

Resource Sharing System **Release Notes**

Release 3.0 Beta 1



Ameritech Library Services

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Enhancements

This section summarizes the new features added to Resource Sharing System with the 3.0 release. This section does not cover the enhancements in detail.

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Installing RSS 3.0 Beta 1

This section contains:

- important information to sites that are planning to convert their RSS database to MS SQL Server
- explanations regarding changes made to the RSS server and workstation installations
- general information about the new RSS Web Service
- information about applying the Web Service Patch after you have installed the Web Service.

RSS 3.0 Beta 1 and MS-SQL

The RSS 3.0 beta includes support for MS SQL Server, however it does not yet include an automatic method for converting an MS Access database to a MS SQL Server database. You should plan to upgrade to RSS 3.0, keeping your database as MS Access during the upgrade to RSS 3.0 beta1. After the upgrade of the RSS software and MS Access database are completed, Ameritech Library Services can supply you with instructions for migrating the data in your MS Access database to a MS SQL Server database.

Changes to the RSS Server and Workstation Installations

Here is a list of changes to the RSS Server and Workstation Installations:

- There are now three setup programs, one each for the RSS Protocol Service, RSS Web Service, and RSS workstation. As before the RSS Protocol Service install creates a copy of the RSS Workstation setup program that you should use to install the RSS workstations. This mechanism permits the Protocol Service setup, which installs the database, to create a “dbloc.txt” file that can be read by the workstation setup and used instead of prompting the person installing the workstation.

- Unlike previous releases the RSS Protocol Service setup does not install any part of the RSS Web service; that is handled by a separate setup program. Consequently the RSS Protocol Service setup does not prompt for WWW Port number. In addition the three POP server fields have been made optional since these values are not required for all sites.
- If you are installing for an MS SQL database, use the ODBC control panel applet to re-configure your System DSN for the ILL datasource as follows:
Select the System DSN tab and highlight the “ILL” entry.
Press the “Configure” button. This opens the “Microsoft SQL Server DSN Configuration” wizard.
Press “Next” twice to get to the page that has the choice “Create temporary stored procedures for prepared SQL statements...” This is selected (checked) by default and you should, due to a problem with Microsoft's ODBC drivers, turn this off.
- The RSS workstation setup is essentially unchanged aside from supporting installation of MS SQL Server ODBC drivers. If you are installing for an MS SQL database, you will have to re-configure the ODBC User DSN on each workstation machine just as you had to do after the protocol server installation, to disable the use of temporary stored procedures.

Information about Installing the RSS 3.0 Web Service

The RSS Web Service setup installs the Apache web server for NT, Perl, Perl ODBC, and the RSS Perl scripts. If you already have installed the Ameritech "HTML" WebPAC product you should omit installation of the Apache Web server and the Perl package.

IMPORTANT

This version of the RSS Web Service install is currently set up to install all 4 components listed above. If you do not need Apache, uncheck it, run the installation program, and then follow the instructions later in this section to apply the Web Service Patch. If you don't need to install either Apache or Perl, skip the installation program altogether and just follow the directions below for the Web Service Patch.

The RSS Web Service will also work with MS Internet Information Server and should work with the Netscape web server (however that has not yet been tested). However, as installation environments vary greatly with web servers and all situations may not have been anticipated, you should make certain you have a full backup of your NT system before installing the RSS Web service on any NT system which already has a web server or the Perl or Perl ODBC packages.

Applying the Web Service Patch

After installing the RSS Web Service, you will need to apply a patch to the script files so that the Web Service will work correctly. The patch consists of several files. Unzip the patch files into a temporary directory. Use this chart to apply the files you need:

Patch Files	If Apache was installed through RSS Web Service Install program	If Apache or other web server was previously installed
.tpl and .pl files	First locate file RSSpwsMain.pl in your Apache/cgi-bin directory. Copy, or make a note of the first line in that file (this is the path to your perl.exe file). Copy the .tpl and .pl files from this patch over the existing ones in your cgi-bin directory, then change the first line of the new RSSpwsMain.pl file to be the same as it was in your original version.	Copy these files into your cgi-bin or other executable directory.
ReadDBInfo.exe	No action required	Same as above

Patch Files	If Apache was installed through RSS Web Service Install program	If Apache or other web server was previously installed
Index.html	No action required	If you'd like the "RSS Patron Empowerment" screen to be your main screen when people go to your website, copy this file into your main directory (usually an "htdocs" or similarly-named directory). You might want to rename the existing index.html file in that directory if one exists. If you don't wish to replace your existing index.html file, you can rename the RSS one before copying it in. You would then need to change the link to index.html within the overview.htm file mentioned next.
Overview.htm	Copy this file over the existing file in your Apache/htdocs directory.	Copy to the same directory as index.html.
Isc83.gif	No action required	Copy to the same directory as index.html.

