CUFTS
Open Source Serials Management

Administration Guide

Last Updated: September 1, 2010
CUFTS is an open source development project of the Simon Fraser University Library. For more information, see the reSearcher web site: http://researcher.sfu.ca

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1. Introduction

CUFTS is an online serials management system, which includes a knowledgebase of full-text journal collections, a searchable A–Z database of databases (the CUFTS Resource Database or CRDB) and A–Z journal database (the CUFTS Journal Database or CJDB), MARC records for each title, direct to article OpenURL link resolving (GODOT), and electronic resource management (ERM) tools.

![Figure 1: CUFTS Resource Database](image)

**Figure 1**: CUFTS Resource Database
CUFTS is open source software developed at the Simon Fraser University Library. It was designed for use in a consortial environment, but can also be used by individual libraries.

This guide is designed to assist institutions with a hosting and service contract with the Simon Fraser University Library\(^1\), but can also be used by libraries using the software independently.

Any questions about CUFTS should be directed to researcher-support@sfu.ca

\(^1\) http://software.lib.sfu.ca
2. CUFTS Maintenance Tool

2.1 Getting Started

To get started, log into the CUFTS Maintenance Tool (this example is for SFU Library clients).

![CUFTS Maintenance Tool login](image)

**Figure 3**: Logging In

If you have installed CUFTS on your own server, you will need to change the base URL:

http://cufts2.lib.sfu.ca/MaintTool/login

If you do not have a username, or have forgotten your password (and are using CUFTS on the SFU Library server), contact researcher-support@sfu.ca. If you are using CUFTS from another institution, contact the appropriate support person.
2.2 CUFTS Maintenance Tool Interface

Once logged in, you will be taken to the CUFTS Maintenance Tool (the administrative interface).

![CUFTS Interface](image)

**Figure 4:** CUFTS Maintenance Tool Interface

You will see a menu bar providing access to all of the necessary configuration options.  

- **Local Resources** allows you to view all of the collections included in the CUFTS knowledge base and activate the ones your library has access to.

- **ERM** allows you to manage your electronic resources.

- **Site Settings** allows you change a number of configuration options for CUFTS.

- **Statistics** provides brief statistics on your library’s CUFTS usage.

![CUFTS Menu](image)

**Figure 5:** CUFTS Menu
Tools gives you the opportunity to quickly search for a title within all of the CUFT resources and to compare the titles within two to four resources (e.g., what is in Academic Search Premier vs. ABI/Inform Complete).

Change Site allows you to change to another site if you are managing more than one location (e.g., you manage two or more CUFTS libraries).

Account Settings stores details about your CUFTS account.

Logout will log you out of the CUFTS Maintenance Tool.

2.3 Local Resources

This section will walk you through setting up your own local version of the main, global knowledge base. Titles activated here will show up in your link resolver and in your journal A–Z list.

The global knowledge base is maintained by the SFU Library and by associated volunteers. If you’d like to participate in maintaining the global knowledge base, just let us know.

Sites using CUFTS independently of the SFU Library can contact us\(^2\) about receiving free, monthly updates to the global knowledge base, saving them valuable time in keeping this information up to date.

When you select Local Resources for the first time, you will see an empty table. By default, CUFTS displays only your active resources (i.e., databases you have “turned on” for your library). To see the Global Resource list (all available resources stored in the CUFTS global knowledge base) and begin activating them, select the Show All button:

\(^2\) researcher-support@sfu.ca
This will result in the Global Resources being displayed:

![Figure 7: Global Resources]

**2.4 Activating Complete Lists**

CUFTS contains a variety of resource types, including subscription collections where your library receives access to the entire title list (e.g., EBSCO, Proquest), subscription collections where your library will only have access to selected journals from the title list (e.g., Ingenta, ScienceDirect), and free collections, where your library has open access to the entire title list.
To activate a resource that your library has full access to, such as an EBSCO or Proquest resource, select Edit next to the resource name:

```
view | edit | delete
ABI/INFORM Global | Proquest
```

**Figure 8**: Activating a resource

Next, fill in the resulting resource details screens:

```
gen general settings
name ABI/INFORM Global
provider Proquest
type fulltext journals
module Proquest
ERM Net-linked
proxy
dedupe
auto activate
rank 99
active

resource details
database url http://demo.edu.ca/databases/abi.html

cjdb note ABI/Inform Global will be unavailable from December 20, ...

services
/ database
/ fulltext
/ journal
/ table of contents

submit | cancel
```

**Figure 9**: Resource details

In the ERM box, link this resource to the appropriate ERM record (e.g., to the Proquest ABI/Inform record). If you have not yet created your ERM records, you can link this later.

Check the **Proxy** box if you’re using EZproxy or Innovative’s WAM system to authenticate your users for this resource (see Site Settings for details).
If the resource is an open access collection (e.g., DOAJ), do **NOT** check the proxy box. As these resources are freely available, it is not necessary to authenticate users.

Check **De-dupe** if you are activating other resources from the same provider. For example, if you activate two Proquest resources that contain the same title, CUFTS will select only the highest ranking resource (see Rank below) when link resolving. CUFTS will not de-duplicate for the same title from different providers (e.g., between EBSCO and Proquest).

Check **Auto-Activate**. Because you have access to the entire title list for this resource, CUFTS will automatically activate all of the journals for you, and replace the older version of the title list with the latest one, as part of the regular updating process at the SFU Library.

For collections where your library only has access to selected titles (e.g., Ingenta, ScienceDirect) it is **critical** that you do **NOT** select Auto-activate. See the following section on Activating Partial Collections for further information.

For **Rank**, select a number between 1 and 100. Higher ranked resources (e.g. 99) will display before lower ranked ones (e.g., 10) on the link resolver interface (when there are multiple results) and on the CUFTS Journal Database (CJDB) display (again, when there are multiple results).

Check **Active** to turn this resource on in your CUFTS Local Resources.

Under **Resource Details**, the **Database URL** field can be left blank, or, if you have a local web page that describes the resource, you could enter that URL. For example, the SFU Library has a page that describes each resource in detail:
Figure 10: Simon Fraser University Library’s database page for Academic Search Premier

This URL will be used when CUFTS is unable to link to the article, issue, or journal level, providing a minimum level of access for users.

When the Database URL field is left blank, CUFTS will by default link to the search page of the resource:
CJDB Note allows you to enter a statement that will appear next to EVERY title from this resource on your CUFTS Journal Database (e.g., to announce scheduled downtime). To add a note only to an INDIVIDUAL title, see the following section on Activating Partial Lists.

Occasionally a resource may have additional fields under Resource Details. For example, all EBSCO resources require an Authorization Name:

Fill in your authorization or account number from the publisher for this field.

Under Supported Services, you will see one or more levels of linking that are available for the resource. It is recommended that you select all of them. If a technical problem temporarily blocks article-level linking,
issue, journal, or database-level linking will then be available as an alternative.

Click **Submit** and the resource is now activated.

**NOTE**: If you are also using the CJDB, you will need to do a database re-build (see Rebuilding CJDB) to include this newly activated resource.

### 2.5 Activating Partial Lists

To activate a subscription resource that your library has only selected access to, such as Ingenta or ScienceDirect, follow all of the previous steps, except for **Auto-activate**. You must **NOT** check Auto-activate for these resources:

![Figure 13: Leaving Auto-activate unchecked for collections with selected titles](image)
Doing so would eliminate all of the individual title selecting that is a necessary part of activating this kind of a resource.

Note that I have not checked Dedupe either, as my library has no other Ingenta collections in CUFTS to deduplicate against. Checking Dedupe would not cause any problems, but it won’t do anything useful either.

Once you have completed the General Information screen, click on the Submit button to return to your list of Local Resources.

Select the Show Active button to limit the list to the resources you have activated:

```
<table>
<thead>
<tr>
<th>resource</th>
<th>provider</th>
<th>type</th>
<th>titles</th>
<th>active</th>
<th>rank</th>
<th>title list scanned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABI/Inform Global</td>
<td>Proquest</td>
<td>fulltext journals</td>
<td>2668 of 2668 (bulk)</td>
<td>yes</td>
<td>90</td>
<td>2005-07-04</td>
</tr>
<tr>
<td>Ingenta Connect</td>
<td>Ingenta</td>
<td>fulltext journals</td>
<td>0 of 7380 (bulk)</td>
<td>yes</td>
<td>95</td>
<td>2005-05-30</td>
</tr>
</tbody>
</table>
```

**Figure 14:** Active Local Resources

In the titles column, you can see that with the ABI/Inform example **2668 of 2668** titles have been activated. This is because you chose Auto-activate, due to your library’s access to the complete collection.

