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Documentation
This document should be used in conjunction with the following files:

Available from the Documentation Center (http://www.exlibrisgroup.com/docportal/):
- ALEPH Version 18 Staff User Guide, Web OPAC section
- ALEPH Version 18 System Librarian Guide, Web OPAC section
- ALEPH 500 System Administrator’s Guide, System Overview section

How To’s Notebook (Web OPAC):
- How to Set Up a Brief View Table (in Tab 6 of this notebook)
- How to Set Up Bases and Filters (in Tab 6 of this notebook)

How To’s Notebook (Indexing/Display):
- How to Add a New Field (in Tab 6 of this notebook)
- How to Add a New Index (in Tab 6 of this notebook)
- How to Change Bib Info Displays (in Tab 6 of this notebook)

Initial Setup

IP Address of Web OPAC
To define the URL or IP address of the Web OPAC, you must edit the www_server.conf file. You can edit the file directly from the alephe directory by using the following shortcut command to get to alephe:

```bash
>>cd $alephe_root
```

Go to the section headed:

```
#     # server Modules
#
```

The following is an example of the definition for this parameter:

```
setenv server_httpd http://ram19:$HTTPD_PORT
```

You will want to change "ram19" to your address.

Web Server
You can monitor, start and stop the Web server (www server) by using the UTIL W menu:
W. Server Management (WWW, PC, Z39)
--------------------------------

0. Exit procedure  
1. Monitor servers  
2. Stop servers  
3. Start servers  
4. View log file

You can also view the server log files with UTIL W. This is useful for reviewing activities and definitions. For an explanation of the log files, refer to the System Overview section of the ALEPH 500 System Administrator’s Guide.

Apache® Server

Since version 14.1, the front-end server has been replaced by the CGI version and the connection is now via the Apache WWW server (or another http server.). The Apache server runs a daemon, that is, a resident program, which waits for requests and serves them on demand. There are numerous advantages in using the Apache server:

1. The Apache server helps to reduce the ALEPH server’s work, thereby improving the response time

2. Standard Modules can be added to improve the Apache and ALEPH servers’ performance when loading icons and pictures

3. You can run ALEPH as a CGI or as a fast CGI

4. You can transfer external files (linked to ALEPH) of types other than plain text

5. You can access Microsoft Word files from the Documentation menu (version 12.1 and higher)

6. You can access Adobe PDF files from the Documentation menu (versions 12.1 and higher)
WWW Display & Other Defaults

Several WWW Server defaults need to be determined on a system level. These defaults are defined in the www_server.conf file, which can be edited directly from $alephe_root/www_server.conf. Several of the defaults are described in detail below the example:

```bash
# default parameters
setenv www_login "FIND-B"
setenv www_con_lng ENG
setenv www_sort_field "01---D02---A"
setenv www_sort_field "01---D02---A"
setenv www_sort_field_aut "03---A01---D"
setenv www_sort_field_sub "01---D02---A"
setenv www_browse_previous N
setenv www_dn_link_display 5
setenv www_z37_course_request_days 20
setenv www_z37_recall_type 03
setenv www_z36h_max_record_limit 30
setenv www_update_session_id "UPDATE_ALEPH"
setenv www_course_email_address "thechoice@exlibris-usa.com"
setenv mark_match_words_prefix "<span class=text3 id=normalb>"
setenv mark_match_words_suffix "</span>"
setenv www_short_max_no_locations "10"
setenv create_statistics Y

# Find limits
setenv set_word_limit 1500
setenv set_prox_limit 100
setenv server_default_charset "iso-8859-1"

# www_user_z36_sort_routine 00
setenv www_user_z36_sort_order A

# www_user_z37_sort_routine 00
setenv www_user_z37_sort_order A

# www_user_z38_sort_routine 00
setenv www_user_z38_sort_order A

setenv www_login "find-b"
```

This parameter defines the html page that will be loaded after the Web OPAC user logs in or clicks the “Guest” button. In order to by-pass the use of the login page as the first page, change the name of the find-b file to “login”. Be sure to make a backup copy of the “login” file first!
setenv www_con_lng ENG
This parameter defines the conversational (or interface) language for the non-profile-driven Modules, like Course Reserves. For the Web OPAC, this value is actually defined in the Profiles window of the Administrative Module of the GUI (Staff) client. Refer to the Web Profiles in this document for more details.

The default result limit and sort limit is 1000.

setenv www_sort_field "01---D02---A"
This parameter defines the default sort order for the results of all Search (Find/Keyword) queries that are not otherwise defined in www_server.conf. The Web OPAC user may change the sort order of a set when the set displays in the Brief View Table format by clicking on the headings, for example click on the underlined "Title" to sort by title.

The numbers 01 and 02 are codes taken from Column 1 of the tab_sort table (UTIL G/1/b). The following is an example of tab_sort:

```
11 12 3 4 5 6 7 8 9 10 12 13 4 15 16 7 18 9
!!-!!-!!!!-!!!!!-!!!!-!!!!!-!!!!-!!!!!-!!!!-!!!!!-!!!!-!!!!!-!!!!-!!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!-
!
01 95 008           260## c                                                 08 0
0 4
02 01 1#### a       700## a                                                 00 0
0 0
03 11 245## a     2 240##       2                                           00 0
0 0
04 22 050##         LOC## hjl                                               00 0
0
05 11 440## av    2                                                         00 0
0
06    TYP##         FMT##                                                   00 0
0
```

In this case, 01 refers to the Year field and 02 refers to the Author field. If you wish to sort the records by a different field, make sure the field is defined in tab_sort. You may also refer to the Web OPAC Tables section at the end of this document for an explanation of tab_sort. The letter "D" for the Year field stands for "descending" order which means that the latest dates will be listed first (e.g., 2005 will be listed before 2004). The letter "A" stands for "ascending" order which means that the Authors will display in order from A to Z. You may, of course, set the order for any field to be ascending or descending, as you wish. Additional sort options that are presented to the OPAC user are defined in the $data_tab/www_f_sort_heading.lng table.

The Browse author and subject indexes are shown in the examples below (Web OPAC users may NOT change these default sort orders):

```
setenv www_sort_field_aut "03---A01---D"
setenv www_sort_field_sub "01---D02---A"
```
The _aut_ and _sub_ in the above parameters refer to the Browse Indexes as defined in `tab00.lng` (UTIL G/1/00). In this case, _aut_ refers to Author and _sub_ refers to Subject. You can define other parameters, but you must use the three-letter code of an index that is defined in `tab00.lng`.

```bash
setenv www_browse_previous  N
```

The browse list can be set to display in one of two ways:

1. The entry that most closely matches the user's query heads the list
2. The entry immediately preceding the closest match of the user's query heads the list

We recommend that the browse list be set to display the immediately preceding entry, as it helps the user understand where (s)he is if the entry that (s)he requested does not appear in the list. Using a “Y” value displays the list headed by the _preceeding entry_, and using “N” displays the list _headed by the entry_.

```bash
setenv www_item_schedule            14
```

This parameter defines the number of days in advance for which slots display in the Advance Booking Module. Consequently, this sets the number of days in advance that a patron can request an item.

```bash
setenv www_dn_link_display          5
```

“Down links” in a record can display in one of two ways:

1. As a separate entry for each down link within the _Full View_ of the record; or
2. As a link to a “Links Window.”

The value in this line determines which of the two options is used. If the number of records found is less than, or equal to, the value defined, there will be a separate entry for each down link in the _Full View_ of the Record. Otherwise the down links display as a link to another window that contains the down links. These down links are often used with analytic records.

```bash
setenv www_z37_course_request_days  20
```

This parameter defines the number of days prior to the beginning of a Course that the system will place a Recall on an item that needs to be placed in the Course Reserves Module.

```bash
setenv www_z37_recall_type           03
```

This parameter defines the type of the request a user can place from the Web OPAC. All requests placed by Web OPAC users will have this one value. In the example above, all requests placed from the Web OPAC will be set as a “No Recall”. Value 02 in this parameter will set all requests from the Web as a “Rush Recall” and the value 01 will set all requests as a “Regular recall.”
setenv www_z36h_max_record_limit 100
From the User information screen of the Web OPAC, users can view the history of their loans sorted by due dates in descending order, (i.e. a due date of 15th July, 2004 precedes a due date of 20th June, 2004). This line allows the System Librarian to set a limit to the number of previous loans that displays in this list. If the line does not appear in the table or if it is commented out, the default number of loans is 80. If the line does appear in the table but there is no value set in this line you will see the following error message: “The document contained no data. Try again later, or contact the server’s administrator.”

setenv www_update_session_id "UPDATE_ALEPH"
This parameter defines the default user profile for Web OPAC Users.

setenv www_course_email_address "thechoice@exlibris-usa.com"
This parameter defines the default email address for alerting the Course Reserves Department that a file has been saved onto the server by a Professor. This parameter is described more completely in the Course Reserves Training document.

setenv mark_match_words_prefix "<span class=text3 id=normalb>"
setenv mark_match_words_suffix "</span>"
In the Full View of a record, the system highlights the search terms that have been used to find the record. This includes highlighting words from a Find query and the entry from a Browse List. The format of the highlighting is defined using html ^span^ and ^/span^ coding. This is set in the two environment parameters listed above. For example, using the alephe/www_f_eng/exlibris.css cascading style sheet to set the text to be dark blue and bold. The value for .text3 in exlibris.css is shown below:

```
.text3 {
  font-family:'Arial Unicode MS', Arial, Helvetica, sans-serif;
  color:#212063;
  font-weight:bold;
  font-size:100%;
}
```

Highlighting can be deactivated by defining a non-html prefix and suffix:

setenv mark_match_words_prefix "<x>"
setenv mark_match_words_suffix "</x>"

You can turn off the highlighting of particular words by listing the words in xxx01/tab/tab06.

setenv create_statistics Y
Allows Z34 records to be used for statistical analysis of Web server use. This parameter overrides the default that is set in aleph/proc/www_server; if set to Y the counter “last-z34-sequence” should be defined in the z52 table using UTIL G/2.

setenv set_word_limit 1500
This parameter limits the number of words that will be collected when truncation is used (e.g. find “a?” will retrieve all words beginning with “a”). If the find limit exists, this is the number of z97 (Word dictionary) record numbers (i.e. distinct words) in a given search. The maximum value for word_limit is 9999.

setenv set_prox_limit 100
Not used if aleph_start has ADJACENCY_TYPE 2

setenv server_default_charset "iso-8859-1"
If the Web server detects that the Web OPAC browser is not utf-8 enabled (i.e. is not Netscape 6+ or Microsoft Internet Explorer 5+) the utf-8 parameter in the html files is neutralized, and the data is sent back from the server in a standard character set. This line defines the character set to use.

setenv www_user_z36_sort_routine 00
setenv www_user_z36_sort_order A
setenv www_user_z37_sort_routine 00
setenv www_user_z37_sort_order A
setenv www_user_z38_sort_routine 00
setenv www_user_z38_sort_order A
These parameters allow you to configure the hold/photo/loan sort order in the Web OPAC with the following choices for sort routines:

**z36 (Loans):**
00 = z36-due-date
01 = z36-sub-library z36-status z30-collection z36-due-date

**z37 (Holds):**
00 = z37-priority z37-request-date z37-open-date z37-open-hour
01 = z30-sub-library z30-item-status z30-collection z37-open-date z37-open-hour
02 = z30-sub-library z30-item-status z30-collection z37-status z37-open-date z37-open-hour

**z38 (Photocopy):**
00 = z38-open-date

The choices for the sort order are “A” for ascending and “D” for descending.

setenv www_short_max_no_locations "10"
This parameter defines the maximum number of locations to display in the Brief View Table. If there are more locations than what you specify here, then there will be an indication that there are more locations. The total number of characters for this display is 2000.
Web Profiles

The Web Patron Profile List window provides a way to provide different default options for a patron as they are searching the Web OPAC. Profiles are defined in the Circulation Module, accessible via the icon. To assign a specific profile to a patron, create this profile in the Circulation Module.