Patch Files	If Apache was installed through RSS Web Service Install program	If Apache or other web server was previously installed
	No action required	<p>If you installed your own web server, make sure that it is set up to run CGI programs, and that the directory from which you will be running the RSS scripts (cgi-bin or other) is set up as an executable directory. Options that need to be set within the Apache configuration file(s) are:</p> <ul style="list-style-type: none"> • Options ExecCGI • ScriptAlias /cgi-bin/ "your path to cgi-bin" • AddHandler cgi-script .cgi • AddHandler cgi-script .pl

Patch Files	If Perl was previously installed but not from the RSS Web Service install program
Odbc.pm	Copy this file into your perl\lib\win32 directory. This could also be something like perl\site\lib\win32 or perl\lib\site\win32. If there is no "win32" directory, create one.
Odbc.dll	If you are using a "core" version of Perl, copy this file into an "odbc" directory (create one if necessary) off of your auto\win32 directory.
Odbc.pll	If you are using a "non-core" version of Perl, such as ActiveState's ActivePerl, use this file rather than odbc.dll, but copy it into the same "odbc" directory mentioned above.

After you have applied the patch, do these steps:

- 1 Choose **Start, Programs, Apache Web Server** to start the Apache Web Server.
If you are using a different web server, make sure it is running.
- 2 Point your browser to your RSS server machine name to bring up the “RSS Patron Empowerment” screen.

Extracting Holdings Data During Z39.50 Searches

RSS will now extract the location, call number, copy number, statement of availability, and public note holdings data. RSS extracts this information when a MARC overlay is performed following a Z39.50 search on a local catalog. This feature works when you perform a MARC overlay from a Z39.50 search of the Local Library Unit that is assigned to the request.

- A new button called “Holdings Info” has been added to the Z39.50 Search Properties tab on the Local Library Unit Properties dialog box. This button displays the Holdings Information dialog box.
- A new dialog box called “Holdings Information” has been added. It is invoked by clicking the Holdings Info button. From this dialog box you can tell RSS where to get holdings information from your local catalog (bib record, holdings record, no data available), and from which tags and subfields to get the holdings data (Location, Call Number, Copy Number, Availability, and Public Note).
- Choosing either Fill Blanks or Replace from the MARC Overlay button will now extract the Location, Call Number, Copy Number, Availability Information, and Public Note data from the selected source and put it in the Call Number field on the Search dialog box.

This new functionality works in both Borrowing and Lending mode:

- **Borrowing Mode:** Lets you add local holdings information to the request for inclusion in Rejection notices so patrons know where the item is in your collection.
- **Lending Mode:** Lets you find the item in your local catalog so that you can quickly fulfill the lending request.

Support for 3M Checkout/Checkin

You can now use barcode scanners (that are connected to your library system via the 3M protocol) to check ILL materials in and out of your institution. You must have already installed and set up the 3M Standard Interchange Protocol to work with your library's circulation system for this feature to work.

- The Circulation Protocol tab has been added to the Local Library Unit dialog box. This tab lets you set up RSS so that it will work with the 3M Protocol and your local circulation system. The Circulation Protocol tab has these options that set up RSS to work with 3M:

Connection type. Choose how RSS connects to the 3M server.

Host Address. Enter the IP address of the 3M server machine.

Port. Enter the port number that the 3M server machine uses.

Timeout. Enter the number of seconds that the RSS workstation will wait for a response from the 3M interface.

Error Detection. Mark this box if your 3M interface requires that 3M Standard Interchange Protocol error detection be used.

Errors in screen line. Mark this box if you want RSS to use screen lines as the source of 3M error messages.

Support for Remote Patron Authentication

You can now set up RSS web interface so that it will authenticate remote patrons when they attempt to submit ILL requests or check on ILL request statuses. You must have already installed and set up the Remote Patron Authentication (RPA) software from Ameritech Library Services for feature to work.

- Two fields (Host Address and Port) have been added to the Circulation Protocol tab of the Local Library Unit dialog box.

Host Address. Enter the IP address of your RPA server.

Port. Enter the port number the your RPA server uses.
- If you do not have the RPA software, call the RSS Support staff. RPA software is available for circulation systems from Ameritech Library Services and from other vendors.

Ship and Check-In Tasks

Several tasks relating to shipping and checking in items have been added to RSS 3.0.