However, notice the Ingenta Connect example. Here **0 of 7380** titles have been activated. This is because you did not select Auto-activate, as you must select the individual titles to which your library subscribes.

To activate these individual titles, click on **7380** in the titles column. This will take you to the title list for the resource:
Almost all CUFTS title lists come from the providers themselves, and are simply uploaded directly into CUFTS – including any errors that the providers may have overlooked! If you see an error in a CUFTS title list, please let us know, and we will contact the provider to ask for a correction.

Select the checkbox next to each title your library subscribes to. Once you have filled a page, click the Apply button on the top of the page. After applying those selections, you can move to the next page of titles, using the linked page numbers. Remember to always hit the Apply button before moving to the next page.

Occasionally, you may have more limited access to the title than is indicated on the CUFTS list. For example, the Figure above shows that the ACC Current Journal Review is available back to 1994, but your library may only subscribe back to 2001. To change this date, use the Edit Page.
button on the top of the screen. This will give you a more detailed title list page:

![Figure 16: Editing a CUFTS title list](image)

In the `ft_start_date` column, you can enter your own full text starting date. Be sure to match the date format used in CUFTS (i.e., 2001-01-01).

Other fields include the `ft_end_date`, `publisher`, `journal_url`, `vol_ft_start`, `vol_ft_end`, `iss_ft_start`, `iss_ft_end`, `embargo_months`, `embargo_days`, `current_months`, `cit_start_date`, `cit_end_date`, `vol_cit_start`, `iss_cit_start`, `vol_cit_end`, `iss_cit_end`, and `cjdb_note`.

The `cjdb_note` field allows you to display some text next to that individual title in your CJDB.

Click the **Apply** button to save your changes.

Alternatively, you can click on the linked ID number for the journal, which will bring up a page of editable fields:
As in the previous method, change your data and then use the Apply button to save your changes.

Another method of activating selected titles in CUFTS is to import a list of ISSNs. To do this you will need to create your own list of ISSNs that you have access to through this collection.

The format of the list is important. It must be a plain text file, have the heading ‘issn’ and be followed directly by one ISSN per line, with no blank spaces. CUFTS will not accept ISSN lists that are not formatted exactly as shown.

Lists of titles can also be used, but there is a much greater probability of error, due to differences in title case, exact wording, etc. ISSNs are the best method to use.

From your list of active Local Resources, select Bulk in the titles column:
Next, from the Title List Overlay section, select **Activate** matching on **ISSN**.

You can choose whether or not to **Deactivate Other Titles**. As this is a new list, it doesn’t make any difference. However, if there was list already there, and you simply wanted to add a few titles to it, choose **No**, to preserve the existing entries.

Browse for your title list, and hit the **Upload** button.

CUFTS provides a report on the upload:
Returning to the list of Local Resources, we can see that 3 of the 7380 titles are now activated:

![Image of uploaded results]

**Figure 21**: Upload Results

**NOTE**: If you are also using the CUFTS Journal Database (CJDB), you will need to do a database re-build (see Rebuilding CJDB) to include this newly activated resource.

If you need to activate a list of titles, AND change some information about each one, such as the full text start date, follow the procedures above, but choose Overlay instead of Activate.

Your tab delimited list should include the information you wish to change, such as:

```
issn  ft_start_date
00124587  2000-01-01
```
Note again the lack of space or hyphen in the ISSN. Also, even if the full text start date is just a year, you must add the month and day information as shown (YYYY-MM-DD).

2.6 Activating Unique Local Collections

CUFTS allows you to create your own Local Resources when one is not available from the Global Resources list. Ideally, we’d like to hear from you if a resource is missing, so we could add it for everyone. However, it is possible to add one yourself.

From the CUFTS Local Resource page, select New Local Resource:

![New Local Resource](Image)

**Figure 23**: New Local Resource

From the New Resource screen, fill in all of the fields:
You must provide a **Name** for the new resource and the **Provider** (often a publisher or an association). For **Type**, you can select from a number of choices, but in most cases you will want Fulltext Journals.

The **Module** is an important component of any new resource. For typical fulltext collections, you will enter ‘GenericJournal’. If your new resource uses Digital Object Identifiers (DOIs), use ‘GenericJournalDOI’. For other modules, please contact us for further information.

Check **Proxy** if it is a subscription resource, and **Dedupe** if there are duplicates within your CUFTS resources (likely not). Provide a **Rank** of your choice and select **Active**.

The Supported Services will depend on the amount of detail provided in the title list. If DOIs are used, or if the resource is OpenURL compliant, you can check **Fulltext** for article-level linking. In most cases you should
also select **Database** and **Journal**, as this level of linking is usually possible.

Press **Submit** to save your changes. The new resource should now be included on your list of Local Resources:

![Resource List](image)

**Figure 25**: A New Local Resource

The final step is to add a title list for your new resource. The title list should, at minimum, include the journal titles, ISSNs, fulltext start date, and a URL:

![Title List](image)

**Figure 26**: Making your own title list

The field headers must be in the same format in the figure above. The dates must be in the same format as well, although a simple year is acceptable, without month or day (i.e., 1996). Each piece of information should be separated by a TAB. If any information is missing, a blank TAB should be entered in its place (for example, Science Now does not have an ISSN, so I hit TAB twice before entering the date). CUFTS will not accept title lists that have not been formatted **exactly as shown**.
You can now use the **Bulk** importing feature as in the previous example to upload this title list to the new resource.

**NOTE:** If you are also using the CUFTS Journal Database (CJDB), you will need to do a database re-build (see Rebuilding CJDB) to include this newly activated resource.

### 2.7 Exporting Title Lists

In addition to uploading title list data into CUFTS, it is also possible to export it.

To export a title list from CUFTS, select the **Bulk** link from your chosen Local Resource. From the **Title List Export** section of the resource screen, chose your **Export Format** (currently only tab delimited is supported) and **Records** (all titles or only your activated titles). Click on **Export**:

![Figure 27: Title List Exports](image)

Large lists may take a few seconds to process. The list will appear within your browser window for you to save into a separate text file:
Figure 28: ABI/Inform title list export

Use your browser’s Back button to return to CUFTS.

2.8 Activating CrossRef

CUFTS works with CrossRef to provide Digital Object Identifier (DOI) linking for some DOI–enabled resources (including Emerald, Ingenta, ScienceDirect, and others). Activating CrossRef in CUFTS will provide more article–level linking for your users.

To enable CrossRef in your CUFTS account, go to Local Resources. Select Show All to see the Global Resource list. Find CrossRef on the list and select Edit:
From the CrossRef details screen, it is important to make CrossRef this highest ranked of all your CUFTS resources. In the above example, I’ve chosen 999, ensuring that in my 1–100 ranking scale, it will always be on top. Check Active.

Next, you’ll need to add your CrossRef Authorization Name and Password. Libraries can receive a free account from CrossRef. Visit their web site to apply. Near the bottom of the screen, check Metadata. Press the Submit button and CrossRef is now activated.
3. Electronic Resource Management

To access the Electronic Resource Management (ERM) features of CUFTS, select the ERM option in the left menu.

From there, you will see Main, License, Provider, COUNTER, SUSHI, Tables, and Alerts. We'll review these in the logical order of setting them up, starting with Tables.

3.1 Tables

Tables allow you to create data that will be used in some of your dropdown menus in some ERM fields.

After selecting Tables from the menu, fill in the appropriate data, such as all of the consortia your library belongs to, the various content types and resource types you would like to choose from, the subject names for your databases, and more. To add a new item, simply type it in the “new” field (e.g., Encyclopaedias in the Content Type field or Citation Index in the Resource Type field) and hit the Submit button.
3.2 License

To reduce the duplication of information, CUFTS allows you to create license records for vendors, such as EBSCO, for which you may have more than one resource (e.g., Academic Search Premier, Business Search Complete, etc.). This will save you from needing to add the same contact information or licensing terms for each EBSCO resource in CUFTS. Instead you will be able to link each EBSCO resource to the single EBSCO license record.

