Librarian's Guide

Your World of Legal Intelligence

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Purpose and Audience

The purpose of this document is to give librarians the ability to get the most value out of their vLex subscription. The main topics covered are:

- setting up the best authentication solution for your needs.
- linking vLex to existing library systems.
- monitoring usage and training your users.

This guide does not cover the use of vLex.com from the point of view of the end-user. Please refer to the Help Centre for end-user documentation and training.

Setting up vLex access for your users

IP access

IP access is a simple and quick way for subscribers with Academic, Government or Corporate accounts to provide access to their users. The Account Administrator should contact customer service at support@vlex.com and indicate the list or range of IPs that you want to activate.

Once the link is activated, access is never personalised. Users can create a personal corporate account or log in (if the user had previously created an account) to the vLex platform and access personalised features.

HTTP Proxy

HTTP Proxy access is available for vLex subscribers with Academic, Government or Corporate accounts who own and maintain an HTTP proxy server. It is not available for Open (free) or Professional accounts. The Account Administrator should contact customer service at support_academic@vlex.com and indicate the list or range of proxy IPs that you would like to activate.

Once our IT team has completed the implementation we will provide you with a URL address that you must use to access the service.

The supported proxy implementations are:

- EZProxy
- WAM proxy

Proxy access is always non-personalised (anonymous). The user can create a personal corporate account or log in (if the user had previously created an account) to the vLex platform and access personalised features.

Access via SSO and personal account (Single Sign-On)

Single Sign-On (SSO) and personal account is an authentication option that offers the best experience for clients with Academic, Governmental or Corporate accounts:

- Users can access vLex from any device, in any location, with no IP restrictions and without the need to remember an additional username or password.
- Each user benefits from a personal vLex account (personal corporate account) and can use all personalised features such as creating alerts and notes, following SmartTopics, documents and resources, customising news, creating personal folders or reviewing search history.
- As an Account Administrator, you have access to complete statistics including the number of users using vLex and the frequency of their individual use.

vLex provides several SSO implementations:

- Shibboleth
- SAML
- LTI

vLex SSO Protocol

The vLex SSO Protocol is the simplest way to provide a Single Sign-On experience. Your IT team will install a code page in a private area of your website, and users who go to that page will be redirected to vLex, where they are already authenticated.

How does SSO work?

When the user enters vLex via SSO, vLex first checks that the user is correctly authenticated. If they are:

- If there is an account in vLex with that email address, the user will log in to that account.
- If there is no user with that email address, a new personal corporate account will be created and the users will log in to that new account.

Anonymous SSO access (without personal account)

To enable anonymous SSO access, our IT team can provide you with the following information:

- "Authentication Token": This is a code between vLex and your organisation that must be copied into the SSO code, and included in your website. It is important to not give any third-party access to this information. If you regenerate this code, you must also update the code on your website.
- "Account ID": You should copy your vLex Account ID into the SSO code of your website.

Now your IT team needs to copy the SSO code on your web page.

Anonymous SSO code page

Your IT team needs to create a page on your private server that verifies that a user is correctly logged in and, if so, perform an HTTP redirect to the authenticated link.

How do you create the link?

vLex provides a sample code for this link so that you do not need to program it. The code is available in several programming languages (C, Phyton, Ruby, PHP, ASP, ASP.NET) and is available at https://github.com/vlex/remote_auth with a public domain license.

However, if you would like to program it yourself, full instructions are available at https://kb.vlex.com/en/knowledge-base/anonymous-sso-access-without-personal-account/

vLex Mobile

vLex works on any browser or device including desktops, tablets and mobile phones. But in order to offer an even better user experience for users on mobile phones, vLex offers vLex Mobile, a native application for iOS and Android.

On vLex Mobile, you will be able to see all of the content that is available in your subscription.
Access to documents outside of your subscription is still available through the use of vLex credits, a credits balance associated with your account.

vLex Mobile features:

- Personalised news, based on your SmartTopics: Don't miss out on any legislative changes and save time with SmartTopics. View, in real-time, the most relevant documents from a particular legal concept on your smartphone or tablet.
- Simple universal search feature: Have the power of the vLex search engine on your mobile device. Go to "Search" and enter the terms you are looking for. View SmartTopics, featured documents, popular terms, sources, etc.

- View all of the vLex content available in your subscription, or via open access, including links.

Setting up Athens / Organisation

Setting up Athens / Organisation ("Shibboleth") login allows users to sign in with the following mechanisms:

- Your Institution (often referred to as Shibboleth)
- This allows users to sign in with their university or library credentials

OpenAthens

This allows users to sign in with the username and password for an OpenAthens account that they may use for many different resources. These options are normally relevant for academic users and may be referred to as federated login or SSO.

How can customers use these?