Next you will want to enter the name of this profile in the Global Patron Information form also located in the Circulation Module:

You can define a default user profile for Web OPAC users. If no profile is defined for a user, then the ALEPH profile will be used. Every individual who accesses the Web OPAC is assigned a user profile. The user profile sets default preferences for display, language, database and home library.

To define a profile for a certain IP address – the name of the profile should be the IP address of the machine. A range of IP addresses can also be entered (minimum of 6 characters):

<table>
<thead>
<tr>
<th>IP Address</th>
<th>ALEPH Profile name</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.1.1.54</td>
<td>010001001054</td>
</tr>
<tr>
<td>10.1.1.*</td>
<td>010001001</td>
</tr>
</tbody>
</table>

The following list describes the options that can be specified for each profile. The example below refers to the CR (Course Reserves) profile:
The following briefly describes the fields of the 1. General Information tab of the Patron Profile Information form.

**Profile ID:** the name of the profile (e.g., “ALEPH”). This can be an IP address.

**Base Name:** defines the default database or library the patron should use when searching (for example, USM_PUB or USM01).

**ADM Library:** defines which Administrative library the user belongs to (e.g., USM50 when using USM_PUB or USM01 as the Base Name.)

**Sublibrary:** defines which sub-library’s items should display first when viewing holdings, if any (for example, UEDUC).

**Brief Format:** defines the default format that should be used for the Brief View. The Brief View (“000” value) is available in two format types, a table format and a list format. The list format (“999”) displays like the Full View, but with fewer fields displayed and more records appearing on one screen.

If you want the table format to display, enter “000” (three zeroes). Refer to the Setting up a Brief View Table section of this document, the System Librarian Guide and/or the “How to Set up a Brief View Table in Web OPAC” document for information on setting up a Brief View Table.
If you want the list format to display, enter one of the “9##” default options from the right-arrow expand. Additional Brief View List formats may be added in xxx01/tab/www_f_tab_short_999 file as required. See the Web OPAC section of the System Librarian’s guide for more information.

Max Save/Mail Files: defines the maximum files that a user can save or mail. The default is 9999999.

Interface Lang.: default is English

Auto Full: you can decide that you want the system to display the Full View immediately, without the intermediate step of the Brief View. If you enter the number 5, the Full View will display if a query results in five records or less.

Records Per Page: defines the number of Brief View records that will display on one screen. You can go to the next set of 20 records by clicking the “Next Page” button.

Permissions:

Link Permission: defines whether or not the user can click on external 856 links. This is an all or nothing link – a user can click on all links or none at all.

Save Permission: defines whether or not the user is permitted to save a list of records to the server. The file will be saved in alephe/scratch, and can be retrieved by a staff member creating course reserves lists.

Course Permission: defines whether or not the user has access to course reserves. The course reserve Module allows patrons (normally faculty) to create a list of records for a course, if desired by the library.

SDI Permission: defines whether or not the user has the ability to create his/her own SDI profile.

Special Request Permission: defines whether or not the user can make a special request.

Update Address Permission: defines whether or not the user is allowed to update his/her address.

OPAC List of Files
All web files for version 18 are located in $alephe_root/www_f_eng. There is also a shortcut to get to this directory:

At the Unix command line prompt>> type “wf”
The “Screen shots and file names for WWW OPAC files in version 18” document will help you to identify the files for your Web pages. Many times, multiple files are used to create one screen, often using the <include> tag.

Another way to find out which file is used is to view the source (e.g. from Internet Explorer© View→Source) of the web document where there will often be comments explaining the makeup of the page. For example, the HTML shown below demonstrates that the Basic Search page of the Web OPAC is using file find-b:

```html
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN" "http://www.w3.org/TR/html4/loose.dtd">
<!-- filename: find-b -->
<html>
<head>
<title>Ex Libris University - Basic Search</title>
</head>
</html>
```

Also, from the $alephe_root/www_f_eng directory, you can use the following syntax to find what the file names are for files that contain specific text. Be sure to use the correct case. Enter the text you are searching for within quotes “ ” and be sure to include an asterisk * at the end, as in the example below:

```
>>grep "Please identify yourself" *
```

Using the example above would locate all files that contain the text “Please identify yourself” in the $alephe_root/www_f_eng directory. The potential file names are login, login-request and login-session:

- login:<p class=title>Please identify yourself:
- login-request:<div class=title>Please identify yourself:
- login-session:<div class=title>Please identify yourself:

The graphics for all of the web pages in ALEPH are located in $alephe_root/www_f_eng/icon/. To use different graphics for existing images, simply copy your new graphic so it has the same filename. If you wish to insert new images, for example a school banner, simply place the image in the icon directory and refer to it on the web pages using the icon_f path:

```
<img src="&icon_path_&lng/icon/f_school_banner.gif">
```

Web OPAC Base

alephe/tab/tab_base.lng
<table>
<thead>
<tr>
<th>!</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
</tr>
</thead>
<tbody>
<tr>
<td>USM01PUB</td>
<td>Ex Libris University USM01 USM01</td>
<td>USM01 N alldocumen ts not (wst=suppressed or wst=deleted or wst=circ-created)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USM_SER</td>
<td>USM Serials Catalog SER USM01 USM01 USM01 Y WTP=Serial</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USM_HUM</td>
<td>USM Lincoln &amp; Uptown USM01 USM01 USM01 Y wsl-xlinc or wsl-xuptn or wsl-xeduc or wsl-xmusi</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USM_SCI</td>
<td>USM Science &amp; Health USM01 USM01 USM01 Y wsl=xsci or wsl=xsci o r wsl=xhlth or wsl=xelec</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USM_LINC</td>
<td>USM Lincoln Library LINC USM01 USM01 USM01 Y WSL=XLINC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USM_LAW</td>
<td>USM Law Library LAW USM01 USM01 USM01 Y WSL=XLAW</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USM_EDUC</td>
<td>USM Educ Library EDUC USM01 USM01 USM01 Y WSL=XEDUC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USM_ELEC</td>
<td>USM Electr Resources ELEC USM01 USM01 USM01 Y WSL=XELEC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>USM30_2</td>
<td>EXL Crs Rsv Summer USM30 USM30 USM30 USM30 N wpe=Summer not (wpe=NA or wst=deleted)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The bases defined in tab_base.lng are those that are available through the Web OPAC. Columns 4, 5 and 6 indicate the extensions that are used when searching the base. For example, when searching USM01PUB, the public database, use the filename extension – USM01 first, and if that isn’t found, use –USM01, and if that isn’t found, use the unsuffixed file. In this example, the system would use find-b-USM01, find-b-USM01 or find-b for the opening page in the order listed here.

Column 1 indicates the code of the base (or virtual base). Bases can be created by limiting a logical base as defined in column 9. USM01PUB (column 1) contains all of the records in USM01 (column 7) except those that have been identified as suppressed or deleted in the cataloging record. “wst” is a three-letter code for an index as defined in ./xxx01/tab/tab00.lng. The logical base in column 7 must have already been defined separately in column 1.

You may also create bases that can be used for a pre-filtered search. For example, the base USM_LAW contains only those items from the XLAW sublibrary. Column 4 above indicates that you use files with extension –law first, then files with extension USM01. Column 9 is a Keyword search that limits documents to those in the sublibrary XLAW. “wsl” can be any three-letter code listed in tab00.lng. For more information, see the section on filtering later in this document. The System Librarian can define the databases/libraries that can be entered only after the OPAC user has logged in by including an * in column 2:

```
USM20  *  ExLibris ILL  USM20  USM20  USM20
```

**exlibris.css**

ALEPH incorporates advanced features of HTML, that enable you to change just one master file and thereby change all the display definitions (e.g. font, font weight, background etc.) in all the screens automatically. The exlibris.css (cascading style sheet) file is a master for styling, which is used for standard definitions for formatting web pages. exlibris.css "cascades" from general to specific and from top to bottom. For more information regarding how to use the exlibris.css files, refer to the System Librarian Guide.
Include Files

Include files are files which contain HTML code that can be included in other HTML files. They are used for common codes that are relevant to many HTML screens. They are defined once, in a separate master file. An "included file" can itself contain include commands.

Other applications of include files are javascript files and sub-library lists. Additionally, includes can be used to include files that may be common to many screens. For example, the following line is found in the file short-1-head

<include>short-include-buttons

The file short-include-buttons defines the display of the buttons and links found at the head of a brief view table.

Searches - Customization

There are six different types of searches available via the Web OPAC.

Search (find-b)
Browse (scan)
Multi-field (find-a)
Multi-base (find-m)
Common Command Language (find-c)
Advanced (find-d)

The Browse and Search (keyword) screens have similar elements as they are all made up of a combination of a number of HTML files. Using the ‘include’ command combines the HTML files.

The pull-down menus that display in the Browse and Search (keyword) screens are defined by a number of files.

Browse Search (Scan)

The scan-include-2 (HTML) file, located in the alephe/www_f_ing directory provides the codes in the pull-down menu for the Browse (Scan) screen:

```html
<td class=td2
    valign=top>
    <select name=scan_code>
        <option value=TIT $$5000-S"TIT">Title</option>
        <option value=TTL $$5000-S"TTL">Main Title</option>
        <option value=AUT $$5000-S"AUT">Author</option>
        <option value=SUB $$5000-S"SUB">Subject</option>
        <option value=SYS $$5000-S"SYS">System number</option>
        <option value=SRS $$5000-S"SRS">Series</option>
        <option value=LOC $$5000-S"LOC">Location</option>
        <option value=ISSN $$5000-S"ISSN">ISSN</option>
    </Select>
</td>
```
In the above example, the three letter code following "value=" is the three letter code for the index to search, defined in tab00.lng. Tab00.lng is located in the $data_tab directory of the bib library (USM01/tab/tab00.lng) or can be accessed via UTIL G/1/00. In this example, the codes below the break are actually "word" (search / keyword) codes to add additional possibilities. However, they will display in a “Scan” heading list. The choice of indexes to be searched is entirely up to your Library.

The $$$5000-S is a type of variable for this particular file that remembers the type of scan code that the patron used in his search. For example, if the user chooses the “Author” option from the Browse screen, the $$$5000-S"AUT" portion of the line causes the system to recall the “Author” option when (s)he comes back to the Browse screen again.

Keep in mind that this $$$5000-S variable is not consistent across types of searches. For example, the Advanced keyword search, find-d, uses a variable to store the search strategy between searches, but uses $0200 to store the index name.

Basic Keyword Search (find-b)
The Basic keyword search allows you to submit one Search string, one Keyword index to search, and the Adjacency operator.

The Search string is defined in the find-b HTML file as seen immediately below:

```html
<td class="td2">
  <input size=40 name="request" value="$0100">
</td>
```

The Keyword index codes are now stored in an HTML file called, find-code-include, as shown in the example below. This find-code-include is also used in find-d (Advanced). If you do not want to use the exact same index codes for all of these search screens, then just replace the “<include>find-code-include” in your find-b or find-d HTML with the desired indexes, similar to the example in the previous “Browse Search (Scan)” section in this document.

```html
<!-- filename: find-code-include -->
<select name=find_code>
  <option value=WRD $$$5000-S"WRD">All Fields</option>
</select>
```
The Adjacency operators are defined in the

```
</tr>
<tr>
<td class="td2">
Words adjacent?
</td>
<td class="td2">
<input Type="radio" name="adjacent" $1000-C"N" value="N"> No
<input type="radio" name="adjacent" $1000-C"Y" value="Y"> Yes
</td>
</tr>
```

The search options ("All fields", "Title", etc) are simply text and can be changed or translated. Also, the order of the index codes in the HTML file determines the order in the drop down list on the web page. You can change the order and add as many Keyword indexes as you like. However, these indexes must be defined in tab00.lng as a word index (W-nnn) with the specific fields defined in tab11_word.