To create or access the license records, go to the left menu, under ERM, and choose Licenses. On the resulting page, you can either select an existing license record to edit, or create a new one.
On the resulting page, type in the name of the new resource:

![New ERM License Record](image)

**Figure 33: New License Record**

Remember, these should be license records only, so only create one for EBSCO, not separate ones for each EBSCO resource!

Once a license record has been created, it can be edited to fill in the various fields. The editing screen provides fields for the Terms of the license, Contacts, and Files (to upload copies of your license) – information that will be common between all the databases (e.g., all EBSCO databases).

Remember, you do NOT need to fill in all of the ERM fields. Some libraries will want to complete all of them, but many will only use selected fields to meet their ERM needs.
3.2.1 Terms

**Resource Identifier**: A unique, internal identifier for this license.

**Full On-Campus Access**: Indicate Y or N to whether or not this resource is available for all of your branches.

**Full On-Campus Access Notes**: Add any notes necessary to explain your above choice.

**Allows Remote Access**: Indicate whether the resource license allows users to access it from off-site.

**Allows Proxy Access**: Indicate whether the resource license allows users to access it via a proxy server (e.g., WAM or EZProxy).

**Allows Commercial Access**: Indicate whether the resource license allows the content to be used commercially.
**Allows Walk–Ins**: Indicate whether the resource license allows non-affiliated users who are not part of the organization to have access.

**Allows ILLs**: Indicate whether the resource license allows for interlibrary loan lending.

**ILL Notes**: Provide any necessary information regarding the previous setting.

**Allows E–Reserves**: Indicate whether the resource license allows for the use of the content in e–reserves.

**E–Reserve Notes**: Provide any necessary information regarding the previous setting.

**Allows Coursepacks**: Indicate whether the resource license allows for the use of the content in coursepacks.

**Coursepack Notes**: Provide any necessary information regarding the previous setting.

**Allows Distance Ed**: Indicate whether the resource license allows for the use of the content for distance education purposes.

**Allows Downloads**: Indicate whether the resource license allows users to download materials from the resource.

**Allows Prints**: Indicate whether the resource license allows users to print materials from the resource.
**Allows Emails:** Indicate whether the resource license allows users to email materials to themselves or others.

**Allows Emails Notes:** Provide any necessary information regarding the previous setting.

**Allows Archiving:** Indicate whether the resource license allows for the local archiving of the content.

**Archiving Notes:** Provide any necessary information regarding the previous setting.

**Own Data:** Indicate if the content is purchased or is only licensed.

**Citation Requirements:** Indicate if any specific citation requirements are necessary.

**Requires Print:** Indicate whether the resource license requires the library to carry a subscription to the print version of the resource.

**Requires Print Plus:** Indicate whether the resource license requires the library to carry a subscription to the print version of the resource plus an additional fee.

**Additional Requirement:** Indicate any other requirements or restrictions.

**Allowable Downtime:** Indicate how much downtime is permitted in the license.

**Online Terms:** Add a URL to the license Terms of Use, if they are available online.
User Restrictions: Add any additional user restrictions that are not covered elsewhere.

Termination Requirements: Indicate any requirements for terminating the license.

Terms Notes: Add any additional notes about the terms of the license.

Perpetual Access: Indicate whether the license provides perpetual access.

Perpetual Access Notes: Provide any necessary information regarding the previous setting.

3.2.2 Contacts

This section allows you to add information about the contact representative for the resource.

![Contact Fields](image)

**Figure 35**: Contact Fields
3.2.3 Files

This section allows you to upload files about the resource. For example, you could upload a PDF copy of the license.

![File uploads](image)

**Figure 36**: File uploads

3.3 Provider

The Provider section allows you to enter information that will be shared across all resources from that provider (e.g., you can enter one username that will be automatically entered for all EBSCO databases).

To create a new Provider record, go to the ERM menu, select Provider, and use the dropdown menu to select Create new provider record:
This will open a new provider record, with a General tab and a Statistics tab:

### 3.3.1 General

The General tab is for basic information about the resource, such as name, administrative username, administrative password, etc. This information will be carried over to the main ERM record for all EBSCO resources (using the Links feature described below). This saves you from needing to re-enter the same information for common resources.
**Provider Identifier**: Add a unique name for the provider.

**Provider Name**: Add a public name for the provider (can be the same as above).

**Local Provider Name**: Add an internal name for the provider (can be the same as above).

**Admin Username**: Add your username to administer the provider interface.

**Admin Password**: Add your password to administer the provider interface.

**Admin URL**: Add the URL for the provider administrative interface.

**Support URL**: Add the URL to the provider support page.

**Support Email**: Add the support email for the provider.

**Support Phone**: Add the support phone number for the provider.

**Knowledgebase**: Add the URL for the knowledgebase of the provider (if they have one).

**Customer Number**: Add your customer number for the provider.

**Contact Info**: Add any additional contact information, such as the mailing address.

**Notes**: Add any additional information about contacting the provider.
3.3.2 Statistics

The Statistics tab is for information about the statistics available from the provider. For information about statistics available from CUFTS, please see Section 3.7.2.

This information will be carried over to the main ERM record for all EBSCO resources. This saves you from needing to re-enter the same information for common resources.

![Figure 39: Statistics Tab](image)

**Stats Available?**: Indicate whether statistics are available from the provider.

**Stats URL**: Add the URL to the statistics from the provider.

**Stats Frequency**: Indicate how often statistics are available from the provider.

**Stats Delivery**: Indicate how the statistics are made available from the provider.
**COUNTER Stats**: Indicate whether COUNTER-compliant statistics are available from the provider.

**Stats Username**: Enter the username required to access statistics from the provider.

**Stats Password**: Enter the password required to access statistics from the provider.

### 3.4 Main

The next step will be to create new ERM Resources for your databases. To do so, select ERM and then Main:

![Main Menu Option](image)

*Figure 40: Main Menu Option*

On the resulting page, you can search for resources using several options.

To create a new record, select Create ERM Record:
Then fill in the Record Identifier (a unique name for the resource) and the Resource Name (the public name for the resource) – these may be the same:

Once the record has been created, you can begin to fill in the various ERM fields from each tab (General, Dates/Costs, Statistics, Admin, Subjects, Links, MARC).

3.4.1 General

The General tab provides basic information about the resource. Notice that information from the Provider tabs will be carried over (e.g., Provider Name, etc.), but can be overwritten if necessary:
Notice the dropdown choices, such as Resource Type (e.g., Citation Database, Fulltext Database, Partial Fulltext Database, etc.), Content Type (e.g., Journal Articles, Audio Files, Images, etc.), and more that are available based upon the information created in the Tables section. If you ever need to add data to these dropdowns, simply return to the Tables section.

Proceed by filling in as much data as you require for each tab. Be sure to hit the Submit button before moving on to the next tab.

**Resource Identifier:** A unique identifier for the resource.

**Main Name:** A public name for the resource, which will appear on the public interface.

**Internal Name:** An name for internal use only.

**Vendor:** The name of the vendor providing the resource.
**Publisher:** The name of the publisher of the resource.

**Provider Name:** The name of the provider of the resource. If you created a Provider record in the previous section, you can link it here. You can override any linking by filling in the blank field.

**URL:** The public URL for the resource. You do not need to add the proxy prefix, as CUFTS will do this for you automatically.

**Access:** Add a note about how to access this resource, if necessary (e.g., Standalone CDROM).

**Resource Type:** Choose from a dropdown list that you created in the Tables section (e.g., fulltext database, ebook collection, partial fulltext database, etc.).

**Resource Medium:** Choose from a dropdown list that you created in the Tables section (e.g., Online, CDROM, etc.).

**Content Types:** Choose from a selection list that you created in the Tables section (e.g., Statistics, Book Reviews, Journal Articles, etc.). You can select multiple content types by holding down the Control key while you click with your mouse.

**File Type:** You can use this field to describe the kinds of files provided by the resource (e.g., mp3s, PDFs, HTML, etc.).