These sign-in mechanisms need to be set up for each account before they can be used, which allows the vLex team to attach a customer's OpenAthens or Institution account to a vLex account.

Simple Steps

The customer needs to provide vLex with the scope for their institution. This is something that their library team or IT will know. The scope will probably look like a domain name for the university e.g. *brighton.ac.uk*

Your Institution (not OpenAthens) customers should also provide vLex with their institution's Entity ID. The entity ID will probably look like a URL e.g. *https://idp.bsms.ac.uk/shibboleth*

Please send this information, alongside the vLex ID or a link to the ERP account to engineering@vlex.com, so a direct ticket is opened with the IT support account.

WAYFless Links

A popular feature with users is "Wayfless" login - this is a URL that shortcuts selecting Institution from the login screen and then picking your institution from the Athens Wayfinder:

The link to be shared with the customer is in this format:

https://login.vlex.com/?wayfless=1&entity={their entity ID}, e.g.

https://login.vlex.com/?wayfless=1&entity=https://idp.nuigalway.ie/shibboleth

Technical Prerequisites

Many universities will already have this in place, but please do check first.

- The university or organisation will need to have set up and configured their own Identity Provider (IdP) software - the most common implementation is Shibboleth.
- The IdP will need to be registered in an "access management federation", the most common being the OpenAthens federation (OAFed) or the UK Access Management Federation (UK Fed). Most universities already have this in place.
- Their IdP needs to be configured to release an "attribute" called **eduPersonScopedAffiliation** which allows our system to uniquely identify their organisation.

Setting up Active Directory

Setup

You will need to tell a member of the vLex support team that you want your users to be able to log in with Active Directory. We need to know the email domain(s) of your users so that we can connect your vLex account to your Microsoft Active Directory.

Approval

Depending on your organisation, a user with the right permissions in your Active Directory may need to approve the vLex application. The easiest way to do this is for them to sign in, and they will only need to do it one time.

They can do this either from the login screen at https://login.vlex.com (selecting Active Directory) or using this link https://login.vlex.com/session/auth/active-directory.

You will see a screen like this that asks you to approve the application. Clicking Accept will allow you to access vLex and also make the application visible in Azure AD.

When this step has been completed, all users in your AD will have access to vLex. You optionally configure which users have access in the Microsoft Azure AD portal under Enterprise Applications. You will find one called vLex.

From that point on only users that have been allowed to access this application in the portal will be able to sign in to vLex.

You can find more information on configuring the application in the Microsoft portal here:

https://docs.microsoft.com/en-us/azure/active-directory/develop/howto-restrict-your-app-to-a-set-of-users

Helping users find vLex content

Loading records to your organisation catalogue:

MARC 21 Records

MARC 21 is a standard for the exchange of information that allows for the structuring and identifying of data in such a way that it can be recognised and manipulated by a computer.
At vLex we have all of the sources in our database catalogued in MARC 21, so they can directly be incorporated into library catalogues. Having all of the documents incorporated into a library catalogue makes it easier for users to find the content they are looking for.

How can I download the vLex catalogue in MARC 21 format?

Go to https://vlex.com/librarians-center/ to download a single file with the MARC doctrine records in the MARC 21 format (.mrc) from the Librarian Centre. To download the MARC records from a particular source, you can use the direct links included on the Librarian Centre.

Federated Search Solutions

ExLibris SFX integration

With SFX, a user interested in a particular document that is cited in a database can:

- Immediately see if the document is available electronically and link directly to the full text.
- Locate it in other formats and request a copy.

vLex sources can be linked using the Ex Libris SFX server so that when a user searches for a document or source, it creates a link to the resource in vLex.

What should I do to link vLex to ExLibris SFX?

Contact the Ex Libris service centre to include VLEX in the SFX installation. This feature is available for Academic, Corporate or Government Edition subscriptions.

MetaLib Integration

MetaLib is a federated search system developed by Ex Libris Group. MetaLib conducts simultaneous searches in multiple information resources such as library catalogues, articles, newspapers, etc.

EBSCO Discover Service integration

EBSCO Discovery Service allows a user to use a single search engine to simultaneously search several different subscription services that their library has purchased or contracted, including a full-text search of vLex titles.
For the institution, this allows you to maximise the use of your vLex subscription. For the user, this integration allows you to discover content available from vLex when performing searches that are not for the typical legal information (i.e. an economics student can find doctrine, laws or news available in vLex.)

vLex Chrome extension

The vLex Chrome extension saves you time and improves the quality of your daily work by:

- Incorporating relevant vLex results into your Google searches when you use the Chrome browser.
- Automatically enriching the pages you visit with links and references to the most relevant documents on the vLex platform.

How to Install

1. Go to the Chrome Store and click on the button at the top of the page ("Add to Chrome") to start the installation.

2. When the installation process has finished, you will see an icon appear next to your navigation bar.

How to Use

1. When you perform a search in Google you will see that, when searching in legal terms, an additional box appears with results and any related legal news highlighted in vLex.