**Multi-field Search (find-a)**

The Multi-field search expands on the basic search and allows for searching multiple fields at one time. The ability to search the subject field and the author field is defined by the following lines of HTML:

```
<table border=0 cellspacing=2 width="90%">
<tr>
<th class="td2" align=left width=10% nowrap>Subject</th>
<td class="td2">
<input type="hidden" size=13 name=find_code value="/WSU" />
<input size=35 name=request value="$/0100">
</td>
</tr>
<tr>
<th class="td2" align=left>Author</th>
<td class="td2">
<input type="hidden" size=3 name=request_op value="AND">
<input type="hidden" size=6 name=find_code value="/WAU" />
<input size=35 name=request value="$/0200">
</td>
</tr>
```

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The index that will be searched is the "W-subject" index (from tab00.lng), indicated by value="WSU" and the "W-author" index (from tab00.lng), indicated by value=WAU. The codes for the indexes used in the screen must be ones that are defined in tab00.lng (UTIL G/1/00).

In the example above, the Boolean "AND" operator is hidden and not modifiable by the patron. Each Boolean operator is assigned a unique name. In the example above, the name is "request_op". Again, the "request_op" is hidden but the system librarian can let the patron choose his/her Boolean operator providing a radio button option similar to the example below:

```html
<td class=td1 align=left>
  <input TYPE="radio" NAME="request_op" VALUE="AND" checked> AND
  <input TYPE="radio" NAME="request_op" VALUE="OR"> OR
  <input TYPE="radio" NAME="request_op" VALUE="NOT"> NOT &nbsp
</td>
```

**Multi-base (find-m)**

Multi-base searching allows the user to search multiple databases at one time. This is most useful when the system librarian has defined Z39.50 databases (see section later in this document on Z39.50 configuration). The only options that can be specified in multi-base searching are the field (index) to search, the input strings, and the bases.

The lines in the HTML find-m file that provide the ability to insert a text string for searching are shown as `request` and `$0100`:

```html
<td class=td2 nowrap>
  Type word or phrase
</td>
<td class=td2>
  <input size=40 name="request" value="$0100">
</td>
```

The lines in the HTML find-m file that provide the field (index) to search are shown as `find_code` and `value=WRD $0200`:

```html
<tr>
  <td class=td2 width=15% valign=top nowrap>Field to search</td>
  <td class=td2>
    <select name="find_code">
      <option value=WRD $$0200-S"WRD">All Fields</option>
      <option value=WTI $$0200-S"WTI">Title</option>
      <option value=WAU $$0200-S"WAU">Author</option>
      <option value=WSU $$0200-S"WSU">Subject</option>
      <option value=ISSN $$0200-S"ISSN">ISSN</option>
      <option value=SYS $$0200-S"SYS">System number</option>
      <option value=BAR $$0200-S"BAR">Barcode</option>
    </select>
  </td>
</tr>
```
The lines in the HTML find-m file that provide the bases to search are shown as checkbox and name=BASE (along with the appropriate database or virtual base name) immediately below. These lines would be repeated for each additional database / base that you want to provide. These databases can also be Z39.50 databases, but all must be defined in tab_base.lng in $alephe_tab.

With the above lines in place, you will be able to search the ALEPH databases USM01 and USM01 plus any Z39.50 database defined in tab_base.lng.

**Advanced Keyword (find-d)**

Advanced Keyword (find-d) searching is similar to Multi-field (find-a) searching, except for three things. Firstly, in Advanced Keyword (find-d) searching, the OPAC user can choose three index fields for searching. Secondly, in Advanced Keyword (find-d) searching, the OPAC user is shown the results of each search and is given the option to modify the search or look at any of his result sets, including the combined search. Thirdly, the OPAC user is provided with a selection of “filters” to add to the search. These filters are provided by the HTML included file called “find-include-filter”. Similar to find-a, the Boolean “and” operator is a hidden value and cannot be changed by the OPAC user.

**Common Command Language searching (find-c)**

The Common Command Language (CCL) search contains only one option for the patron to specify – the ccl_term. The OPAC user can use any of the codes defined in tab00.lng for ccl searches. Web developers may use another method (such as javascript behind the scenes) to construct find-c search strings, and send the search string to the server for parsing.

Since version 14.2, adjacency searching has been added to the Common Command Language search. Now, instead of constructing the search as follows:

```
CCL_Term=history %1 england &ADJACENT=Y
```

The option to select word adjacency is available to the end user from the search screen.
Viewing Results

Brief View Table
A combination of four files defines the **Brief View Table**. The four files define the columns that are included plus the information in the columns:

- `www_tab_short.lng`
- `tab_sort`
- `short-a-head`
- `short-a-body`

The `www_tab_short.lng` table, which is found in the `$data_tab` directory (xxx01/tab), defines the **columns** and identifies the **sorting routine**. The sorting routine used for each column is defined in `tab_sort`, which is also in `$data_tab` (xxx01/tab) directory.

The HTML files responsible for displaying the columns are `short-a-head` (headers) and `short-a-body` (actual information), both of which are located in the `www_f_eng` directory. The only way to get to the full view of the record is by clicking on the number to the left of each entry in the table. This is not customizable.

Setting Up a Brief View Table
The short display of bibliographic information in table format will be the default in the Web OPAC when:

- The user chooses Brief View-Table format from the OPAC Preferences screen; or
- The library has “000” set as the default display format in the Patron Profile defined in the Circulation Module (as described in the previous section called “Web Profiles”).

In order to set up a brief view table, follow these steps:

**Step 1** To determine which format will be the default display; enter “000” in the **Brief Format** field in the **Profile Information** window in the Circulation Module. Refer to the **Web Profiles** section of this document.

**Step 2** To define the number of Brief records that will display on one screen, enter the desired number in the **Records Per Page** field in the **Profile Information** window in the Circulation Module. Refer to the **Web Profiles** section of this document. If you enter 20, the OPAC user will see 20 entries per page when viewing results.

**Step 3** To determine which fields will display in the table/Brief View format; edit `www_tab_short.lng` (where .lng indicates the correct variable for the language for the interface) in UTIL I/4 (see `www_tab_short.lng` section below.)
www_tab_short.lng
The **www_tab_short.lng** table defines which bibliographic information will display in the columns of the short display in table (brief view) format in Web OPAC. The www_tab_short.lng table is located in the $data_tab (xxx01/tab) directory or can be found by using UTIL I/4.

The order of the columns defined in **www_tab_short.lng** determines the order of the display, in conjunction with the short-a-head and short-a-body HTML files in www_f_eng. These HTML files should have placeholders in sequential order, and should have as many placeholders (beginning with 0300 as the first placeholder) as the number of columns defined in the www_tab_short.lng table. The first two placeholders in the HTML files are used for the underlined number/link to the full record and for the checkbox for adding to the “My e-Shelf”.

The field you define for a column can be dependent on the bibliographic record format (FMT). You can also set up alternative definitions by assigning them the same identifying number in column 1 of this table.

### Example:

1 L Author               02---A01---A 00 00 0100 S 9 -          BK 1#### 700##
1                                         SE 7####
1                                         ## 1#### 700##

In the above example the “Author” column in the Web OPAC will be taken from the fields 1#### or 700## if the document is a book, from field 7#### if the document is a journal, and from field 1#### or 700## in any other instance. You can set a single column to display more than one field of information, by repeating the column number in Col. 1, entering the name of the field in Col. 3, and entering the field code in Col. 12:

<table>
<thead>
<tr>
<th></th>
<th>2 L Title                  03---A01---A 00 00 0100 S</th>
<th>BK 245## 240##</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>## 245## 240##</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>L Type                    S</td>
<td></td>
</tr>
<tr>
<td></td>
<td>## TYP##</td>
<td></td>
</tr>
</tbody>
</table>

The “Title” column (2) contains two fields – the **Title** field and the **TYP** field. It creates a virtual field TYP indicating the type of record – (Electronic Resource, Web Resource, Map, Kit, etc.), based on coding in LDR (pos. 06, 07), 006 (pos. 00), 007 (pos. 00, 01) and 008 (pos. 23) fields. You can use the TYP field for indexing and display, depending on the setup of tab_expand. The second column name “TYP” will *not* display.

**Short-a-head and short-a-body**

**Short-a-head** and **short-a-body**, together with **www_tab_short.lng**, determine the order in which columns display in the **Brief View Table**. **Short-a-head** and **short-a-body** are HTML files located in the alephe/www_f_eng directory. These files should have placeholders in sequential order, and should have as many placeholders (starting from 0300) as the number of columns defined in the www_tab_short.lng table. In the following example of www_tab_short.lng, there are four columns defined for the **Brief View**: 

---

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The `short-a-head` file defines the display of the headers according to `www_tab_short.lng`. The example of `short-a-head` that corresponds to the `www_tab_short.lng` above is shown below. Remember that the following placeholders are used for column captions, except for 0100 and 0200. 0100 is a placeholder for a number link to full record display, and 0200 is a placeholder for a checkbox. The other placeholder numbers relate to `www_tab_short.lng`, where 0300 is the first column (Author) defined in `www_tab_short.lng`, 0400 is the second column defined, and so on.

```html
<!-- filename: short-table-body-head -->
<tr class=tr1>
  <th class=col1>$0100</th>
  <th class=col1>$0200</th>
  <th class=col1>$0300</th>
  <th class=col1>$0400</th>
  <th class=col1>$0500</th>
  <th class=col1>$0600</th>
</tr>
```

The `short-a-body` HTML file defines the display of the content of each column. It should have the exact number of lines/placeholders as `short-a-head`. See the example below, which corresponds correctly to the example of the `short-a-head` above.

```html
<tr valign=baseline>
  <td class=td1 id=centered width="1%">$0100</td>
  <td class=td1 id=centered width="1%">$0200</td>
  <td class=td1 $2300 width="15%">$0300</td>
  <td class=td1 $2400 width="8%">$0400</td>
  <td class=td1 $2500 width="30%">$0500</td>
  <td class=td1 $2600 width="5%">$0600</td>
</tr>
```

If you wish to remove a column e.g. the “Year” column, you must delete it from `www_tab_short.lng` and decrease the number placeholders in `short-a-head` and `short-a-body` by one. The column headers here must match with the corresponding contents columns defined in short-a-body and must have the same order. In our examples, the definitions refer to the following column headings:

```
  1 L Author 0300
```

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If you want to add another column e.g. "Collection", follow these steps:

**Step 1:**
Add a line number, 5, and a new parameter to `www_tab_short.lng`, (located in the xxx01/tab directory).

**Step 2:**
Add the same new parameter to alephe/www_f_eng/short-a-head:

```
<th class=col1>$0700</th>
```

**Step 3:**
Add the same parameter to alephe/www_f_eng directory/short-a-body:

```
<td class=td1 $2700 width="5">$0700</td>
```

**Brief View List**
The Brief format field in the Patron Profile (Circulation Module) defines what is included in the Brief View List. Create the various views in `.xxx01/tab/ www_f_tab_short_999` and then set up the drop down menu options in `.xxx50/tab/pc_tab_exp_field.lng` with the internal command PROFILE-SHORT-FORMAT. How these MARC fields appear is defined in

**Full Views**
Full View displays are determined by the combination of the files, `edit_doc_999.lng` (which MARC fields display) and `edit_field.lng` (which subfields display).
Full View Layout

The Full Views of a Record in the Web OPAC consist of three areas:

1. Full View Header, constructed from `full-set-head` (& included files)
2. Full View Body, may take different forms depending on the format.
3. Full View Footer, constructed from `full-set-tail` (& included files)

Areas 1 and 3 are constructed only from html files, whereas area 2 is constructed from a combination of html files and ALEPH tables. The following section specifies the files involved in creating the various full view formats: Standard, Catalog card, Citation, Name tags, and MARC tags.