**Group Records:** This is a special field that allows you to create a special "container" record for a resource, which can then link to other records. For example, you may wish to show your users a single record for Medline, but then have that record provide links to other Medline records.
Here is an example. When users search for Medline in the CUFTS Resource Database (CRDB), they will only see a single entry, despite the fact that the library has four different Medline resources (note the lack of a direct "Connect" link):

![Figure 44: Single Medline Entry](image)

On selecting the resource, users will be taken to a page with all of the Medline choices:
Selecting any one of these will then take them to the record for that particular version of Medline (e.g., PubMed):
To create this, simply add the resource identification numbers to the Group Records field, separated by spaces. For example:

4569 5896 1254 5645

You can find these identifiers in either the CUFTS Maintenance Tool URL or the public URL for each resource. Here is the URL for PubMed for SFU:

**CUFTS Maintenance Tool URL**
http://cufts2.lib.sfu.ca/MaintTool/erm/main/edit/5645

**CRDB URL**
http://cufts2.lib.sfu.ca/CRDB/BVAS/resource/5645

**Public List?**: Choose whether or not to display selected fields (see CRDB Settings) of this resource in your CRDB. In most cases, this should be set to YES.

**Public?**: Choose whether or not to publicly display this entire ERM record. In most cases, this is set to NO.

**Brief Description**: This is a short description of the resource that will appear on the initial result list in the CRDB (see Figure 44 above).

**Proxy?**: Indicate whether or not this resource should be proxied for off-site users. For subscription resources, select YES, for open access resources, select NO.

**Full Description**: This is a more detailed description of the resource that will appear on the full record. See Figure 46 above.
**Public Message**: Text entered here will display to users. For example, it can be used for additional access instructions, such as the need for a browser plugin.

**Alerts**: Text entered here will display to users. For example, it can be used for a temporary message announced scheduled downtime for the resource.

**Alert Expiry**: Enter a date for when the Alert message above will automatically stop displaying. It must be formatted as YYYY–MM–DD. For example, you could add the date for when the scheduled downtime ends.

**ISSN**: You may enter an ISSN for the resource.


**User Documentation**: You may add links to any documentation that your library has created for this resource (e.g., guides, online videos, etc.). HTML is permitted in this field.

**Simultaneous Users**: Enter the number of users that may access the resource at any one time (e.g., Unlimited).

**Update Frequency**: Indicate how often the resource is updated by the provider (e.g., Daily).

**Coverage**: Enter the coverage period for the content in the resource (e.g., 1984–01–01 to current).

**Embargo Period**: Enter any embargo period for the resource (e.g., 12 Months).
Subscription Type: This can be used to indicate the type of subscription for the resource. For example, for e–journal collections it could be Direct Subscription or Part of Package Subscription.

Subscription Status: Select from the list (e.g., Active, Trial, On Order, etc.).

Print Included?: Indicate Yes or No.

Subscription Notes: Add any necessary notes to describe the subscription.

Subscription Ownership: This is used for e–journals and describes whether or not the resource is owned by your library. There are three possible options: Subscription, Part of Core Package, Formerly Part of Core Package.

Subscription Ownership Notes: Enter any further details about the subscription ownership.

Cancellation Cap?: Indicate whether or not this resource has a cancellation cap.

Cancellation Cap Notes: Enter any details about the cancellation cap.

Active Alert: Enter the email address(es) of anyone that should receive automatic notification of when this resource record is activated. You can add multiple email addresses by separating them with commas.

Pick and Choose: Does this resource allow you to pick and choose what to purchase from their full collection, or is it all or nothing?
MARC Available: Indicate whether MARC records are available from the resource provider.

MARC Download Notification: Enter the email address(es) of anyone that should receive automatic notification of the last MARC record download for the resource.

Requirements: Enter a brief description of any hardware or software requirements to use the resource.

Maintenance: Enter a brief description of any normal maintenance window (e.g., This resource will be unavailable on Saturdays between 2am and 4am Pacific Time).

Title List URL: Add the URL for a title list from the resource provider.

Help URL: Add the URL for the provider's help/support page.

Status URL: Add the URL for the current server status for this resource.

Resolver Enabled: Indicate whether or not the resource works with link resolvers.

RefWorks Compatible: Indicate whether or not the resource works with RefWorks.

RefWorks Info URL: Add the URL for any help pages specifically on using the resource with RefWorks.

Print Equivalents: Indicate any details about print equivalents for this resource.
3.4.2 Dates/Costs

Use this tab to enter data about the costs and dates associated with the resource.

![Dates/Costs Tab](image)

**Figure 47**: Dates/Costs

**Cost**: Enter the current cost of the resource.

**Advanced Costs**: Use the Advanced Costs link to create an ongoing record of past payments for the resource:

![Advanced Costs Table](image)

**Figure 48**: Advanced Costs
**Invoice Amount:** Enter the amount invoiced for the resource.

**Currency:** Select the currency charged for the resource.

**Pricing Model:** Select a pricing model for the resource based on information you added to the Tables (e.g., One Time Purchase, Usage-Based Pricing, Open Access, Subscription, etc.).

**Pricing Model Notes:** Enter any additional information about the resource pricing model.

**Price Cap:** Indicate whether there is a price cap for this resource.

**GST:** Indicate whether the Goods and Services Tax is charged for this resource.

**GST Amount:** Enter the amount of GST paid for this resource.

**PST:** Indicate whether Provincial Sales Tax is charged for this resource.

**PST Amount:** Enter the amount of PST paid for this resource.

**Payment Status:** Select from the choices (Paid, Renewed, Cancelled, Delayed).

**Order Dates:** Enter the date that the resource order was placed, formatted as YYYY-MM-DD.

**Contract Start:** Enter the date for the start of the contract, formatted as YYYY-MM-DD.
**Contract End**: Enter the date for the end of the contract, formatted as YYYY-MM-DD.

**Original Term**: Enter the original term for the contract.

**License Start Date**: Add the start date for the license, formatted as YYYY-MM-DD.

**Local BIB Number**: Enter the BIB Number from your ILS for this resource.

**Local Customer Number**: Enter your customer number for this resource.

**Local Vendor Number**: Enter your local vendor number for this resource.

**Local Acquisitions Number**: Enter your local acquisitions number for this resource.

**Local Fund Number**: Enter your local fund number for this resource.

**Journal Auth Number**: This field may be used for more advanced linking in the future.

**Auto Renewal**: Indicate whether you would like the resource to be automatically renewed when the contract period ends (see Contract End above).

**Renewal Notification**: Indicate the number of days before the contract end date that you would like to have an email note go out.

**Notification Email**: Enter the email address(es) of those that should receive the renewal notification above.
Notice to Cancel: Indicate whether the resource requires notification before cancelling.

Requires Review: Indicate whether this resource requires review by an individual (e.g., collections manager) or group (e.g., collections committee) before cancellation or renewal.

Reviewed By: Enter the name of any individuals or groups that must be consulted before cancelling or renewing the resource.

Review Notes: Enter any details about the review process.

Consortia: Select the consortia that the resource was purchased through, based on information added to Tables.

Consortia Notes: Enter any details about the consortial arrangements for the resource.

Dates/Costs Notes: Enter any additional details about the dates or costs information.

Miscellaneous Notes: Enter any additional information.

3.4.3 Statistics
The Statistics tab allows you to enter information about the statistics available from the provider. Notice again that statistics information entered in the Provider section is carried over, but can be overwritten for this individual resource:
3.4.4 Admin

The admin tab allows you to enter information about administering the resource, such as your administrative username and password. Again, some information from Provider is carried over, but can be overwritten.
Open Access: Indicate whether the resource is open access.

Subscription Number: Enter the subscription number provided by the vendor.

Admin Username: This should be carried over from the provider record that you already filled out, but you can override it here.

Admin Password: This should be carried over from the provider record that you already filled out, but you can override it here.

Admin URL: This should be carried over from the provider record that you already filled out, but you can override it here.

Support URL: This should be carried over from the provider record that you already filled out, but you can override it here.

Access URL: Enter the public URL for this resource.
Account Needed: Indicate whether the users need a separate account to access the resource.

Public Username: If the vendor requires a public username, enter it here.

Public Password: If the vendor requires a public password, enter it here.

Training Username: If the vendor provides a username for training resources, enter it here.

Training Password: If the vendor provides a password for training resources, enter it here.

MARC URL: Enter the URL where the vendor provides MARC records for the resource.

IP Authentication: Indicate whether the resource utilizes IP authentication.

Referrer Authentication: Indicate whether the resource utilizes referrer authentication.

Referrer URL: Enter the referrer URL for the resource.

OpenURL Compliant: Indicate whether the resource is OpenURL compliant.