2. Click on the result you are interested in to access it directly on vLex.
   - If you are logged into vLex, it will directly show you the results on the vLex page.
   - If you are not logged into vLex, it will ask you to log in to access the content.

Learn more: https://vlex.com/chrome-extension/

Linking to vLex content

Creating an SFX button on vLex

For subscribers that have implemented the SFX server and want to implement the SFX button in vLex.

Requirements:

- Have IP access configured.
- Have the "Base URL" and "Button URL" fields defined.

Example

A customer with these fields:

url address: http://example.com:3410/sfxlcl24

SFX Button: http://example.com:3410/sfxlcl24/sfx.gif

That client must change the url address used to access vLex through IP access (http://vlex.com/account/login_ip) to this new url address that uses the SFX parameters:

http://vlex.com/account/login_ip?sfxbaseurl=http://example.com:3410/sfxlcl24&sfxbutton=http://example.com:3410/sfxlcl24/sfx.gif

By using this URL to authenticate the user, vLex will include the defined SFX button while navigating the books and magazines contents.

Citing vLex content

RefWorks integration

RefWorks is a web-based bibliography and database manager: it allows vLex and RefWorks users to easily create a bibliography and export it in different citation styles from any vLex document.

RefWorks makes it easier for researchers and authors who are writing articles, papers or doctoral theses to ensure that the citations in their article are correctly written in the desired standard (e.g. Chicago or APA).

How does it work?

1. Perform a search.

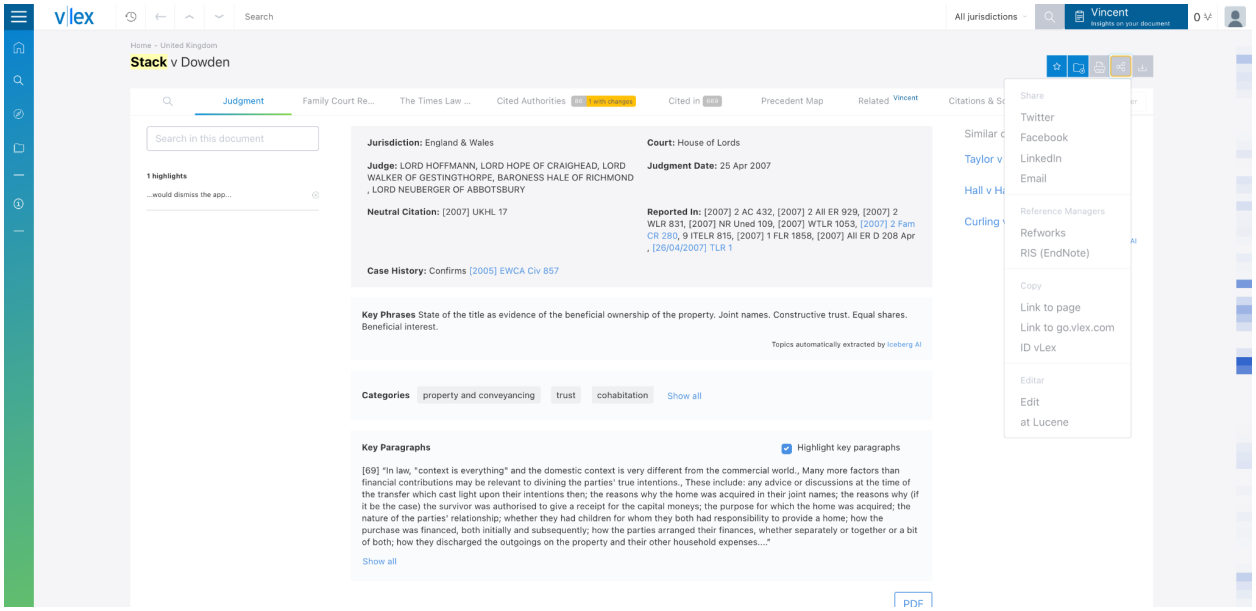
Search for documents in vLex.

2. Send to RefWorks.

Highlight the reference you want to import, select the "Send to" icon and then the bibliographic manager "RefWorks." You will then be redirected to the RefWorks website to start your session.

3. Import in RefWorks.

The chosen reference will automatically be imported into the "Last imports" folder of RefWorks.



EndNote integration

EndNote is a commercial bibliographic citation management software marketed by the Clarivate Analytics company. It is an online reference managing tool that allows you to create a customised database of more than 10,000 references by importing online database citations or text files. The references can be organised into files, allowing you to create a bibliography quickly and easily. It offers a wide range of citation styles (more than 3,200 citation formats).

