. How to create and use a Personal Bookshelf

4. Detailed review and instruction on how to use the ebrary InfoTools features:

   - Highlighting content
   - Annotating and notes
   - Bookmarking
   - Custom citations
   - Cut/copy/paste
   - Printing
   - Linking to additional resources within the ebrary database
   - Linking to additional resources through your ILS system
   - Linking to additional resources on the Internet
   - Using the Bookshelf features

5. Techniques that librarians, patrons, and professors can use for sharing their Bookshelves

6. Techniques that librarians, patrons, and professors can use for archiving content

7. Detailed review of how to access and use image based content

8. Detailed review of how to access and view ebrary usage reports

On average, Webinar training sessions take 60 to 90 minutes. However, they may take longer depending on discussions and questions.

b. How to Sign Up for Training

To sign up for a training session of the ebrary DCP and Reader, please email training@ebrary.com. A list of available times will be provided. ebrary often uses Webex to conduct Web-based training. Anyone with an Internet-connected desktop in your library may participate. We recommend that you install the Webex client software on your computer prior to your training date.

Once you register, an ebrary account manager will send out a confirmation email that contains a link to the Webex software download along with a password and a teleconference dial-in number.

We recommend that the training session be held in a classroom type setting (more than one computer with the ebrary Reader already installed on each machine), and that you turn off any pop-up blockers. If you have any trouble installing the ebrary Reader, please contact your sales representative or an ebrary account manager.

III. Common Questions about the ebrary Reader and DCP

I cannot see ebrary content when I click on a title. I get a red X in the corner, is there a problem with the content?

This issue occurs when the ebrary Reader is either unable to be installed within your browser, or the download of the Reader is being blocked by a firewall on your network. To solve these two issues please do the following:

a. Type in the URL, http://site.ebrary.com/lib/anysite/ Download to install the ebrary Reader.

b. Have your IT manager contact an ebrary account manager to receive a CD with the Reader installed on it. This will enable you to install the software on the network from the behind your firewall.

Do I have to download the ebrary Reader each time I access the product?

No, you should only have to download the ebrary Reader once unless the PC in your library has been re-imaged.

Does ebrary support Mozilla?

Yes, ebrary now supports Mozilla browsers, both the conventional and Firefox builds.

Does the ebrary Reader support Linux?

ebrary is actively working on a Linux solution that will be available by the end of September 2005.

Does ebrary Reader support the Macintosh operating system?

Yes, ebrary does support Macintosh operating systems from 9.04 to present. You do have to manually download the ebrary Reader software onto your Macintosh desktop from http://site.ebrary.com/lib/ yoursiteidentifier/Download.

How can I do a mass deployment of the ebrary Reader?

ebrary can provide your library with an .exe file that you can use within your existing mass deployment structure, or use command line instructions across domains. For more information on how to perform this function, please contact an ebrary account manager.

Can the ebrary Reader be networked?

No, the ebrary Reader cannot be "networked." Individual registry entries are imbedded in each individual computer. Please note that unless the machine is re-imaged, you should only have to download the ebrary Reader once.

IV. Troubleshooting Patron Issues

When patrons are unable to view ebrary content, and you are sure that they should be authenticated (via IP or remotely), please follow these troubleshooting steps:

First, ask the user for an error message if one has not been provided.

If the user is getting an Unauthorized Access message, please ask them to do the following:

1. Make sure their browser is configured to accept all cookies (Tools, Internet Options, Security).

2. If they are running firewall software (Norton, McAfee, TrendMicro are all popular brands), make sure that they are using the medium or low setting, and are allowing all requests from ebrary.com.

3. If they are using Windows XP, Internet Explorer, and Service Pack 2, please ensure that they have enabled Active-X controls.

4. Please have the user go to http://site.ebrary.com/validate, then email the results to ebrary support or account management if the items above have been checked. ebrary can then double check the IP address and do additional troubleshooting.

5. Ensure that all pop-up blockers are turned off (Google, Yahoo, Internet Explorer ,and Alexa toolbars have popup blockers, as does Service Pack 2 for Windows XP).