Breaches: Record any access or security breaches which may have occurred for this resource.

Access Notes: Add any additional access notes here.
Admin Notes: Add any additional administration notes here.

Local Provider Name: This should be carried over from the provider record that you already filled out, but you can override it here.

Support Email: This should be carried over from the provider record that you already filled out, but you can override it here.

Support Phone: This should be carried over from the provider record that you already filled out, but you can override it here.

Knowledgebase: This should be carried over from the provider record that you already filled out, but you can override it here.

Customer Number: This should be carried over from the provider record that you already filled out, but you can override it here.

Provider Contact: This should be carried over from the provider record that you already filled out, but you can override it here.

Provider Notes: This should be carried over from the provider record that you already filled out, but you can override it here.

3.4.5 Subjects

The Subject tab allows you to associate subjects with the resource. These subjects are pulled from the ones set up in the Tables section. You can add as many subjects as you wish to each resource, and rank them:
Subjects with higher numbers will appear before subjects with lower numbers in the CRDB (in the Top Resources section – see the CRDB section for a screenshot). If subjects are left as 0, they will appear alphabetically in the Other Resources section.

**Note**: the best method for organizing the resources on the subject page is via the [rank] drag and drop function outlined in the CRDB section below.

### 3.4.6 Links

Links allows you to connect the resource to the previously created License record and Provider record:
Resource and Journal Linking

The Resource and Journal Linking section allows you to make selected ERM fields visible for individual journals in the CJDB. For more information on this section, contact us.

Once you have enabled COUNTER and/or SUSHI data (see below), you can use this section to combine that data with the ERM data entered into CUFTS.

To do so, first select the Resource and Journal Linking link.

On the resulting page, select the COUNTER tab:

![COUNTER Tab](image)
On this page you will first see a list of any currently linked COUNTER sources. If it is not already linked, you can choose from the sources listed on the bottom portion of the screen.

![Figure 54: Linking COUNTER Sources](image)

Once this linking is complete, you will be able to run more complex statistical reports (see Section 3.7.2).
3.4.7 Files

This section allows you to upload any files associated with the resource, such as PDFs, Word documents, or spreadsheets.

![Files](image)

**Figure 55**: Files

3.4.8 MARC

The MARC tab provides access to a MARC record for the resource:

![MARC](image)

**Figure 56**: MARC
3.5 SUSHI

CUFTS allows you add the SUSHI information provided by the resource. To do so, you will need to create a new SUSHI record in CUFTS. First, select SUSHI from the ERM menu in CUFTS.

On the resulting screen, select Create New SUSHI Record:

**Figure 57:** SUSHI

![Create New SUSHI Record](image)

**Figure 58:** Create New SUSHI Record

From there, fill in the required data:
**Figure 59:** SUSHI Record Details

**Name:** Enter the name of the resource.

**Requestor:** Add the name supplied by the vendor for your institution. Contact them if they haven't provided you with a SUSHI ID.

**Service URL:** Enter the vendor's SUSHI URL.

Now that you've filled in the SUSHI information, you will need to go to the COUNTER section and create a corresponding record for the resource.

This process is outlined in the next section of this guide. Once that is done, CUFTS will automatically pull in all of the SUSHI data from the vendor.
3.6 COUNTER

CUFTS allows you to upload the COUNTER statistics provided by the vendors for your resources or see the SUSHI data harvested from the vendor (see previous section for setup).

As of the date of publishing this guide, CUFTS provides COUNTER support for DB1 and JR1 reports to revision 3.

First, you will need to create a new COUNTER record in CUFTS. To do so, select COUNTER from the ERM menu in CUFTS.

On the resulting screen, select Create New COUNTER Source Record.
Next, fill in the resulting form:

![New COUNTER Source Form](image)

**Figure 62:** New COUNTER Source
**Name:** Add a name for the new COUNTER record.

**Type:** Select whether it is for journal statistics or database statistics.

**View COUNTER Stats Summary:** Once you have uploaded your COUNTER statistics, you will be able to use this link to see a summary of those statistics (see below).

**SUSHI Resource:** If you have created a SUSHI record for this resource, it will appear in a dropdown box here (see the previous SUSHI section for details). If you are not using SUSHI for this resource, ignore this field.

**Reference:** Add your SUSHI customer reference number, provided by the vendor. If you are not using SUSHI for this resource, ignore this field.

**Next Run Date:** Add the date for the next SUSHI run, formatted as YYYY-MM-DD.

This is the date that the system will try to retrieve a SUSHI report. If it succeeds, this date will be updated by incrementing the months using the "increment months" field (see below). If the download fails, it will remain unchanged and the system will try again the next day.

If you are not using SUSHI for this resource, ignore this field.

**Start Date:** Add the start date for the SUSHI run (e.g., 2008–01–01). This is the start date for the report.

The system will retrieve a report starting at the first of the month of this date. The end date for the report will be this date plus "increment month" months.
If you are not using SUSHI for this resource, ignore this field.

**Interval Months**: Set the number of months before COUNTER data is available from this source (see above). If you are not using SUSHI for this resource, ignore this field.

**File Upload**: Upload the COUNTER file provided by the vendor. You can upload multiple years of data here. It must be in tab-delimited format and conform with the standard data structure for COUNTER. If you have any problems, send us a copy of the file to review.

**COUNTER Stats Summary**

Now that you have uploaded a few COUNTER files or defined some SUSHI targets, you can see a summary of the results using the *View COUNTER Stats Summary* link:

![COUNTER record summary table](image)

**View Report**

```
Start: (YYYY-MM-DD)
End: (YYYY-MM-DD)
```

*Figure 63: COUNTER Summary*
View Report: You can use this feature to limit the statistics to a particular date range:

Figure 64: View Report

It will then generate a table of the data:

Figure 65: COUNTER Report

3.7 Selecting Records

3.7.1 MARC Records

To select records for obtaining MARC records or statistics, go to ERM and then Main. Under Search Results, select a resource and then hit the Add to Selected button. You can do this with multiple records:
Figure 66: Selecting Records

Next, scroll down to the Currently Selected Records section:

Figure 67: Currently Selected Records

To view the MARC records for these databases, select MARC Records:
3.7.2 Statistics

To view statistics for these resources, select the Statistics button. On the resulting screen, select the statistic type, statistics start and end dates, granularity, and format:
Hitting the Run Report button will generate your report:

To enable many of the available statistic choices, you will need to first supply all available COUNTER and/or SUSHI data (see previous sections) and then use the Resource and Journal Linking feature to combine this data with the ERM data.
3.8 Alerts

To create an alert, select a record as above.

**Figure 71: Selecting Records**

Use the Add Alerts button to generate a new alert:

**Figure 72: Add Alerts**

This message will be displayed on the CRDB until the expiry date:
4. CUFTS Statistics

The CUFTS Statistics page is available from the Statistics link on the main Administration page. CUFTS currently provides a limited number of statistics, including:

- The 50 Most Requested Journals Without Fulltext
- The 50 Most Requested Journals With Fulltext
- The Number of Requests

Each of these can be measured for the past week, month, or year.
Select the **Report Type** and the **Time Period**, and press the **Run Report** button to retrieve the CUFTS statistics:

### Figure 75: CUFTS Statistical Report

CUFTS developers are particularly interested in additional kinds of statistics that would be of interest. Please send us any requests or suggestions for what you’d like to see.

For others statistics available from the CUFTS ERM module, please see Section 3.7.2.

## 5. CUFTS Site Settings

The CUFTS Site Settings page is available from the **Site Settings** link on the main Administration page. The Site Settings page allows you to configure your CUFTS account.

### 5.1 General

The **General** tab describes basic information about your library, including its **Name**, the **Email** address of your local CUFTS administrator, and the
Proxy Prefix (for EZproxy), Alternate, or WAM (Innovative’s Authentication system) server information.

You can also decide whether or not to show the different ERM fields described in the previous section.

Site domains and IP networks can be added to CUFTS from this section, using the Edit button for each.

![General Settings](image)

Figure 76: General Settings

### 5.2 CJDB Templates

The CJDB Templates tab allows you to customize your CJDB interface, including adding your own header, changing the colours or wording, etc.:
To add a unique header to your CJDB, use the `page_header` template. Click on the Edit icon in the Sandbox column in the `page_header` row.