Batch Ship and Ship Tasks

- The task previously known as “Picked” has been renamed to “Batch Ship”. This is not to be confused with the “Picked” status. Requests having the status Picking can now have the Ship task run on them. Once this task has been completed for a request, the request’s status changes to Picked.
- The Batch Ship task has been added. This task lets you ship more than one request out at a time without having to individually select a new request. This task has also been integrated with the new 3M checkout capabilities of RSS 3.0.
- A new Batch Ship dialog box had been added. It is displayed when you run the Batch Ship task. You use the Batch Ship dialog box in this manner:

Enter a Request ID and click (or press on the keyboard) Enter.

After each request ID is entered, RSS will attempt to check out the item via the RSS 3M protocol support. If the checkout is successful, RSS displays the new Shipping Details dialog box, with the Responder Due Date filled in.

Finish entering the necessary information in the Shipping Details dialog box. See the next bullet for more information about the Shipping Details dialog box.

Click Ship. The request is given the status Shipped, and RSS displays the Batch Ship dialog box again so you can enter another request ID.

- A new Shipping Details dialog box has been added. It is displayed either by running the Ship task or by running the Batch Ship task. The Shipping Details dialog box has these options:

Bibliographic Details list. Displays the bibliographic details about the request you are shipping.

Ship Via. Enter the shipping method for this item. This field is required.

Responder Due Date (Loan Request only). Enter the date this item is due back at your institution. This field is required.

Insure For (Loan Request only). Enter the amount that this item is insured for. Enter 0 if you do not need to insure this item. This field is required.

Number of Pages (Copy Request only). Enter the number of pages for this item. This field is required.

Notes. Enter any notes about this item as necessary. This field is not required.

- A new task called “Ship” has been added. Running this task displays a list of all the requests with a status of “Picking”. You can select one or more requests and click the Ship button. Use this task when you do not have the request IDs, or if you prefer to work from the list of requests.

Batch Check-in Task

- The Batch Check-in task has been added. This task lets you check in more than one item at a time without having to individually select a request from the Check-in Materials screen.
- A new Batch Check-in dialog box has been added. It is invoked by running the Batch Check-in task. The Batch Check-in dialog box has these options:

Status List. This displays whether or not the check-in process for this item was successful.

Request ID. Enter the request ID for the item you are checking in.

Item ID. Enter the item ID for the item you are checking in. The item ID corresponds with the item ID your library automation system has assigned to this item.

Enter. Click this button to check in this item.

You can enter either a request ID or an item barcode (if you supplied one during Checkout for this request). RSS can locate the request by either one. This lets you scan the item barcode for several books in succession and perform the check-in process on each.

NOTE

The RSS workstation will prompt for an item barcode if the Local Library unit assigned to the request has defined its 3M protocol and the request does not have an item barcode already in it.

Z39.50 Search Authentication

You now can set up RSS to include your username and password when doing a Z39.50 search of a Local Library Unit, ILL/DD partner, or Z39.50 search target. Most Z39.50 servers do not require authorization, but this feature lets you automatically supply your username and password to those Z39.50 servers that do require authentication.

- A group called Z39.50 Search has been added to the Partner Details dialog box. This group includes two new fields: UserID and Password.
UserID. Enter the username to use when accessing this Z39.50 search target.
Password. Enter the password to use when accessing this Z39.50 search target.
- You will not be prompted for a Z39.50 userid and password if you are searching from the Search Query screen. RSS uses the userid and password for the LLU to which the request is assigned.
- During the Z39.50 discovery process (usually done when defining a Local Library Unit, ILL/DD Partner, or Z39.50 Search Target), you will always be prompted for a Z39.50 UserID and Password. At this point, RSS does not know which Local Library Unit you are performing the search for. If you know the Z39.50 server does not require a userid or password, press Enter and the discovery process will proceed.

RSS 3.0 Web Service

For the 3.0 version of Resource Sharing System, the Web Service has been completely redesigned. It now includes these capabilities:

- The ability to authenticate patrons that make ILL requests from remote locations has been added.
- The ability for patrons to request a cancellation of a ILL request, and request a renewal of an ILL-borrowed item.

To set up the WebPAC long view template so that requests can be submitted to the RSS 3.0 Web Service follow these general steps:

1 Open the WebPAC long view template in a text editor such as NotePad.

2 Locate this line:

```
<FORM ACTION="http://rssserver.mylib.org/  
DLL~ISC22&" METHOD="GET">
```

3 Replace it with this line:

```
<FORM ACTION="http://rssserver.mylib.org/cgi-  
bin/RSSpwsMain.pl?Loan" METHOD="POST">
```

Be sure to replace the `//rssserver.mylib.org` with the IP address to the machine that is running your RSS server.

4 Save the file.