If the user is able to access the site and search for content, but getting a white screen and a box with a red X in it after they click on a title, then the ebrary Reader is not loaded or is being blocked. At this point, they should double check that the steps above have been completed and then do the following:

1. Make sure they have permission to install programs.

2. Ensure that all pop-up blockers are turned off (Google, Yahoo, Internet Explorer, and Alexa toolbars have popup blockers, as does Service Pack 2 for Windows XP).

If the user has permission to install programs and has allowed pop-ups, an ebrary Reader dialog box should appear within 15-20 seconds.

V. Reporting and Channel Usage

ebrary reports provide valuable information about how our collections are being used while protecting end-user privacy. Our reporting features are available on a monthly basis, and updates to the library's usage statistics are available on the 5th of each month.

Here are the basic instructions for accessing ebrary reports:

1. Go to http://partners.ebrary.com.

2. Click on the library tab.

3. Log in using the username and password provided by account management or your sales representative.

4. If you do not know your library's username or password, please email your sales representative or contact the account management team. The information you need will be sent to you via email.

Here is a brief summary of the reports that are currently available:

1. Site Activity by Summary

The Site Summary Activity Report measures activity on your library's DCP subscription. This report allows you to select one or more subject (BISAC) categories to be included in the summary report and allows you to further summarize by calendar date, calendar month, and day of week.

Activity reports include:

1. Number of sessions

2. Documents viewed

3. Page views

4. Pages copied

5. Pages printed

From date:	From 06-2004 to Date
Subtotal by:	By Calendar Month.
Category:	All Categories.

Date	User Sessions	Documents Viewed	Pages Viewed	Pages Copied	Pages Printed
6-2004	1129	1042	7341	199	1374
7-2004	1036	893	9902	220	1779
8-2004	2584	2149	22267	548	3405
9-2004	1846	1567	15614	879	2330
10-2004	2023	1724	21019	854	3014
11-2004	1301	1100	12015	617	3923
12-2004	527	457	5150	298	1334
1-2005	1305	1142	12460	345	2021
2-2005	1033	897	8213	338	4575
3-2005	3953	3238	36193	1482	6769
4-2005	4492	3736	50192	2632	5063
5-2005	5280	4394	55807	2551	7470
6-2005	2348	1978	22941	800	3346
7-2005	42	38	302	4	29
Total	**28899**	**24355**	**279416**	**11767**	**46432**

2. Site Activity by Category Detail

This report summarizes activity on your library's channel for a time period that you select. It breaks out the activity for that period by top-level BISAC category.

Activity reported includes number of sessions, documents viewed, page views, pages copied, and pages printed. Unlike the Site Activity Summary report, this report does not allow you to break down the summary by calendar date or day of week.

From the resulting report, you can drill down to view the statistics broken out for each detailed BISAC entry within main categories.

Date: **From 06-2004 to Date**

Category	Documents Viewed	Pages Viewed	Pages Copied	Pages Printed	User Sessions
ARCHITECTURE	92	759	14	707	122
ART	84	1018	37	74	96
BODY, MIND & SPIRIT	10	40	0	0	10
BUSINESS & ECONOMICS	7510	97785	4992	12006	8799
COMPUTERS	1931	29736	883	6485	2266
CRAFTS & HOBBIES	1	13	0	0	4
DRAMA	5	80	0	35	5
EDUCATION	2282	23758	1374	2778	2529
FAMILY & RELATIONSHIPS	115	1525	62	134	126
FICTION	56	413	4	11	60
FOREIGN LANGUAGE STUDY	223	2672	75	459	271
HEALTH & FITNESS	65	1075	13	31	77
HISTORY	855	7759	278	750	946
HUMOR	1	2	0	0	1
LANGUAGE ARTS & DISCIPLINES	2301	28615	1313	4101	2776
LAW	229	1922	96	93	240
LITERARY COLLECTIONS	17	165	21	0	17

3. Site Activity by Subnet

The Subnet report measures activity on your library's channel by IP block (going to class C level). With this report, you can see which areas of your library/campus are using ebrary most frequently.