From here, you can type or paste in the HTML for your new header:

```
<edit template>

<dv id="page-header-background" style="background: url(#{ image_dir }\[/cjudb_header_repeat.gif"">\<img alt="CJDB Logo" id="page-header-image" src="#{ image_dir }\[/cjudb_header.gif" border="0"/></dv>
```

Click **Submit** when you’ve finished. Click the **Sandbox** link to view your changes:
When you are satisfied with your changes, use the **Transfer** arrow to move the new information to **Active**:

![Figure 80: Transferring templates](image)

Your changes are now visible to the public. You can use the **Active** link above to quickly view your live CJDB.

The Cascading Style Sheet for your CJDB can be edited in the same way as your templates. Select the **Edit** icon from the **Sandbox** column:

![Figure 81: Cascading Style Sheet](image)

Make any changes to the style sheet and click **Submit** to save:

![Figure 82: Editing your CJDB style sheet](image)
As with the templates, you can view your changes by clicking the Sandbox link. When you are satisfied, use the black Transfer arrow to move the changes from the Sandbox to Active, making the changes visible to everyone.

5.3 CRDB Templates

The CRDB Templates function in exactly the same way as the CJDB Templates, but instead modify the interface of your CUFTS Resource Database (CRDB).

5.4 CJDB Settings

The CJDB Settings tab allows you to switch between the default Unified display and the alternative Standard display:

![CJDB display options](image)

**Figure 83:** CJDB display options

The Unified display presents brief records from a search, and Standard returns only titles, which link to the full display. You are free to choose your preferred option.

You can configure whether or not to display citation information in your CJDB results, using the Yes/No dropdown option.
Display Resource Name Only: Set to NO, and your CJDB will show both the resource name and provider (e.g., Academic Search Elite – EBSCO):

![Resource Name and Provider](image)

Figure 84: Resource Name and Provider

Change it to YES, and you will only see the resource name (e.g., Academic Search Elite).

If you are including print titles in your CJDB, fill in the **Print Name** of your library, which controls what users will see on the CJDB for your print journals:

![Print Name](image)

Figure 85: Print name

If you are including print titles, you will also need to fill in the **Print Label**, which controls the wording of the link to your catalogue in the CJDB:

![Print Label](image)

Figure 86: Print Label

The CJDB also allows you to use LDAP or other internal authentication systems to limit access to your own users (students, faculty, staff, etc.):
For more information on authenticating users, contact us directly.

The CJDB also allows you to download MARC records for your holdings in CUFTS. You will need to configure some of the settings here:

856 Link Label: this will allow you to customize the link in your records to the journal. Left blank, the URL itself will appear.

Duplicate Title Field: If you would like a duplicate title field, add it here.

Holdings Field, Indicators, and Subfield: Specify which field you wish contain your holdings information.
CJDB ID Field, Indicators, and Subfield: Specify which field should contain a unique CJDB identifier. This is useful for deleting old CJDB records before adding a fresh batch.

Medium Text: Customize the wording of your e–journal medium (e.g., [electronic resource]).

Dump Direct 856 links: By default (No), all 856 links in the MARC records will be CJDB URLs. If you change this to Yes, the 856 links will point directly to the vendor’s web site.

Once this information has been completed, go to the CJDB Data section to generate your MARC records.

For more information on MARC records in CUFTS, contact us directly.

5.5 CJDB Data

5.5.1 Rebuilding Your CJDB

The CJDB Data tab adds records to your CJDB.

Currently, you will need to rebuild your CJDB whenever you make a change to CUFTS or upload a new MARC communication file.

If you want an electronic–only CJDB, you can check the ‘rebuild electronic only’ box and press Submit.

IMPORTANT: If your CJDB contains print records DO NOT USE ‘rebuild electronic only’. Use ‘rebuild with print’, even if you are only making
changes to your electronic records. Choosing the electronic only option will delete all of the print journal records from your CJDB.

![Figure 89: Rebuilding an electronic only CJDB](image)

However, if you would like to have a CJDB that includes electronic holdings as well as print and microform, you will need to upload a MARC communications file from your ILS, which contains the records of all of your serials.

The first time you do this, send the MARC communications file to researcher-support@sfu.ca (if you are using an SFU Library hosted CUFTS). We will make sure it will work for you during the initial set up. Once we have everything in place, you will be able to use this screen to keep your CJDB up to date with your latest MARC records.

To upload your MARC communication file, use the **Upload File** tool, and click on **Upload**:

![Figure 90: Uploading MARC Records](image)
Next, check the **Test** box, and press **Submit**:

![CJDB print MARC record files](image)

**Figure 91**: Testing your records

This will test your records and produce an error report of any problems. This report will be emailed to the address entered in your CUFTS **Site Settings, General** tab.

When you have fixed any problems in your MARC records (e.g., inaccurate ISSNs), you can upload them to CUFTS again, but this time select **Rebuild** instead of **Test**. Click **Submit**. Your records will be added overnight to your CJDB. You can update your records as frequently as you wish.

Each time you make a change to your electronic holdings in the CJDB (e.g., activate a new resource), you will also need to **Rebuild** your CJDB to make the changes visible to your users. Again, select **Rebuild** and click **Submit**. Your records will be added overnight to your CJDB.

![CJDB print MARC record files](image)

**Figure 92**: Rebuilding with Print
5.5.2 MARC Records

To download MARC records of your holdings in CUFTS, go to the CJDB Data screen:

![MARC data]

This will provide you with two files: a human-readable text file and a MARC format file, suitable for uploading to your ILS. These records will include all titles you have activated in CUFTS.

5.5.3 LC Call Number File

To customize the subject headings and subheadings of your CJDB, use this upload tool to add your own spreadsheet of call numbers and subject categories. See the previous Journal Subjects section for details.

5.6 CRDB Settings

The CRDB Settings allow you to decide which ERM fields should appear in the CRDB public interface, in the CRDB staff interface, and which fields will be editable by your librarians.

Use the arrows in the left column to shift the fields into the active column. Then, use the Staff View check box to add the field to the staff interface (these will not appear in the public interface – information such as “allows ILLs”, etc. – useful for staff but not of interest to the public).
Use the Edit checkbox to make the field editable directly in the CRDB by your staff.

See the CRDB section for details on how this will work.

![CRDB full display fields]

**Figure 94:** CRDB Settings

### 5.7 C*DB Accounts

The C*DB Accounts page allows you to maintain the CJDB and CRDB accounts of your staff and user community.

![CJDB account search]

**Figure 95:** General Settings
Once you’ve successfully searched for an account (using login, name, or email), click on the linked login name to see the full account.

![Account Details and Roles](example.png)

*Figure 96: Modify Accounts*

From here, you can change the name, email, level, or password. You can also activate or de-activate the account, and determine whether the user can edit ERM records and view the staff CRDB interface.

6. CUFTS Tools

In addition to the Knowledge Base, Electronic Resource Management, CUFTS Resource Database, CUFTS Journal Database, and link resolving, CUFTS also provides free services to the wider library community, including Journal Searching and Resource Comparison.
To access these services, visit the public CUFTS site at:

http://researcher.sfu.ca/cufts

You can also compare resources within the CUFTS administrative interface, by selecting Tools from the left menu.

6.1 Resource Comparison

Resource Comparison provides rapid analysis of journal titles and coverage dates in all of the different electronic collections listed in CUFTS.
Pick between two to four resources and find out what the overlap is and what titles are unique to each resource:
The first table will provide details on any duplication between the two resources:

<table>
<thead>
<tr>
<th>Title</th>
<th>ISSN</th>
<th>ABI/INFORM Global - Proquest</th>
<th>Academic Search Premier - EBSCO</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACM Computing Surveys</td>
<td>1557-7341</td>
<td>1995-12-01</td>
<td>1971-03-01</td>
</tr>
<tr>
<td>ACM Transactions on Computer Systems</td>
<td>0360-0300</td>
<td>1996-06-01</td>
<td></td>
</tr>
<tr>
<td>ACM Transactions on Database Systems</td>
<td>0373-2071</td>
<td>1995-02-01</td>
<td>1996-08-01</td>
</tr>
<tr>
<td>ACM Transactions on Information Systems</td>
<td>0362-5915</td>
<td>1994-03-01</td>
<td>1995-12-01</td>
</tr>
<tr>
<td>ACM Transactions on Information Systems</td>
<td>1557-7344</td>
<td>2007-03-01</td>
<td></td>
</tr>
<tr>
<td>ACM Transactions on Information Systems</td>
<td>1557-7346</td>
<td>2007-02-01</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 99: Duplicates**

The second section will show what is unique to the first resource:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources unique to ABI/INFORM Global - Proquest</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 100: Unique titles**

And the last section will show what is unique in the second resource:
6.2 New Resource

Using the New Resource tool, you can quickly compare one resource under consideration with all other resources in the CUFTS knowledgebase:

![Compare new resource...](image)

Figure 102: Compare New Resource

It will first display a list of unique titles in the new resource:
And further down the page, it will present a list of all titles that are already included in other CUFTS resources:

**Figure 104: Duplicate Titles**

7. CUFTS Resource Database

Once you have added your resources to the ERM section of CUFTS and configured your CRDB settings, you will be able to view your CUFTS
Resource Database or “database of databases”. If you are using the SFU Library hosted CUFTS, it can be accessed at:

http://cufts2.lib.sfu.ca/CRDB/BVAS

Remember to change the location code (BVAS = SFU Library) to your own.