Full View Body Formats
The following section focuses on possible formats that display in area 2 from the section **Full View Layout**.

Standard Format
The Standard Format displays a customized set of MARC and ALEPH tags for a record:
<table>
<thead>
<tr>
<th>Record format</th>
<th>&lt;Blank&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>035</td>
<td>©30762007.49972</td>
</tr>
<tr>
<td>035</td>
<td>©00003963</td>
</tr>
</tbody>
</table>

**Author**  
Henry, Alexander, 1755-1814

**Title**  
The journal of Alexander Henry the Younger, 1799-1814, edited with an introduction by Barry M. Dough.  

**Imprint**  

**Descr.**  
2 v. : ill., maps, ports. ; 25 cm.  

**Series**  
(Publications of the Champlain Society ; 56-57)

---

### Library Info
- Archives General PC12.C4 v. 56, etc. By Consultation

### Library Info
- Lincoln Library General PC12.C4 v. 56, etc. Regular Loan

### Holdings
- All Items

### Gen. note
- Limited ed. of 1250 copies (p. verso, v. 2)  
- Includes index (v. 2)

### Bibliogr.
- Includes bibliographical references.

### Contents
- v. 1: Red River and the journey to the Missouri -- v. 2: Saskatchewan and Columbia River.

### Local Note
- Copy no. 01146 (copy in Dept. of Rare Books)

### Per Sub.
- Henry, Alexander, 1755-1814

### Cor Sub.
- North West Company

### Subject
- Indians of North America
- Northwest, Canadian -- Description and travel.
- Northwest, Pacific -- Description and travel

### Add Entry
- Dough, Barry M.

### Series Add Entry
- Publications of the Champlain Society ; v. 56-57

### ISBN
- 05974245 (v. 1)  
- 05974245 (v. 2)

### Sys no.
- 00003579

---

This page is generated from three files:

1. **www_f_eng/full-999-body** – This html file merely establishes the columns for the web page and provides codes to link the display data to the ALEPH table which controls the fields which display.

2. **xxx01/tab/edit_doc_999.lng** – This ALEPH table lists the tags from the complete MARC record that will actually display in the standard view. There are several details to be aware of with this table:
   
   a. The order in which the tags are listed in this table is the order in which the tags display in the Web OPAC.
   
   b. This file can be base specific, similar to html files. To do so, add a `<base extension>` to the file name, e.g. **edit_doc_999.lng.xlinc**
   
   c. The description of the tag in col. 8 is the description that appears in the left column of the OPAC.
d. Using col. 10, you can determine which fields only display in the OPAC (W), the GUI (G), or both (blank). Because you may want a different display order in the Web OPAC than the GUI, it is recommended to create a section for each in this table. This way you are explicitly stating which tags appear where and have certain properties.

e. In order to make certain fields link to appropriate data, you need to code that tag with a Link Type, in col. 10. These are the Web OPAC link types and their definitions:
   - **Z - Link to Services** (points to tab_service)
   - **A - External Link** Unlike “M”, “A” uses cols 3 and 4 in edit_doc_999. It used the EXT line in edit-field for field formatting.
   - **L - Links from LOC/PST line to items display**
   - **M - Electronic resource link** Unlike “A”, “M” does not use edit_doc_999 columns 3 and 4 to filter records by subfield. Instead it has its own table (“tab_buf_z304”) which does this formatting.
   - **Q - Links (BIB to BIB and AUT to AUT links)** for UP, DN, PAR, and Z103 links.

3. **xxx01/tab/edit_field.lng** – This ALEPH table determines the format in which a specific field will display. It allows you to strip or only include certain subfields and to determine the display order of subfields. Column 4 of **edit_field.lng** contains a code that links to the code in col. 6 of **edit_doc_999.lng**.

**Name Tags and MARC tags Formats**
The Name Tags and MARC tags formats display all of the fields in the MARC record, the first with the Names of the tags and the second with the actual Codes and subfields.

The primary customization one can make to these formats is to change the column structure using the html page **www_f_eng/full-000-body**.

In order to edit the name of a tag in the Name Tag format, change the field name in col. 9 of **xxx01/tab/tab01.lng**.
### Name Tag Format:

<table>
<thead>
<tr>
<th>Format</th>
<th>BK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leader</td>
<td>01:40:mem 2200349 4500</td>
</tr>
<tr>
<td>Fixed-Length Field</td>
<td>891025m1981i92onebei b 001 0deng d</td>
</tr>
<tr>
<td>ISBN</td>
<td>0695942000 (v.1)</td>
</tr>
<tr>
<td>ISBN</td>
<td>069594219 (v.2)</td>
</tr>
<tr>
<td>System Control No.</td>
<td>C:ACTUOC051946972</td>
</tr>
<tr>
<td>System Control No.</td>
<td>A1N0505</td>
</tr>
<tr>
<td>Geographic Area Code</td>
<td>--</td>
</tr>
<tr>
<td>Time Period of Cont</td>
<td>v1v2</td>
</tr>
<tr>
<td>LC Call No.</td>
<td>F980 C453 S8</td>
</tr>
<tr>
<td>LC Call No.</td>
<td>F015 C4 v.56</td>
</tr>
<tr>
<td>Local LC Type Call</td>
<td>F015SCAv.56, etc. RE #v. 56 ; IM. #v. 56 v.1</td>
</tr>
<tr>
<td>ME Personal Name</td>
<td>Henry, Alexander, 1769-1814</td>
</tr>
<tr>
<td>Title</td>
<td>The journal of Alexander Henry the Younger, 1799-1814 / edited with an introduction by Barry M. Gough.</td>
</tr>
<tr>
<td>Phys. Descr.</td>
<td>2 v. : ill., plates, ports. ; 25 cm.</td>
</tr>
<tr>
<td>Series Statement</td>
<td>(Publications of the Champlain Society ; v. 56-57)</td>
</tr>
<tr>
<td>General Note</td>
<td>Limited ed. of 1250 copies (t.p. verso, v. 2)</td>
</tr>
<tr>
<td>Bibliography Note</td>
<td>Includes bibliographical references.</td>
</tr>
<tr>
<td>General Note</td>
<td>Includes index (v. 2)</td>
</tr>
<tr>
<td>Formatted Contents Note</td>
<td>v. 1. Red River and the journey to the Missouri -- v. 2. Saskatchewan and Columbia Rivers.</td>
</tr>
<tr>
<td>Local Note</td>
<td>Copy no. 01126 (copy in Dept. of Rare Books)</td>
</tr>
<tr>
<td>Subject Name</td>
<td>Henry, Alexander, 1769-1814</td>
</tr>
<tr>
<td>Subject Corporate</td>
<td>North West Company</td>
</tr>
</tbody>
</table>

### MARC Tag Format:

<table>
<thead>
<tr>
<th>FMT</th>
<th>BK</th>
</tr>
</thead>
<tbody>
<tr>
<td>LDR</td>
<td>01:40:mem 2200349 4500</td>
</tr>
<tr>
<td>008</td>
<td>891025m1981i92onebei b 001 0deng d</td>
</tr>
<tr>
<td>020</td>
<td>a 0695942000 (v.1)</td>
</tr>
<tr>
<td>030</td>
<td>a 069594219 (v.2)</td>
</tr>
<tr>
<td>035</td>
<td>a C:ACTUOC051946972</td>
</tr>
<tr>
<td>0359</td>
<td>a A1N0505</td>
</tr>
<tr>
<td>043</td>
<td>a r-c---</td>
</tr>
<tr>
<td>045</td>
<td>a v1v2</td>
</tr>
<tr>
<td>050 4</td>
<td>a F980 h. C453 S8</td>
</tr>
<tr>
<td>050 4</td>
<td>a F015 b. C4 v.56</td>
</tr>
<tr>
<td>0900</td>
<td>a F015SCAv.56, etc. RE #v. 56 ; 1. RE #v. 56 ; 1</td>
</tr>
<tr>
<td>1001</td>
<td>a Henry, Alexander,</td>
</tr>
<tr>
<td>24514</td>
<td>a The journal of Alexander Henry the Younger, 1799-1814 / edited with an introduction by Barry M. Gough.</td>
</tr>
<tr>
<td>300</td>
<td>a 2 v. : ill., plates, ports ; 25 cm.</td>
</tr>
<tr>
<td>4901</td>
<td>a Publications of the Champlain Society ; v. 56-57</td>
</tr>
<tr>
<td>500</td>
<td>a Limited ed. of 1250 copies (t.p. verso, v. 2)</td>
</tr>
<tr>
<td>504</td>
<td>a Includes bibliographical references.</td>
</tr>
<tr>
<td>500</td>
<td>a Includes index (v. 2)</td>
</tr>
<tr>
<td>5050</td>
<td>a v. 1. Red River and the journey to the Missouri -- v. 2. Saskatchewan and Columbia Rivers.</td>
</tr>
<tr>
<td>5090</td>
<td>a Copy no. 01126 (copy in Dept. of Rare Books)</td>
</tr>
<tr>
<td>60010</td>
<td>a Henry, Alexander,</td>
</tr>
<tr>
<td>61020</td>
<td>a North West Company.</td>
</tr>
</tbody>
</table>
Catalog Card Format

The html page for the catalog card format simply defines that there are separate lines. In fact, this file is also used for the Citation format. The html page is /www_f_eng/full-xxx-body:

<table>
<thead>
<tr>
<th>System number [000006769]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Henry, Alexander, 1765-1814</td>
</tr>
<tr>
<td>The journal of Alexander Henry the Younger, 1799-1814 / edited with an introduction by Barry M. Gough.</td>
</tr>
<tr>
<td>2 v. ill., coats of arms, maps, ports ; 25 cm.</td>
</tr>
<tr>
<td>(Publications of the Champlain Society ; 56-57)</td>
</tr>
<tr>
<td>Limited ed. of 1250 copies (t.p. verso, v. 2)</td>
</tr>
<tr>
<td>Includes bibliographical references.</td>
</tr>
<tr>
<td>Includes index (v. 2)</td>
</tr>
<tr>
<td>v. 1. Red River and the journey to the Missouri -- v. 2. Saskatchewan and Columbia Rivers.</td>
</tr>
<tr>
<td>Copy no. 01126 (copy in Dept. of Rare Books)</td>
</tr>
</tbody>
</table>

Because the html page merely states that the body of the page contains lines, the actual customization is done using a special series of ALEPH tables that work in conjunction with one another. In order to work with this series of tables, you need a special format code; for the catalog card format, this code is 037. You can see this in the html link to the Catalog Card Format in /www_f_eng/full-set-head:

```html
<td class="text1">
  <a href=&server_f?func=full-set-set&set_number=$0800&set_entry=$0500&format=037>
    Catalog card</a>
</td>
```

The tables used to customize the display are, xxx01/tab/edit_doc.lng, xxx01/tab/edit_paragraph.lng, and xxx01/tab/edit_field.lng. The Catalog Card code 037 corresponds to a list of codes in xxx01/tab/edit_doc.lng. In turn, these codes refer to specific MARC and/or ALEPH tags in xxx01/tab/edit_paragraph.lng. Finally these MARC and/or ALEPH tags are edited for display using xxx01/tab/edit_field.lng (just as the tags were edited for the Standard Format in section 2.1).

For more information on the relationships between these files, please refer to the document "How to Change Bib Info Displays, Releases 12.2 and Higher".