Subnet	Date	Documents Viewed	Pages Viewed	Pages Copied	Pages Printed	User Sessions
12.145.15.*	Entire Period.	12	15	0	0	13
128.195.131.*	Entire Period.	3	69	2	0	3
129.118.121.*	Entire Period.	6	29	2	0	6
130.191.152.*	Entire Period.	11	56	3	0	11
131.231.24.*	Entire Period.	5	127	5	0	6
134.225.1.*	Entire Period.	2	12	0	0	2
142.179.218.*	Entire Period.	2	10	1	0	2
151.121.225.*	Entire Period.	1	3	0	0	1
158.125.1.*	Entire Period.	6	202	4	0	9
159.134.216.*	Entire Period.	4	18	1	0	4
159.134.245.*	Entire Period.	17	165	4	0	17
167.165.20.*	Entire Period.	10	38	4	9	12
167.165.23.*	Entire Period.	112	932	53	2	132
195.137.70.*	Entire Period.	2	13	0	0	2
198.87.131.*	Entire Period.	1	11	0	0	1
199.165.188.*	Entire Period.	2	13	1	0	2
205.219.211.*	Entire Period.	1	1	0	0	1

4. Title Activity Summary

The Title Activity report summarizes activity for each title accessed in the time period you select. The Title Activity Report includes the number of page views, pages printed, pages copied, and distinct user sessions accessing a specific title.

Making Sense of Change Management : A Complete Guide to the Models, Tools and Techniques of Orga

Author:	Cameron, Esther(Author)
Subject:	BUSINESS & ECONOMICS
Publisher:	Kogan Page, Limited

Usage Statistics

Sessions:	44
Page Views:	1039
Copies:	80
Prints:	240

Project Management for Business Professionals: A Comprehensive Guide

Author:	Knutson, Joan(Editor)
Subject:	BUSINESS & ECONOMICS
Publisher:	John Wiley & Sons, Incorporated

Usage Statistics

Sessions:	21
Page Views:	182
Copies:	6
Prints:	18

5. Getting MARC Records

After the reports you will find the ebrary MARC records, with the newest records at the top of the list.

The first group is a cumulative initial batch, with updates being provided in subsequent months. Added MARCs are brand-new records, Deleted Records contains records that should be removed from your system. Note that any customized records (EZProxy, 949 fields, etc) are not located on this site at this time. Please your account manager if you have any questions.

6. Promoting and Supporting your ebrary Subscription

There are various ways to promote your ebrary DCP subscription internally and externally to patrons and staff. Most libraries place a direct link to ebrary on their Website. ebrary also suggests adding the following links:

a. Get the ebrary Reader: http://site.ebrary.com/lib/yoursiteidentifier/Download. This link enables patrons to download the ebrary Reader for remote patron access.

b. Flash demonstrations that provide an overview and show how to use ebrary features:

   1. All about the DCP:
      http://www.ebrary.com/corp/demo/DCP.htm
   2. Using the ebrary Reader:
      http://www.ebrary.com/corp/demo/Reader.htm
   3. Check out InfoTools:
      http://www.ebrary.com/corp/demo/InfoTools_reader.htm

c. Patron User Guide: http://partners.ebrary.com/res/Patron%20User%20Guide.pdf. This link enables patrons to download a document that provides an overview of ebrary's key Reader and InfoTools features.

d. Brochures: http://www.ebrary.com/corp/content.htm. This link provides access to ebrary's DCP brochure and collection inserts.

e. Online Help: This link is provided within the ebrary Reader user interface, and includes text, Flash demonstrations about the features of the product, and Frequently Asked Questions (FAQs) which are updated quarterly. Patrons may click on the Help icon within the ebrary Reader to learn more.

Upon request, ebrary can provide your library with stand-alone executable files of our Flash demos that may be placed onto your library's home page as tutorials for your staff and patrons. We can also show you how to frame our Web pages and product marketing materials. Please contact your account manager to find out how to integrate ebrary links and product marketing materials within your library.

VII. Contacting ebrary

Account management team

accountmanager@ebrary.com

650-475-8739

Customer support

support@ebrary.com

650-475-8782

Library sales representatives

For a listing go to

http://www.ebrary.com/corp/contact.htm