Figure 105: CRDB Interface

A. You and your staff can create CRDB user accounts, to access staff only fields (see previous section on CRDB Settings) or to edit some ERM fields (see below).

B. Your Subjects will appear as you add them to CUFTS (see Tables).

C. You can browse an alphabetical list of databases from the A–Z list.

D. If you use dbWiz for federated searching, you can integrate it here.

E. Finally, a Google Scholar search box is here (but can be removed by editing the interface template).
7.1 Creating a CRDB Account

To create a CRDB account, go to the CRDB and select, the Create link in the upper-right corner. Fill in the resulting screen:

![Figure 106: Creating an Account](image)

On return visits, simply use the Login link (again, in the upper-right corner) to access your account.

This account is completely separate from a CUFTS Maintenance Tool account. In this way, you can give your staff access to editing aspects of the CRDB (subjects, descriptions) WITHOUT needing to log into the Maintenance Tool.

7.2 Searching Subjects

If you have created subjects in the Tables section of CUFTS, they will appear in the dropdown Subjects menu. To view the resources associated with a subject, select one (e.g., Accounting):
The Accounting page provides information about the subject, such as the contact librarian, and a list of “Top Resources” and “Other Resources”.

On the left sidebar, the user can refine the search alphabetically (e.g., limit the resources to those starting with A), change to a different subject, or limit by Keyword, Content Type, or Resource Type.

### 7.2.1 Direct Subject Modification

Using their CRDB account, your subject librarians can modify the position of the different resources on the subject list, moving the best choices to the top.
Figure 108: Re-ordering Subject Lists

To do this, they would log in to the CRDB (NOT to the CUFTS Maintenance Tool). Next, they must bring up the Subject Listing they wish to modify. A [rank] link next to each resource (this is invisible to users) can be clicked and dragged to wherever they’d like the resource to appear.

In this way, your subject librarians can modify the public subject display WITHOUT needing to log into the CUFTS Maintenance Tool.

7.3 Browsing Databases

From the CRDB main page, users can select a letter from the A–Z list to see all of the resources beginning with that letter (e.g., “B”):

Figure 109: Alphabetical Browsing
The resulting list can also be limited by subject, keyword, content type, or resource type:

![Database search home](image)

**Figure 110: Alphabetical Display**

On this page, the user can see the list of resources, a brief description (which you entered in the ERM section earlier), and a Connect link (based upon the URL you entered in the ERM section).

Clicking on the Connect link will take the user directly to the resource. Clicking on the title takes them to the full record for the resource:
In this example, the following fields were enabled for public viewing in the CRDB Settings (see previous section): Online Access, Full Description, Coverage, Resource Type, Print Equivalents, Simultaneous Users, and Subjects. You are, however, able to make any ERM fields you choose visible to your users.

### 7.3.1 Direct Record Modification

While you or your subject librarians are still logged into your CRDB account, it is possible to quickly modify the resource record. To do this, use the Edit button (a pencil image). This will open an editing box where you can make the changes and save them:
This allows for quicker updating, and does not require logging into the CUFTS Maintenance Tool.

7.4 CRDB Staff View

When logged in, your staff can also see additional fields, which are invisible to regular users, such as “Allows Email” or “Allows ILL”:
These staff-only fields were set in the CRDB Settings in the previous section.

8. CUFTS Journal Database

Using CUFTS, your library can provide users with a database of all your journals, including print, microform, and electronic.

It is highly customizable, provides both alphabetical and subject browsing, and is searchable by keyword, title, subject, publisher or association, and ISSN:
Figure 114: Simon Fraser University Library's CUFTS Journal Database

Search results are initially displayed as brief records:

Figure 115: Result list with brief information
It is possible to include information on citation and fulltext coverage, or just limit to fulltext. The order of the electronic holdings is controlled by the **Rank** number set during the CUFTS Local Resource activation.

The Journal Note was added in the Local Resources, by editing the individual journal in the Lexis Nexis Academic II resource.

Clicking on the journal title provides fuller details:

![E-JOURNALS](image)

**The Canadian geographer. Géographe canadien**

**ISSNs:** 0008-3658, 1541-0064

**AVAILABILITY**

**Academic Search Premier - EBSCO**
- **Fulltext Coverage:** 2003-09-01 -
- **Emargo Period:** 12 months
- **Link:** [Click here to access journal](#)

**Blackwell-Wiley - Wiley-Blackwell**
- **Fulltext Coverage:** 2003-01-01 (v.47 i.1) -
- **Link:** [Click here to access journal](#)

**CBCA Complete - Proquest**
- **Fulltext Coverage:** 1995-12-01 - 2006-10-01
- **Link:** [Click here to access journal](#)

**Lexis Nexis Academic II - Lexis-Nexis**
- **Fulltext Coverage:** 1987-03-01 -
- **Link:** [Click here to access journal](#)
- **Journal Note:** The years 1988-1990 are missing from Lexis-Nexis.

**CPI.Q - Gale III**
- **Fulltext Coverage:** 2001-09-01 - 2007-06-30

*Figure 116: Detailed record*

Print details can be included by uploading your MARC records to CUFTS.
See the **Site Settings** section for information on setting up and customizing your own CJDB.

You can try Simon Fraser University Library’s CJDB here: [http://cufts2.lib.sfu.ca/CJDB/BVAS/](http://cufts2.lib.sfu.ca/CJDB/BVAS/)

### 8.1 Creating a CJDB Account

CJDB users can create their own CJDB accounts, allowing them to organize their own collections of journals. To create a CJDB account, go to the CJDB and select the **Create** link in the upper-right corner. Fill in the resulting screen:

![Figure 117: Creating an Account](image)

On return visits, simply use the **Login** link (again, in the upper-right corner) to access your account. Once logged in, users have the ability to view their account details, under **My Account**, or to see their tagged journals:

![Figure 118: My Tags](image)
8.2 Selected Journals: Tagging

One way that the CJDB lets you organize your journals is through tagging. Tagging is the addition of one or more brief, descriptive terms (tags), which allow for the development of more informal classification systems. Tagging has become an important element of the social Internet, used for describing and sharing bookmarks (http://del.icio.us/) and photographs (http://www.flickr.com/).