Citation Format

The html page for the citation format simply defines that there are separate lines. In fact, this file is also used for the Catalog Card format. The html page is /www_f_eng/full-xxx-body.
Because the html page merely states that the body of the page contains lines, the actual customization is done using a special series ALEPH tables that work in conjunction with one another. In order to work with this series of tables, you need a special format code; for the citation format, this code is 040. You can see this in the html link to the Citation Format in /www_f_eng/full-set-head:

```
<td class="text1"> 
  <a href=&server_f?func=full-set-set&set_number=$0800&set_entry=$0500&format=040>
    Citation
  </a>
</td>
```

The tables used to customize the display are, xxx01/tab/edit_doc.lng, xxx01/tab/edit_paragraph.lng, and xxx01/tab/edit_field.lng. The Citation code 040 corresponds to a list of codes in xxx01/tab/edit_doc.lng. In turn, these codes refer to specific MARC and/or ALEPH tags in xxx01/tab/edit_paragraph.lng. Finally these MARC and/or ALEPH tags are edited for display using xxx01/tab/edit_field.lng (just as the tags were edited for the Standard Format in section 2.1).

For more information on the relationships between these files, please refer to the document "How to Change Bib Info Displays, Releases and Higher".

**Modifying Result Sets**

**Sort**

As stated above (in the section www_server.conf), the default sort for result sets is pre-defined. The OPAC user can, however, re-sort the results by clicking on the column headings of the brief view table. The order of sort for each column and whether a column can be used for sorting is determined by column 3 in the file www_tab_short.lng in the xxx01/tab directory. The sort order is determined by tab_sort.

Additional sort options can be provided for the OPAC user in the www_f_sort_heading.lng table found in xxx01/tab directory.

**Filtering**

Filtering is performed on a set after the search has been completed. There are predefined filters, defined by find-include-filter, short-filter, short-filter-r, short-filter-a, short-filter-y and short-filter-s. Also, the system librarian can create filters by using the find-c (CCL_TERM) search and including the existing set in the search. For example, to limit a set by sub-library, enter the following lines of code in the file short-filter:
Any three-letter index term can be used to filter, as long as it is defined in tab00.lng. WSL is defined as indexing by sub-library. SET=$0100 includes the current set in the search.

**How to Setup Bases and Filters**

Rather than retrieving all the records in a particular physical database (USM01, USM01, etc.) you may want to limit/filter the records retrieved to those in a particular location, in a particular format, in a particular language, etc. Such limiting may be either a pre-filter or a post-filter. With a pre-filter, the user selects a particular catalog before starting the search; with a post-filter, the user takes the results of the search then selects a location, format, etc., by which to limit them.

**Post-Filters**

With a post-filter, the user takes the results of the search and selects a location, format, etc., by which to limit them.

Post-filters are set up using the alephe/www_f_ing/short-filter. (For English, this is the www_f_eng/short-filter).

**Location as Post-Filter**

For example, you might have *locations* as post-filters as shown in this short-filter:

```html
<tr bgcolor="#eeeeee">
  <td colspan=2>
    <div class="text3">
      Limit by location
    </div>
  </td>
</tr>
<form>
  <div class="text4">
    McGill University Libraries
  </div>
  <br>
  <select name="variable name">
    <option>
      Birks Religious Studies Reading Room
    </option>
    <option>
      Blackader-Lauterman Architecture and Art
    </option>
    .........
  </select>
</form>
```

The index code you use will depend on the indexes you’ve defined in tab00.lng and tab11_word, tab11_acc, tab11_ind.
Formats as Post-Filters

Or, you might have formats as post-filters as shown in this short-filter.

```html
<form>
<div class="text4">
Electronic Resource
<br>
<select name="variable name">
<option>Computer File
<option value="&server_opac/find-c?CCL_TERM=SET=$0100^and^wtp=Computer^File" target="error"> Computer File
<option value="&server_opac/find-c?CCL_TERM=SET=$0100^and^wtp=Digital^Map" target="error"> Digital Map
<option>- - - - - - - - -
<option value="&server_opac/find-c?CCL_TERM=SET=$0100^and^wtp=Electronic^Journal" target="error"> Electronic Journal
...<etc.>
...<etc.>
</form>
</div>
<br>
<form>
Material Type
<br>
<select name="variable name">
<option>Archives
<option value="&server_opac/find-c?CCL_TERM=SET=$0100^and^wtp=Archive" target="error"> Archive
<option value="&server_opac/find-c?CCL_TERM=SET=$0100^and^wtp=Graphic" target="error"> Graphic
<option value="&server_opac/find-c?CCL_TERM=SET=$0100^and^wtp=Kit" target="error"> Kit
<option>- - - - - - - - - - - - - - - -
<option value="&server_opac/find-c?CCL_TERM=SET=$0100^and^wtp=Map" target="error"> Map
...<etc.>
</form>

The index code (WFT vs. WTP) you use will depend on the indexes you’ve defined in tab00.lng and tab11_word, tab11_ind, tab11_acc.

Language as Post-Filter

Or, you might have languages as post-filters as shown in this short-filter.
<form>
  <div class="text4">
    Language
  </div>
  <br/>
  <select name="variable name">
    <option>
      Arabic
    </option>
    <option value="&server_opac/find-c?CCL_TERM=SET=$0100^and^wln=ara" target="error">
      Arabic
    </option>
    <option value="&server_opac/find-c?CCL_TERM=SET=$0100^and^wln=chi" target="error">
      Chinese
    </option>
    <option value="&server_opac/find-c?CCL_TERM=SET=$0100^and^wln=cze" target="error">
      Czech
    </option>
  </select>

Other Post-Filters
The alephe/www_f_eng/short_filter comes with some built-in filters using CCL search:

  <li><a href="&server_f?func=short-filter-a&start_date=&DATE-D007">New records</a>
New records</li>

Pre-Filters (Catalogs)
With a pre-filter, the user selects a particular catalog before starting the search.

The alephe/tab/tab_base.lng (UTIL Y.3) is used to specify pre-filtering. For more information see the section above called Web OPAC Base. Any keyword/Boolean search, which can be performed through the Find/Search function, can be the basis of a catalog. The filtering criteria are specified in column 7 of the tab_base.lng entry. Additional information on tab_base.lng can be found in the ALEPH Configuration Guide.

Here’s what the tab_base.lng entry for a physical database looks like:

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>USM01</td>
<td>USMARC Demo Lib(01)</td>
<td>USM01</td>
<td>USM01</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In this example, Column 8 is empty, that is, no filtering criteria are specified. Note that the xxx01 entries (that is, the entries for physical databases) must always have column 7 empty.

Excluding Suppressed, Deleted Records
Almost all sites will want to have the catalog(s), which the public use, exclude suppressed records, logically-deleted records, and possibly substandard, “fast-cat” records. This is accomplished with a specification like this:

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>USMCAT</td>
<td>ExLibris University</td>
<td>USM01</td>
<td>USM01</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ot (wst=suppressed or wst=deleted or wst=circ-created)
“wst” is an index or “heading code” which is specified in xxx01/tab/tab00.lng as an index on the STA field:

11 W STA## B1 WRD WST

(The STA field looks like this: “STA $$aSUPPRESSED”; “STA $$aDELETED; etc., and is found in the bibliographic record.)

Bases apply only to Words and Browse searches. Direct index (number) searches are always done on the entire bibliographic file. You may want to remove or change the tag of OCLC numbers or other overlay-matching numbers if records are being logically deleted.

**Locations as Pre-Filters**

The `tab_base.lng` entries for catalogs that are filtered by sub-library might look like this:

```
| 1  | 2  | 3  | 4  | 5  | 6  | 7 |
+----+----+----+----+----+----+----|
| LAW| Law| USM01| USM01| wcs=law| not (wst=suppressed|
| or wst=deleted or wst=reserve) |
```

What you specify for the code will depend on what indexes you have defined in `tab11_word`, `tab11_ind`, `tab11_acc`. If you have defined a single WCL index with both the sub-library and collection then you can use that:

```
11 W LOC## bc B1 A WCL
```

If you have defined separate sub-library and collection indexes:

```
11 W LOC## bc B1 WSC
11 W LOC## b B1 WSL
11 W LOC## c B1 WCL
```

then you can use the WSC and/or WSL.

If none of your collection codes are used as sub-library codes, then you should only need to define the single WSC (or WCL) index with LOC (or PST) subfields b and c.

You might have the idea of specifying “USMCAT” in column 6, that is, having LAW be a catalog built on USMCAT rather than USM01, thus making it unnecessary to repeat the USMCAT filtering criteria. You cannot do this. The value in column 6 must be a physical library; it cannot be just another base.
Formats for Pre-Filters

The tab_base.lng entries for catalogs, which are filtered by format, might look like this (using the wft index, built on the FMT field):

```
!         1                   2             3     4     5     6              7
!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!-!!!!!-!!!!!-!!!!!-!!!!!-!!!!!!!!!!!!! <etc.>
SERIALS     Serial          USM01          USM01 wft=SE
```

Or like this (using the wtp index, built on the TYP field):

```
!         1                   2             3     4     5     6              7
!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!-!!!!!-!!!!!-!!!!!-!!!!!-!!!!!!!!!!!!! <etc.>
MCGILL_SERIALS Journal Titles MGUS1 MGUS1 (wtp=electronic journal or wtp=serial or wtp=web journal or wtp=microform serial) not (wst=suppressed or wst=deleted or wst=reserve)
```

The FMT field is a physical field which is stored in the bib record. The TYP field is a virtual field generated by tab_type_config.eng. It uses the LDR pos. 06,07; 006 field pos. 00; 007 field pos. 00, 01; and 008 pos. 23 to arrive at more detailed formats than those specified in the FMT field. To index on it you need to have a

```
WORD       expand_doc_type    tab_type_config
```

entry in the xxx01/tab/tab_expand. For more information on the tab_type_config.eng, consult the ALEPH Configuration Guide.
Display of Bibliographic Information

Library staff can control the fields and order of the full view of the bibliographic record by modifying the files edit_doc_999.lng and edit_field.lng. For example, the following **Full View**:

```
The lines for Author, Title and Imprint are determined by the following lines in edit_doc_999.lng:

```
Since there are no 240, 249 or 250 fields in the MARC record for this item, they do not display. The letter “D” in the fifth column of this display.

The letter “D” in the 6th column determines which display type to use when displaying the subfields, as specified below in edit_field.lng:

```
1 L 1#### H -e246 # A ^
1 L 1#### D -e246 # A ^
1 L 1#### 9 -e246 # A ^
1 L 1#### S -e246 a q
1 L 2401# 3 [    ]
1 L 245## D # A ^
1 L 245## 9 a h
1 L 245## H B -c a h n p
```

There are other types of displays for the MARC fields. Type S is for the brief view table (see the file www_short_table.lng), and type L is for reports. Note that for the Author (1##) type S, only subfields a and q display, as specified by the lines below:

```
1 L 1#### S -e246 a q
```

The display of the title in the full view (Type D) is determined by the following lines:

```
1 L 245## D # A ^
```

Line 2 indicates that all subfields will display (#) in the order listed in the catalog record (A), and put a space between each field (^).

There are many other types of displays, but these are used by other functions as described in other documentation.

The file edit_paragraph.lng is used to determine how blocks of data display. The most prominent place this is used in the Web OPAC is the Holdings Display screen.
Holdings Screens

The following lines from edit_paragraph.lng determine the bibliographic information at the top of the screen:

```
!   BIB for list of holdings
012 1#### D ^:^  
012 245## D .  
012 260## W ^ .  
012 300## D ^ .  
```

These lines use the symbol “D” or “W” which links the MARC tag to the display of subfields in edit_field.lng.

While you are able to rearrange the order and/or remove the columns of this screen, you cannot specify new columns or data elements. The files are item-global-*, located in the www_f_eng directory. Refer to the System Librarian Guide for more information on how to customize the Holdings screen.
The retrieval and display of bibliographic information from the BIB library is defined by the 012 format in edit_doc.lng in the xxx01 library’s tab directory. Edit_doc.lng is used to define the display of document information. It defines a concatenation of a number of paragraphs. It is used in conjunction with edit_field.lng (UTIL I/1) and edit_paragraph.lng (UTIL I/2). The retrieval and display of holdings information is defined by the 012 format in edit_doc.lng in the xxx60 library’s tab directory. You can also use the 856 tag to add a link to an external file or program relevant to the bibliographic record. The link may be to any machine that is served by an http daemon.

To include an 856 field in list format, ensure that the following settings appear:
In xxx60/tab/tab_expand:

```
WEB-FULL   expand_doc_hol_bib
WEB-FULL   expand_doc_856
```

In xxx60/tab/edit_paragraph.lng, define 856 with “m” in col. 10 and define 856 in tab_buf_z403.

**How to Add a New Index**

Decide which type of index you want: Direct Index, Words (Find), or Headings (Browse).

**Add Indexes to tab00.lng**

Look at xxx01/tab/tab00.lng and decide on a 3-letter code for the new index. Make sure the code isn’t already in use.

Although the code can be up to 5 characters, by convention, 3 characters are used. For a Direct index, specify “IND” for the index type. For a Headings index, specify “ACC” for the index type. For a Words index, find the next “W-nnn” value and use that for the index type. Consult the Database Management Guide (UTIL G/1/00) for other parameters:

```
! 2     3   4 5  6  7 8  9 10  11
1=!!!!!!!!1-!!!1-1-1=-!1=-1-!!!!=1-!!!!-!!!!=-!!!!!!!!!!!!!!!!!!!!H ATH   ACC  1 A  00  0015 ATH
Authors

H WAU W-003 B1 00  0023 WAU W-authors
```

**Add Indexes to tab11_ind, tab11_acc, or tab11_word**

Include the code you have specified in tab00.lng in the entry for each field in the corresponding xxx01/tab/tab11* which you want to have sent to this index.

If you specified “IND” in tab00, put the entry in tab11_ind. If you specified “ACC”, put it in tab11_acc, and if you specified “W-nnn”, put it in tab11_word. Consult the **ALEPH Configuration Guide** for other parameters.
Run the Index Job
For a Direct index, run p_manage_05. For a Headings index, run p_manage_02, and for a Words index, run p_manage_01.

On large databases these indexes take a number of hours to run - the larger the database the longer it will take to run the index.

Add Indexes to pc_tab_sear.lng
If you want the index to be searchable through the GUI OPAC client, then add it to xxx01/tab/pc_tab_sear.lng. For a Headings index, include it in the “SC” (Scan) section. For a Words index, include it in the “FI” (Find) section. For a Direct index, include it in the “IN” section.

Add it to pc_tab_find.lng or pc_tab_scan.lng
If you want a Words index to be searchable in the ILL module then add it to pc_tab_find.lng.

If you want a Headings index to be searchable in the ILL module, then add it to pc_tab_scan.lng.

A Direct index can be added to either the mini-find or the mini-scan.

Add it to the Web Include files
If you want the index to be searchable on the Web, it has to be added to a couple of html files. For Headings index, add it to the www_f_eng/scan-include-2-xxx01:

```html
<select name=scan_code>
<option value=TIT $$5000-S"TIT">Title</option>
<option value=TTL $$5000-S"TTL">Main Title</option>
<option value=AUTH $$5000-S"AUTH">Author</option>
<option value=SUB $$5000-S"SUB">Subject</option>
<option value=SYS $$5000-S"SYS">System number</option>
<option value=SRS $$5000-S"SRS">Series</option>
<option value=LOC $$5000-S"LOC">Location</option>
<option value=ISSN $$5000-S"ISSN">ISSN</option>
<option value=WYR $$5000-S"WYR">Word index</option>
</select>
```

For a Words index, add it to the www_f_eng/find-code-include-xxx01:

Example:

```html
<select name=find_code>
<option value=WYR $$0200-S"WYR">All Fields</option>
<option value=WTI $$0200-S"WTI">Title</option>
<option value=WAU $$0200-S"WAU">Author</option>
```
My e-Shelf

After performing a search, from the results list or the full view of a record, patrons can select items to add to My e-Shelf. My e-Shelf can then be emailed, printed or saved.

The e-shelf is made up of the following files:
- myshelf-clear-basket
- myshelf-course
- myshelf-delete-folder
- myshelf-folder-list
- myshelf-folder-list-body-no-doc
- myshelf-folder-left-body-1
- myshelf-folder-left-body-2
- myshelf-folder-left-body-3
- myshelf-folder-left-body-no-folder
- myshelf-folder-left-head
- myshelf-folder-left-tail
- myshelf-folder-right-body-1
- myshelf-folder-right-head
- myshelf-folder-right-tail
- myshelf-full-head
- myshelf-full-tail
- myshelf-mail
- myshelf-no-doc-basket
- myshelf-no-fol-for-delete
- myshelf-note-full
- myshelf-note-short
- myshelf-refresh-page
- myshelf-save-as-fol
- myshelf-short-body
- myshelf-short-folder-list
- myshelf-short-head
- myshelf-short-head-2
- myshelf-short-head-2-no-course
- myshelf-short-select-include
The information that displays in My e-Shelf is hard coded and you are unable to add to it, however you may suppress information and change the order in which it displays. The www_tab_myshelf_short table (/tab/USR00, in the demo libraries) defines which information will be displayed in the columns of the short display in My e-shelf.

The order of the columns defined in this table determines the order of the display, in conjunction with the myshelf-short-head, myshelf-short-head-2, myshelf-short-head-2-no-course and myshelf-short-body HTML files in the www_f_eng directory.

**Patron Functions (Including no-bor)**

Patrons can log into the Web OPAC with their Patron ID and/or barcode. The Patron ID/PIN, barcode/Verification-1 and alternate-id/Verification-2 are used in tandem – they are not interchangeable, that is, you can’t use Patron ID/Ver-1 to log in. Whether or not the patron can use the Patron ID, borrower, or alternate ID to log into the web is defined in tab_user_id.lng in the data_tab of the usr00 library (e.g. USR00/tab/tab_user_id.lng). Patrons have the following functions (if allowed by the library’s policies):

1. Change personal information such as address, PIN, etc.
2. Renew books they have checked out
3. Place a Hold or Recall on a book that is checked out or on the shelf
4. Place an ILL request for an item at another library (using Z39.50 searching)
5. Modify their personal profile – which databases to search, how the brief view will display, which sublibrary to default to for item display
6. Create a SDI (Selective Dissemination of Information) profile that allows patrons to have searches automatically performed and emailed at regular intervals.

Most of the above functions can be removed by simply removing the appropriate link from the file www_f_eng/bor-info. Regulations about whether or not a user can place a hold on a book are described in Circulation Training.

**User Login & Patron Directory Services**

Patron Directory Services (PDS) facilitates a single sign-on for the suite of Ex Libris products (ALEPH, MetaLib, SFX, and DigiTool).

PDS use in the WEB OPAC login is optional and can only be implemented in a shared user environment, meaning that PDS cannot be implemented for a library whose tab100 “USER-Sharing” is set to “N”. PDS is configured in the ADM library’s tab100, in

```
./alephe/aleph_start and in ./alephe/www_server.conf
```

```
tab100:
PDS-AWARE
```

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Version 18
Updated: June 9, 2006
Values: Y N Default: N
Y = use the PDS for user authentication in the Web Interface

PDS-Key-Type

Defines the key type (Z308-key-Type) against which the ID is verified

**aleph_start example:**

```bash
setenv PDS_HOST raml
setenv PDS_PORT 8997
```

**www_server.conf example:**

```bash
setenv server_pds "http://@_HOST_PDS:@HTTPD_PDS_PORT/pds"
setenv pds_backlink http://@_HOST_WWW:@HTTPD_PORT/F/&session
```

Another example:

```bash
setenv server_pds "http://ram11:8997/pds"
setenv pds_backlink "http://ram11:8997/F/&session"
```

**My Library Card**

**Due Hour in Loan List**

You may add the due hour in the patron’s library card loan-list by changing the following line in the `bor-loan-exp` HTML file from:

```html
<td class=td1 align=left>$0300</td>
```

to:

```html
<td class=td1 align=left>$0300 at $1600</td>
```

**Back Button in “Details” View**

A Back button can be added to pages that display full details of a single loan or request (“expand” pages.) The button can be applied to the following pages:

- `bor-history-loan-exp-1`
- `bor-hold-exp`
- `bor-ill-exp`
- `bor-ill-exp-ext`
- `bor-item-schedule-exp`
- `bor-loan-exp`
- `bor-photo-exp`

To display the button in any of the pages mentioned above, insert the following before the copyrights section:
The “Back” button provided by the Web browser may be used to provide this functionality as well.

Display of Hold Request Notes
Hold Request notes can be displayed in the patron’s hold request list of My Library Card by adding the following lines to `bor-hold-head`:

```html
<th class="text3">Note 1</th>
<th class="text3">Note 2</th>
```

These lines should be added where the other columns of the hold request list are listed.

In `bor-head-body`, add the following lines:

```html
<td class=td1 valign=top>$1400</td>
<td class=td1 valign=top>$1500</td>
```

Setting Up SDI
The SDI (Selective dissemination of Information) menu allows patrons with SDI permission to define SDI profiles for themselves, based on their areas of interest. Patrons can access and modify their SDI profiles from the patron information screen of My Library Card by clicking on the SDI profile link. SDI profiles are stored in a special Oracle table, Z325, which is located in the USR00 library. SDI takes the item records into account in order to determine whether or not a bibliographic record should be included in an SDI list. This allows for both the item’s processing status and location to be taken into account and prevents items that have been created for Acquisition purposes and are not yet in the library collection from being included in the SDI retrieval.

You may add the Refine button to a SDI query by including the following lines in the `/alephe/www._f_eng/bor-sdi-head` file:

```html
<td align="center" nowrap>
| &nbsp; |&nbsp;
</td>
<td align='center' nowrap>
<input type="image" 
name="action_refine"
src="&icon_path/f-refine.gif"
src="&icon_path/f-refine.gif"
```
Email Addresses for Feedback

A library can choose which address feedback messages from Web OPAC are sent. There are two options:

- An address can be taken from a new parameter in www_feedback_email_address
  
  \[
  \text{setenv www_feedback_email_address}
  \]

- If not defined in www_server.conf, the address can be taken from the HTML page. To define the address on the page, customize /alephe/ww_f_eng/feedback. Enter the line marked in bold into the existing page:

\[
<\text{form name=form1 method=post action="&server_f" onSubmit="my_replace (document.form1.text)";}>\\n<\text{input type=hidden name=func value=feedback}>\\n<\text{input type=hidden name=file_name value=find-b}>\\n<\text{input type="hidden" siz=50 name="EMAIL" value="Please fill here the library email address"}>\\n
<\text{div class=text3}>\\n  \text{Your constructive feedback is greatly appreciated.}\\n<\text{/div}>\\n
\text{For example:}\\n<\text{input type="hidden" size=50 name="EMAIL" value= ilana@exl.edu"}>

Z39.50 setup

Z39.50 Gate

The Z39.50 gate provides a means to connect to other databases – for example, if you want to connect to the Library of Congress, you would set up a z39.50 gate on your server.

There are two methods to configure your z39.50 gate as shown below. The first method requires that you create a new configuration file, while the second method allows you to utilize a previously defined target as a template using the \text{Util N/1} menu. Both methods require the following pre-requisites:

- Z39 hostname;
- Port;
- Database name; and
- Attributes of the target

\text{Note that this information should be published by the target, for example Aberdeen’s info is at}
Configure New z39.50 Gate
The following example demonstrates the steps necessary to configure the z39.50 gate from scratch and is connecting to Aberdeen University (Scotland):

**General Configuration**

1. Define the remote z39.50 servers
   a. Define a unique name (ABRD)
   b. Get their IP address and port number (139.133.7.78, Port 9991)
   c. Get their database name (ABN01)
   d. Get username/password if it’s required for login
   e. Add the following lines to `alephe/tab/z39_gate/z39_gate.conf`

   ```
   # Aberdeen University (Scotland)
   <include>z39_gate_ABRD.conf
   ```

   f. Create the file `alephe/tab/z39_gate/z39_gate_ABRD.conf` like this:
   (‘#’ is a comment)

   ```
   # Z39.50 target for Aberdeen University
   target ABRD
   hostname 139.133.7.78
   database ABN01
   nosets
   recordtype USMARC
   find WRD  u=1016  t=l,r,b  s=pw  Bib-1,c=1
   find AUT  u=1  t=l,r,b  s=pw
   find WAU  u=1  t=l,r,b  s=pw  c=1
   find WTI  u=4  r=o  t=l,r,b  s=pw  c=1
   find TIT  u=4  t=100  s=1
   find WSU  u=21  t=l,r,b  s=pw  c=1
   find SUB  u=21  t=l,r,b  s=pw
   find SYS  u=12
   find ISSN u=8
   find ISBN u=7
   find WYR u=31  r=o
   scan AUT u=1
   ```

You may use Util N/1/1 to copy a previously defined target (i.e. Oxford) and use it as a template for creating a new one. Use of Util N/1/1 replaces steps e. and f.
scan TIT u=4
scan SUB u=21

sort 01 u=31
sort 03 Bib-1,u=4
sort 02 u=1

###########################################################
Use record type USMARC if you are searching a bibliographic database. Leave 'nosets' blank to allow the gateway and server to negotiate a set.

g. To the directory $alephe_root/gate/ -- add the file abrd.conf. You may use a previously defined configuration file (i.e. Oxford.conf) as a template for creating this one:

# Aberdeen Z39.50 access from USM
## GENRAL PAR
local-base ABRD
local-base-name ABN01
local-short-name ABRD
target-base MIT
access-method Z39
record-type USMARC
fix-routine
charconv
sid 001

## INPUT TRANSFORMATION
# Find from screen
find WRD u=WRD r=B
find WTI u=WTI r=B
find WSU u=WSU r=B
find WAU u=WAU r=B

# Find from scan list
find AUT u=WAU r=B s=ab
find TIT u=WTI r=B s=ab
find SUB u=WSU r=B s=ab
# Find from doc
find 1#### u=WAU r=B s=ab
find 2#### u=WTI r=B s=a
find 6#### u=WSU r=B

# Scan from screen
scan AUT   u=AUT r=B
scan TIT   u=TIT r=B
scan SUB   u=SUB r=B

# Scan from doc
scan 1#### u=AUT r=B s=ab
scan 2#### u=TIT r=B s=a
scan 6#### u=SUB r=B s=a

###########################################################
## WEB PAR
###########################################################
web-accessmethod
web-address http://library.abrd.org/opac.html (not real!)

2. Map ALEPH search codes to Z39.50 search codes
   a. For example, the client submits a search using WTI (aleph) search code. The use attribute for title is 4.
   b. U = use attribute
   c. T = truncation attribute
   d. S = structure attribute
   e. C = completeness attribute
   f. For more info see http://lcweb.loc.gov/z3950/agency/

3. Define the remote z39.50 server as an ALEPH base
   a. in $alephe_tab/tab_base.lng:

   !*-----------------------------------------------
   !* External bases
   !*-----------------------------------------------
   ABRD       ABERDEEN (Z39.50) EXT01 EXT01

   Column 2 will show up on the top of the screen when the user is searching. Columns 3, 4 and 5 are the extension to use in www_f_eng Column 6 should always say Z3901 for the Z39.50 databases.

4. Start the Z39.50 Gate
a. manually using Util/W/3
b. automatically by configuring aleph_start

FOR THE WEB

5. Test the Z39.50 Gate before configuring in the web client
   a. Util N/3/3
   b. For z39_server, use the yaz_client, with Util N/3/4.
   c. You may of course, test other types of searches.

6. Configure the Web files
   a. To enable the Z39.50 base to be selected from the database list, add the following to $alephe_root/www_f_eng/base-list:

   ```html
   <tr>
     <td class=text3 colspan=2>
       <img src="&icon_path/f-small-dot.gif" border="0" alt="">
       <a href="&server_f?func=find-b-0&local_base=ABRD">
         ABERDEEN (Z39.50)
       </a>
     </td>
   </tr>
   ```

   b. To enable the Z39.50 base to be selected from the Multi-base search, add the following to $alephe_root/www_f_eng/find-m-include-2:

   ```html
   <td class=text9 nowrap>
     <input type="checkbox" name=FXX value="ABRD">
     $0100-C"ABRD"> Aberdeen University Library
   </td>
   ```

   Other steps are required to make it available in other screens of the Web OPAC. Please refer to the Web OPAC Customization documentation for more information.

FOR THE GUI

7. To define it as a library with which the GUI may work, add the following line to C:\AL500\ALEPHCOM\TAB\LIBRARY.INI:

   ```ini
   Z39 - USMARC EXT01 <your_server's_hostname_or_IP>:<your_pc_server_port>
   ```

8. To make it available as a searchable database in the Staff Search (drop-down menu) add the following line to C:\AL500\ALEPHCOM\TAB\SEARBASE.DAT:

   ```ini
   Aberdeen University ABRD EXT01
   ```
Searching Z39.50 Databases from the ALEPH Web OPAC

There are two ways to search a Z39.50 database in the web: first, you could add it to Multi-base (find-m) search screen. In order for all databases to show up in the search history, the Z3901 library must be included in the set library of your bibliographic library, as explained in the section earlier on searching find-m. Second, adding it to the base-list file makes it available for searches on its own (i.e., not associated to other libraries, as happens in the find-m screen). Also, to access the library directly (not through the base-list), use the URL http://www.yourserver.edu:4545/ALEPH/-/start/ABRD. ABRD is the example from above – use the code you used in tab_base.lng for other Z39.50 databases.

Should you care to have users log in to their home administrative library while they are searching a Z39.50 database (for example to make an ILL request), you must set up an administrative relation in the $alephe_tab/library_relation table:

ADM Z3901 USM50

So that the Z3901 library knows to use the USM50 Administrative library when a patron is searching it.

Z39.50 Server

The Z39.50 server provides a means for external users to connect to your database – for example, students at an other university can do a Z39.50 search of your database. The Aleph Z39.50 server allows external clients to keyword search all indexes, browse local indexes, expand retrieved records and print/save records.

1. Map Z39.50 search codes to ALEPH search codes (per library)
   a. Add the following lines to the file alephe/tab/z39_server/z39_server.conf

   # ORN base defined below
   <include> z39_server_ ORN01.conf

   b. Configure in $alephe_tab/z39_server/z39_server_ ORN01.conf:

   # Aleph Z39.50 base profile
   #
   #w    Aleph    Use-value
   word  wrd    1016
   word  wrd    1017
   word  wau    1
   word  wau    1003
   word  wau    1004
   word  wti    4
   word  wsu    21
   word  wyr    30
   word  wyr    31
2. Define the output format for records
   a. Configure in alephe/tab/z39_server/z39_server_base:

   ![table]
<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>! 1 2 3 4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>USM01 1 2709</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAB01 1 MAB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>USM01 1 2709</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   If there is no entry in this table for a library, the records will display in ISO 2709 format (standard for North American Libraries).

3. Set up usernames/passwords for external access
   a. Configured via the privileges option in the Administration client.
   b. To enable access by specific ALEPH users, set the ‘Z39.5 users’ function for the appropriate libraries.
   c. To allow public access without having to supply authorization, create the username/password Z39/Z39 enabling only the ‘z39.50’ function for the appropriate libraries.

4. Define the back-end PC server and port number that the Z39.50 server talks to
   a. The Z39.50 server listens for requests from external Z39.50 clients, and on receiving one, converts the Z39.50 query into Aleph syntax. It then sends the converted request to its PC Server, which queries the Aleph database, retrieves results, then sends the results (in Aleph syntax) back to the Aleph z39.50 server. The Aleph data is then converted into Z39.50 syntax and reported back to the external client.
   b. Configure z39_server.conf (UTIL N/6)

   hostname localhost:9908
Note: in most cases you can leave this as it is – hostname is your local server.

5. Start the z39.50 and PC Servers
   a. Start the back end PC server using UTIL W, remembering to use the same port number as used in Z39_server.conf.
   b. Start the Z39.50 server, taking default port.
   c. Or, automatically have the servers start by inserting in aleph_start.

6. Publicize the connection information – provide them with
   a. Server name (your library’s web server address)
   b. port number (for the Z39.50 server, not the back-end PC server)
   c. database name (in this case, USM01)
   d. username/password (if not z39/z39).

7. Testing
   a. To test, you need a Z39.50 client. YAZ, a simple text-based client, is provided with ALEPH for testing purposes. Follow the steps below. Your actions are represented in bold type; the remainder lines are server’s reactions. The example uses the USM01 database.

   UTIL N/3/4 : Check Target (yaz_client)
   YAZ client
   
   ------------
   Z> open tcp:localhost:<port_your_Z39_server_is_using> (find which one it is from UTIL W/1/1)
   Z> open tcp:localhost:<port_being_used_by_your_Z39_server>
   Connecting...Ok.
   Sent initrequest.
   Connection accepted by target.
   ID : 81
   Name : GFS/YAZ / Aleph Server
   Version: YAZ 1.9.1 / ALEPH 16
   Options: search present delSet scan sort extendedServices namedResultSets
   Elapsed: 0.180101
   Z> base USM01
   Z> find @attr 1=1 smith
   Sent searchRequest.
   Received SearchResponse.
   Search was a success.
   Number of hits: 182, setno 1
   records returned: 0
   Elapsed: 0.207372
   Z> quit
b. Q – How do I know which port my Z39 server is using?
   A – From UTIL W/1/1

c. Q – What’s the meaning of find @attr 1=1 smith ?
   A – It’s Z39 syntax for what in ALEPH would be find WAU=smith (i.e., a
   keyword search for “smith” in the “words from authors” index)

d. Q – Why weren’t any records displayed?
   A – Because display is a separate Z39 request (called “present” in Z39 lingo).

Tables Used in Web OPAC Customization

General - Table Extensions
You may now use different tables for Web OPAC and GUI OPAC by using the file
extensions: [filename].PC and [filename].WWW Example: tab_sub_library.lng.PC or
tab_sub_library.lng.WWW.

Library Tables
Please see the Web OPAC section of the System Librarian’s Guide for a complete list of
tables used with Web OPAC customization. Below is a short list of the most often used:

1. edit_doc.lng is used to define the display of document information. It defines a
   concatenation of a number of paragraphs. It is used in conjunction with edit_field.lng
   (UTIL I/1) and edit_paragraph.lng.

2. edit_doc_999.lng defines the fields to be included in a display of a bibliographic
   record. It defines the full format for printing and saving in GUI and Web. This display
   includes hypertext linking. This format allows for hypertext BROWSE and FIND links to
   Authority and Word lists as defined in tab11_acc, tab11_word, and tab11_ind of the
   tab directory of the library.

3. edit_doc_999_aut_xxx10.lng displays the definitions of AUT records for cross-
   reference display. In the Web OPAC, clicking on a reference allows for the display of
   the linked Authority Record. The display of the record is defined in the
   edit_doc_999_aut_xxx10.lng table. If this table does not exist, or has been defined
   incorrectly, the system will display information as defined in the table edit_doc_999.lng
   of the relevant AUT library.

4. edit_field.lng defines the display of a tag. It is used in conjunction with
   edit_paragraph.lng and edit_doc.lng If a tag is not defined in edit_field.lng, it will
   display as is. Therefore, tags entered in the database, without punctuation, need to be
defined here. You can define up to 10 filters for each sub-field per tag name.
5. **edit_paragraph.lng** defines the display of a paragraph of data from the bibliographic record. The edit_paragraph table defines a concatenation of a number of fields. It is used in conjunction with edit_field.lng and edit_doc.lng

Note that formats 001-099 are used by the BIB_FORMAT program for direct display of specific BIB information (e.g. on User List of Loans, OPAC List of Items etc.).

6. **tab00.lng** defines the system index files. There should be one such table for each language defined.

7. **tab01.lng** defines per language the type and name of the library and tag definitions for the bibliographic records.

8. **tab11_acc, tab11_ind, tab11_word** define the connection between the document record fields and the Word, Access and Index tables (including the groups or subfields within the Word table). Using these tables, the system builds a word/access/index record for the field (or subfield) defined.

9. **tab_sort** defines fields for sorting. This table is used in conjunction with:
   - pc_tab_sear.lng (UTILITY L/3/a) (option SO)
   - option-sort HTML screen (for Web OPAC)
   - www_server.conf (UTILITY J/6)
   - pc_server_defaults (UTILITY J/5)
   - tab00.lng - Access file codes and names (UTILITY G/1/00) (for correct filing of z101 sort keys).

10. **www_f_sort_heading.lng** -- The brief display of bibliographic data in the Web OPAC allows for sorting of the different display elements as defined in www_tab_short (UTILITY I/4). www_f_sort_heading.lng defines the sort options.

11. **www_tab_short.lng** defines the short display of bibliographic data in the WWW. The short display of bibliographic information in table format will be the default in the on-line Web OPAC when:

    "option-display-table" is chosen (From the Preferences screen, option display format, option brief view in table); **OR**
    If the library has "000" set as the default display format in the web profile (specified in the GUI Admin).

12. **tab05.lng** defines the captions for links between records, using sub-fields $$r (MARC tag that defines the reason for the link), $$n (title of the up link) and $$m (title of the down link) of the LKR field. tab05 is located in the library's data_tab directory and is set in UTILITY G/1/05.
alephe Tables (found in $alephe_tab)

13. **library_relation** defines the connections between libraries.

Special Note: If changes are made to the table, the servers must be reactivated in order to have the changes reflected in the clients.

14. Also found in **data_tab** directory of each library
**path_convert** re-directs files and tables. Every library has its own set of tables and files that can be maintained separately. However, it is possible for libraries to share the same table by re-direction in the path_convert tables. For example, if two libraries want to use the same Web screens, form, and tab directories. Note that it is now possible to define general web directories under alephe.

15. **tab_base.lng** defines the logical and physical databases that can be accessed by the user. Logical bases are defined by setting a FIND command that serves as a pre-filter or scope. In order to set a logical base to include everything EXCEPT a group of records, use "all" to define "everything", together with "not". e.g. all not wsp=suppressed table format.

16. **tab_z30_sort** defines items (z30 sort types) in various ALEPH functions. It is located in the library's data_tab directory and edited using UTIL G/4/c.

**Troubleshooting Techniques**

**Starting Your Own “Personal Server”**

From the command line, type