EndNote facilitates the work of researchers and authors who are writing articles, papers or doctoral theses by ensuring that their citations are written correctly for the standard they need (i.e. Chicago or APA.)

How does it work?

1. Perform a search.

Search for documents in vLex.

2. Send to EndNote.

Highlight the reference you want to import, select the "Send to" icon and then the bibliographic manager "EndNote".

3. Import in EndNote.

The selected reference is automatically downloaded in an EndNote-compatible.ris file.

Monitoring vLex usage

COUNTER Statistics

The Counting Online Usage of Networked Electronic Resources (COUNTER) statistics provide consistency, credibility and compatibility standards to record and generate reports of online usage statistics among providers. The COUNTER reports provide usage statistics, audited by COUNTER and available on vLex.
Contact support_academic@vlex.com to activate this feature.

How to access COUNTER statistics?

1. Go to your profile, accessed in the top-right corner, and select "Manage your account".
2. Select "Statistics" in the left-hand menu and click on "COUNTER reports".
3. View usage statistics and download a monthly report.

Description of COUNTER reports

See the following list for report descriptions:

BR2 - Book Report 2: Number of successful section requests by month and title

DB1 - Database Report 1: Total searches, result clicks and record views by month and database

JR1 - Journal Report 1: Number of successful full-text article requests by month and journal

JR5 - Journal Report 5: Number of successful full-text article requests by year.of.publication (YOP) and journal

SUSHI

vLex uses SUSHI, which is a communication protocol used between vLex and clients to obtain the COUNTER statistics in XML, the standard format.

Contact support_academic@vlex.com for the configuration parameters of the SUSHI protocol.

Getting Help

Training

We encourage you to provide vLex training to your key users. On-site and remote training sessions by vLex personnel are available free of cost. Contact your Sales Representative or check our training centre at http://vlex.com/training_center/

Help Centre

Direct your users to the Help Centre at http://vlex.com/help_center for self-support. This page contains a list of Frequently Asked Questions, search tips and screencasts.

Contacting Support

Every page on vLex contains a HELP button on the left-hand side of the page. Once you click on it, the option "contact helpdesk" will be available. Users will have the opportunity to chat with a support agent or open a ticket.

Phone support is also available. See http://vlex.com for an up-to-date list of phone numbers.

List of integrations and applications

Work better together with vLex's out-of-the-box integrations and applications.

Find out more about our integrations: **https://vlex.com/integrations/**

Available integrations:

RefWorks

A citation management tool that allows users from both vLex and RefWorks to easily create a bibliography and export it in a standardised format (such as Chicago or APA).

MARC 21

All vLex content has been catalogued using MARC 21 standards (.mrc) to be directly incorporated into your library's catalogue.

COUNTER

The vLex platform is fully compliant with COUNTER, allowing you to monitor your usage with confidence.

EZproxy

vLex provides a certified configuration of EZProxy that allows remote access. If you are using another HTTP Proxy provider and would like us to certify the compatibility of vLex, please email hello@vlex.com.

Dropbox

You can upload your own documents into vLex Cloud from Dropbox to enhance your legal research effectiveness. This allows you to locate relevant information quickly from your own personal files or from vLex, simultaneously.

Microsoft OneDrive

Using Microsoft OneDrive with vLex allows you to enhance your legal research effectiveness and locate relevant information quickly. OneDrive connects seamlessly with vLex Cloud to improve your searching and productivity by allowing you to search across your own documents and the millions of vLex documents simultaneously.

Chrome Extension

Install the vLex Chrome extension to bring legal news from vLex to the top of your Google results, and filter important legal information seamlessly in your daily searching.

ExLibris SFX

vLex sources can be linked using the Ex Libris™ SFX™ link server. Contact Ex Libris™ support to add vLex as a resource to your SFX™ installation.

EndNote

EndNote is an online reference management software, developed by Clarivate Analytics and used to manage bibliographies and references.

EBSCO

The EBSCO Discovery Service allows you to search across all of your library content providers (including vLex) from a single search box.

SSO Options

Options for Single sign-on for vLex include Shibboleth, SAML, OAuth, Google Apps and vLex SSO protocol. These allow for seamless integration to library and enterprise identity services, foregoing the need for individual usernames and passwords.

GraphQL API

Access vLex content via a REST & GraphQL API to enable custom integrations and features. Feature only available for academic, government and large law firm accounts.

Legal Search Connect

Formally Solcara, Legal Search Connect is a knowledge management solution that targets and searches all your relevant resources at once.

Help for librarians

For assistance in the topics covered in this guide, please contact hello@vlex.com.

We are ready to assist you in setting up authentication solutions, linking your library systems to vLex and helping your users use our service successfully. We are also interested in suggestions of improvements: please contact us if you would like to improve vLex's compatibility in linking to your server, library catalogue, federated search solution, citation manager or any other component of your library.

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