In Figure 35 above, the journal, *Canadian Geographer*, has been tagged (by an authorized librarian) as *Geography*. In the following figure, you can see a large list of tag categories created at the SFU Library:

<table>
<thead>
<tr>
<th>E-JOURNALS - SELECTED</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting</td>
<td>Environment and Society</td>
</tr>
<tr>
<td>African Diaspora</td>
<td>First Nations Studies</td>
</tr>
<tr>
<td>Anthropology</td>
<td>French Language Periodicals (all subjects)</td>
</tr>
<tr>
<td>Asian Studies</td>
<td>French Linguistics</td>
</tr>
<tr>
<td>Biological Sciences</td>
<td>French Literature</td>
</tr>
<tr>
<td>Business Administration</td>
<td>Geography</td>
</tr>
<tr>
<td>Canadian Studies</td>
<td>Gerontology and Aging</td>
</tr>
<tr>
<td>Cardiology</td>
<td>Health Administration</td>
</tr>
<tr>
<td>Chemistry</td>
<td>Health Care and Epidemiology</td>
</tr>
<tr>
<td>Classical Studies</td>
<td>History</td>
</tr>
<tr>
<td>Cognitive Science</td>
<td>Human Rights</td>
</tr>
<tr>
<td>Communication</td>
<td>Humanities</td>
</tr>
<tr>
<td>Computer Science</td>
<td>India Studies</td>
</tr>
<tr>
<td>Computer Science, Artificial Intelligence</td>
<td>Intercultural Communication and Diversity</td>
</tr>
<tr>
<td>Computer Science, Cybernetics</td>
<td>Kinesiology</td>
</tr>
<tr>
<td>Computer Science, Hardware and Architecture</td>
<td>Latin American Studies</td>
</tr>
<tr>
<td>Computer Science, Information Systems</td>
<td>Linguistics</td>
</tr>
<tr>
<td>Computer Science, Interdisciplinary Applications Mathematics</td>
<td></td>
</tr>
</tbody>
</table>

*Figure 119: Tagging Categories*

The display of the categories is simply a list of links that will be automatically populated as titles are tagged. *Canadian Geographer* appears, together with other geographical journals, under the category, Geography:
The URL for this category is:

http://cufts2.lib.sfu.ca/CJDB/BVAS/browse/bytags/geography?level=100

You can modify your list of Selected journals using the selected_journals_data template, found under Site Settings, Templates:

In the template editing window, you will see the default list of selected categories. You can change any of these as you wish:
See the Site Settings section for more information on editing templates.

Tagging can be limited to library staff, but it is also possible to open it up to faculty or even students. This allows them to create their own personal journal collections, for a class or for personal use. However, note the suffix on the URL (level=100). Adding this ensures that only tags created by “Level 100” users (i.e., librarians), will appear in the category. This eliminates the possibility of non-library staff mistakenly adding inappropriate titles to your categories. Faculty could be given a rank of “50”, and students “0”.

To add a tag to a journal, you must search for it in the CJDB, and then view its full record. In the My Tags section, you will see a link to ‘add/manage tags’.
This will expand the My Tags section:

![My Tags Section]

**Figure 124**: Adding/Managing Tags

Any existing tags can be deleted from this record. Tags can be **private**, viewable only by the user, they can be **public**, viewable by all CJDB users, across COPPUL and BC ELN libraries (or for all CJDB users of a single installation of CUFTS), or they can be **local public**, which means that only users in the home institution can view those tags.

### 8.3 Turning Off Tagging

If your library decides against using the tagging function, you can remove it by following these steps:

**Step 1: Remove the user login information**

The CJDB log in function is only needed for tagging. It should be removed if tagging is not made available.

In the nav_line.tt template, comment out this line:

```plaintext
[ %# PROCESS loggedin.tt %
```

(note: the addition of the hash symbol # immediately after the percentage symbol % comments out the line)
Step 2: Remove “Selected” from the navigation bar

The “Selected” journals list is a list of librarian–tagged journals. Without tagging, it is unnecessary.

In the menu.tt template, use HTML commenting on this line:

```
<!-- <a href="[% url("$url_base/browse/selected_journals") %]">Selected</a> -->
```

Step 3: Remove Border Line

Removing the login option results in an unnecessary border line on the user interface.

In the style sheet, change the border-bottom value to 0 for this entry:

```
div#navline {
   padding-top: 2px;
   padding-bottom: 3px;
   vertical-align: middle;
   border-bottom: solid 0px #004997;
   float: left;
}
```

Step 4: Remove tag search option

With tagging disabled, you will want to remove tag searching from the dropdown menu of search options.
In the browse.tt template, comment out this line:
Step 5: Remove browse selected

In the browse.tt template, comment out this line:

```html
<!--<a href="[% url($url_base/browse/selected_journals") %]">Browse selected journals</a>-->
```

Step 6: Removing Tag field from journal detail page

Each journal record displays the associated tags. Without tagging, this section is not needed.

In the journal.tt template, use the hash symbol to comment out this line:

```html
[%#– PROCESS journal_tags.tt –%]
```

If your library decides to re-enable tagging in the future, simply remove the comments.

### 8.4 Journal Subjects

Another way journals can be organized in the CJDB is by subject listing. By default, the following categories are used, based on a highly modified version of the Library of Congress Call Number Classification Outline:
To make these categories more user-friendly, some changes have been made, such as combining Science, Agriculture, and Technology. Psychology has also been removed from Philosophy and Religion, and placed as a sub-category under Social Sciences.

Clicking the + symbol reveals the underlying sub-categories:
The journals are connected to the categories and sub–categories using the LC call number information supplied by the added MARC records. Unfortunately, journals without MARC records will not have this call number information, and therefore, will not appear in the subject listings.

As more MARC records are added to CUFTS (either through contributed records from partner libraries, harvesting from publicly–accessible sources, or manually adding important ones), we will see an increasing number of journals appearing under these categories.

The organization of the categories and sub–categories is based on a simple spreadsheet that any library can modify. It consists of four columns: call number start, call number end, category, and subcategory:
To change the subject categories, contact us for a copy of default spreadsheet, make your changes, and upload it under Site Settings, CJDB Data, and LC Call Number File (see the Site Settings section), using the upload tool.

9. CUFTS Customizations

This section will outline some of the customizations you can make to your library's CUFTS installation or account.

9.1 CJDB Interface

By default, your CJDB will have a dropdown menu for title, subject, association, ISSN, or tag searching:
E-JOURNALS

Browse e-journals by title:

0-9 - A - B - C - D - E - F - G - H - I - J - K - L - M - N - O - P - Q - R - S - T - U -

Search for journals by:

<table>
<thead>
<tr>
<th>Title</th>
<th>Subject</th>
<th>Association</th>
<th>Tag</th>
<th>ISSN</th>
</tr>
</thead>
</table>

NOTE: This database allows you to search for individual e-journals. To search for an article simultaneously, you should begin with one of the Library’s periodical indexes.

Figure 129: Dropdown menu

You have the option to change this to a tabbed interface:

E-JOURNALS

Browse e-journals by title:

0-9 - A - B - C - D - E - F - G - H - I - J - K - L - M - N - O - P - Q - R - S - T - U -

| Title | Subject | Association | Tag | ISSN |

NOTE: This database allows you to search for individual e-journals. To search for an article simultaneously, you should begin with one of the Library’s periodical indexes.

Figure 130: Tabbed browsing

The advantage of this option is a more obvious range of choices for your users. In addition, it also provides some system prompting when searching for tags or ISSNs. For example, when a user begins typing some letters in the tag search, the CJDB will present them with a list of matching tags to choose from:

E-JOURNALS

Browse e-journals by title:

0-9 - A - B - C - D - E - F - G - H - I - J - K - L - M - N - O - P - Q - R - S - T - U -

| Search tags | Search |

NOTE: This database allows you to search for individual e-journals. To search for an article simultaneously, you should begin with one of the Library’s periodical indexes.

Figure 131: CJDB prompts
This can be very helpful when a user is unsure what tags already exist.

To activate this feature, go to the browse.tt tag, and move the # symbol from “PROCESS browse_form_alt.tt” to “PROCESS browse_form.tt”:

![Figure 132: Browse Template](image)

If you change your mind, you can simply switch the # symbol back.

10. Further Questions

If you have any additional questions about CUFTS, please contact us at researcher-support@sfu.ca
11. Appendix

The latest CUFTS developments have been focusing on the ability to import COUNTER and SUSHI data to enhance the statistics available in the system. This guide is intended to quickly walk you through the steps to getting started.

11.1 Getting Started with COUNTER and SUSHI

Step 1: Make sure you have all of the necessary data from your vendors, whether it is COUNTER spreadsheets that you have downloaded or SUSHI harvesting information (customer identifiers, harvesting URLs, etc.).

Step 2. Create an ERM record for each of the resources that you have COUNTER or SUSHI data for (see Section 3.4).

Step 3. Create a new SUSHI record (see Section 3.5) and a new COUNTER record (see Section 3.6) for each resource that you have data for.

Step 4. Link the COUNTER/SUSHI data to the ERM record (see Section 3.4.6).

Step 5. Run your statistical reports (see Section 3.7.2).

This feature is still in development, and the vendors are just beginning to provide standards-compliant data, so you may expect some errors when trying this for the first time. Please let us know of any problems you encounter and we will do our best to help!