```
$ www_server 4444 stdout
```

A single web server will be started on port 4444 or any number you choose, but keep it in the 4000 range so you won’t interfere with other ports that might be running. To use that server, point your web browser to http://www.yourserver.edu:4444/F. The server log will display on your screen (specified by “stdout”). This is helpful when you need to stop and restart the server often, you can simply use Ctrl-C to stop the server then enter the command again to restart it, instead of using UTIL/W.

**Use of File Extensions**

We strongly recommend that you use file extensions (defined in conjunction with the Web OPAC base in tab_base, page 7) instead of modifying the files without extensions. That way, you will always have an original copy of the file in case you need to go back and troubleshoot.
Also, using file extensions lets you troubleshoot in a hidden environment if you choose. For example, you could define an extraneous base, called USMTST, which is really just a copy of USM01, and use the extension EXTST (must be five characters). Then, to access the EXTST pages, specify the specific web base in your web address using this syntax:

http://yourserver:port/F?func=file&file_name=find-b&local_base=extst

Another advantage of using file extensions is that it allows you to create a different looking OPAC for each branch of a multi-branch system. To do this add the extension for each branch to the html files as described above and then be sure to make the necessary changes to tab_base as described on page 7. You may have files with extensions that look similar to the ones listed below:

- start-1-nobor-ash01
- start-1-nobor-USM01
- start-1-nobor-USM30
- start-1-nobor-USM98
- start-1-nobor-USM99

Modifying Web Pages in ALEPH Administration Client

The ALEPHADM client is an ALEPH program that allows you to update UNIX server files via a graphical interface that is accessible from Start>ALEPH500>ALEPH Administration. Although a standard installation will already have access to ALEPH tables configured, you must follow the steps below to make webfiles accessible within the client.

1. Add the files you want to make available to /exlibris/aleph/u18_2/alephe/tab/tab_alephadm.eng

   e.g.:
   
   www_f_eng         find-b               N L Search page (find-b)

   NOTE - the above means "add from the www_f_eng directory a page called find-b that does not have a language extension (N), that is in the Latin alphabet (L), and that will display in the Tables Navigator as "Search page (find-b)"

2. Stop and start the PC server (from version 18 it can be done from any GUI - Services | General | Restart servers (sys-01) NOTE - sys-01 also allows you to stop and start the pc_server

3. Open ALEPHADM - click on Tables | Tables Navigator - expand the ALEPH node - expand the www_f_eng node - highlight the web file you want to edit - click on the Check Out button

4. Make changes to the file
5. When you're done try to close the file window - you'll get a prompt asking you to if you want to save it - say yes

6. Then click on the Check In button (this will copy your file to the server)

**NOTES:**
A file or table remains locked for further edits according to the time period defined in pc_server_defaults, under file_lock_period (where the unit of definition is seconds). The period that was defined in the USM was silly - 9999 seconds.

The lock period defined above has to be at least 2 minutes higher than the warning timeout period defined in alephadm.ini, under WarningTimeOut (where the unit of definition is minutes).

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**Deciphering Placeholders in Web OPAC Files**

ALEPH uses placeholders (i.e. $0100) across Web OPAC files. The same placeholder can be used in different files and have different meanings. A method for discovering the meaning of the placeholders in a given file shown below:

**STEP 1)** create a file called placeholders in the www_f_eng directory of your server (for instance, /exlibris/aleph/u18_2/alephe/www_f_eng). The file should only have the following content:

```plaintext
100) $0100<br>
104) $0104<br>
200) $0200<br>
300) $0300<br>
400) $0400<br>
500) $0500<br>
600) $0600<br>
700) $0700<br>
800) $0800<br>
900) $0900<br>
1000) $1000<br>
1100) $1100<br>
1200) $1200<br>
1300) $1300<br>
1400) $1400<br>
1500) $1500<br>
1600) $1600<br>
1700) $1700<br>
1800) $1800<br>
1900) $1900<br>
2000) $2000<br>
2100) $2100<br>
2200) $2200<br>
2300) $2300<br>
```

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The numbers in the above list represent all the placeholders used in ALEPH Web OPAC screen files (i.e., the files in the www_f_eng directory). "$7000" is the syntax for the way a placeholder occurs in the file. "7000)" is a token for the placeholder.

STEP 2) add the following line to the file whose placeholders you need to discover:

```html
<include>placeholders
```

For example, say that you are customizing the Search Results page, below:
From the “List of Web OPAC files” document, you learn that a file called *short-include-2* is invoked in the display above.

You open *short-include-2* (below) and notice that it has placeholders (bolded) that you need to discover the meaning of:

```html
<!-- short-include-2 -->
<br>
<div class=text3 id=bold>
    Results for $0400; $1200
</div>
<div class=text3 id=bold nowrap>
    $2100&nbsp;$2200
</div>
<div class=text3 id=bold nowrap>
    Format options :
    <img src="&icon_path/f-small-dot.gif" alt="Set 951 format to set of records" border=0>
    <a href="&server_f?func=short-format&format=951">951</a>
    <img src="&icon_path/f-small-dot.gif" alt="Set 951 format to set of records" border=0>
    <a href="&server_f?func=short-format&format=952">952</a>
    <img src="&icon_path/f-small-dot.gif" alt="Set brief view-table format to set of records" border=0>
    <a href="&server_f?func=short-format&format=953">953</a>
```
<table border=0 width=100%>
<tr>
<td class=text3 id=bold width=20% nowrap>
Records $0100 - $0200 of $0300 (maximum display and sort is $4500 records)
</td>
<td class=text3 id=bold width=30%>
  &nbsp;
</td>
<td align=right valign=bottom nowrap>
<form method=get name=form_jumpText action=&server_f>
  <input type="hidden" name="func" value="short-jump-text">
  <input type=image name=action_short_jump_text src=&icon_path/f-find-text.gif alt="Jump to entry beginning with entered text" border=0>
  <input type=text size=5 maxlength=20 name="jump_text" value="">
</form>
</td>
<td align=right valign=bottom nowrap>
<form method=get name=form_jumpRecord action=&server_f>
  <input type="hidden" name="func" value="short-jump">
  <input type=image name=action_short_jump src=&icon_path/f-jump-to.gif alt="Jump to indicated document in list" border=0>
  <input type=text size=5 maxlength=5 name="jump" value="">
</form>
</td>
<td align=right nowrap>$0900 &nbsp; $1000</td>
</tr>
</table>
Open `short-include-2` and add the line:

```xml
<include>placeholders</include>
```

and add the line:

```xml
<include>placeholders</include>
```

to it. Save the file and quit. There is no need to restart the web server.

Now reload the Results page, or do a new search. This is what you will see:

![Results page screenshot](image)

Seeing the tokens next to their related data will help you understand the meaning of the placeholders in `short-include-2`:

- **100** – for the starting number of records displayed in the page (i.e., 1)
- **200** – for the total number of records that can be displayed in the page (i.e., 10)
- **300** – for the total number of records in the retrieved set (i.e., 14)
- **400** – for the search argument (i.e., “dogs” in the Words index)
- **900** – for the “previous page” icon
- **1000** – for the “next page” icon
- **1200** – for the default sort option
- **2100** and **2200** – for the remainder sort options
- **4500** – for the maximum number of records to sort and display

A token displayed without data (for example, 1400) is not used in `short-include-2`. 
After you are done, comment out the include line you added to *short-include-2*:

```xml
<!-- <include>placeholders -->
```

**Customizing Other Web Pages**

The following directories, located under `$alephe_root`, may be accessed by typing a shortcut at the command line: for example, use ‘wf’ to access `www_f_eng`, ‘ws’ to access `www_s_eng`, and so on. Included with this document are the list of files for `www_f_eng`, and `www_r_eng`.

The port, 8991, is the standard port for a single installation of ALEPH on a server.

`www_f_eng`, or (wf) The main web OPAC pages

http://www.yourserver.edu:4505/F

`www_f_eng/icon`
Contains the images for all web directories.

`www_r_eng`, or (wr) Course Reading pages
Accessible through the staff pages (www_s_eng)

`www_s_eng`, or (ws) ALEPH library staff menu

http://www.yourserver.edu:4505/S

`www_u_eng`, or (wu) Utilities menu
Accessible through the staff pages (www_s_eng)

`www_v_eng` MetaLib – Virtual Library Services
For future development