



USER DOCUMENTATION

XSL Creator

Ex Libris

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Overview of XSL Creator and ALEPH Templates

The screenshot shows the ALEPH Circulation software interface. The main window displays a 'Library Card' printout for John Smith. The printout includes the following information:

Ex Libris University Libraries
222 Aleph Causeway
Chicago, IL 60614
thechoice@exlibris.co.il
Tel# 773.404.5527

Smith, John
123 Main Street
New York,
New York
43123
(212) 246-2468
John_Smith@yahoo.com
Patron ID: 10

The printout also includes a section for 'Name', 'Home Library', 'ILL Library', and 'ILL Total Limit' with the following values:

Name: Smith, John
Home Library: ULINC
ILL Library: UEDUC
ILL Total Limit: 9999

The 'Patron Activity' sidebar on the left shows a list of fields with checkboxes. The following fields are checked:

- Name
- Home Library
- ILL Library
- ILL Total Limit
- ILL Active Limit

The 'XSL Creator' sidebar on the left shows a list of fields with checkboxes. The following fields are checked:

- Blank Line
- Name
- Home Library
- ILL Library
- ILL Total Limit
- ILL Active Limit

The 'Patron Activity' sidebar also shows a table of fields:

<input type="checkbox"/> Proxy For Id	z302-proxy-for-id	left	No
<input type="checkbox"/> Primary Id	z302-primary-id	left	No
<input type="checkbox"/> Name Key	z302-name-key	left	No

This is a customized *Library Card* that has been created using XSL Creator. Note that the Name, Home Library, ILL Library and ILL Total Limit check boxes (on the left) have been selected, and these fields appear in the printout (on the right).

CHAPTER 1

Introduction to XSL Creator

This document is intended primarily for staff users who want to customize ALEPH 500™ (ALEPH) print templates. We recommend that you first read the *Customizing Printouts (XML and XSL) – 16* document, available from the [Ex Libris Documentation Center](#) in order to understand the ALEPH printing mechanism, and the underlying structure of ALEPH templates.

What Is XSL Creator?

XSL Creator is an ALEPH GUI-based application that lets you customize templates without having to manually edit XSL. It is sophisticated, yet easy-to-use, and comes as part of your ALEPH installation.

In ALEPH, the printing mechanism is based on the XML (eXtensible Markup Language) and XSL (eXtensible Stylesheet Language) standards. ALEPH reports and letters are based on formatted XML/XSL templates, designed by the Ex Libris development team:

Since XSL Creator does not require detailed knowledge of XML or XSL, you can focus on content and formatting. As you do not have to manipulate or change lines of code manually, the margin for error is greatly increased. A **Preview** button is available to assist you in the customization process, and you can preview the print output repeatedly before printing the actual report or letter.

Depending on your library setup and user base, you can:

- Select the XML data fields to appear in a report or letter;
- Create text
- Choose the order of the fields to appear in a report or letter;
- Define the font style (for example, bold, italic, underline) for each field;
- Determine the overall printout style (for example, grid, freestyle, columnar).

Notes:

We recommend that you use XSL Creator for creating new templates or for major changes to templates, but not for minor changes.

You cannot edit existing templates – you can only create new templates using XSL Creator

ALEPH Templates

Templates are composed of different sections: Templates can vary in structure from simple structures, containing one or two sections, to much more complex and lengthy forms.

- Header section - These lines define how the header of the printout will look:

10/08/2004 acq-s-order-info-00
Order Information

The form date and code of the template are inserted by default, and the title can be customized.

- **Data Sections:**
 - section-1 – General information of the form. Appears immediately below the Header section. This section is not repeated.
 - section-2, section-3 and so on – Data sections. These sections can be repeated.
- **Signature** – This section comes at the end of the printout:

Sincerely, Acquisitions Staff, EXL University Library
--


Layouts

There are three basic formats or layouts in which a given section- $\langle n \rangle$ can be displayed: Free; Grid; Split.

Free - the Free layout presents each data field on a separate line, going down the page:

Form Date:	10/08/2004
Sequence:	1
Doc Number:	50029
Order Type:	Serial
Order Number:	51498

Grid - the Grid layout shows data in row-and-column format with grid lines separating rows and columns:

Budget Number:	Vendor Code:	Doc Number:	Doc Sequence:
1234567		000050029	00001

Split - the Split layout presents data in two columns:

Form Date:	10/08/2004	Invoice Status:	Partial
Sequence:	1	Sub Library:	Main Library
Doc Number:	50029	Alpha:	L
Order Type:	Serial	Method Of Aquisition:	Purchase
Order Number:	51498	Order Date:	13/06/2004
Open Date:	13/06/2004	Material Type:	Serial
Order Status:	Sent to vendor	Letter Type:	01
Order Status Date:	13/06/2004	Order Delivery Type:	Single letter
Arrival Status:	Partial		

This is a good solution when you have to display a large number of data fields.

A section-1 can either be Free or Split, but cannot be Grid (since a section-1 can contain a minimum of one field which would look strange in a Grid). A section-2 and higher can be Free, Split or Grid.

CHAPTER 2

Getting Started

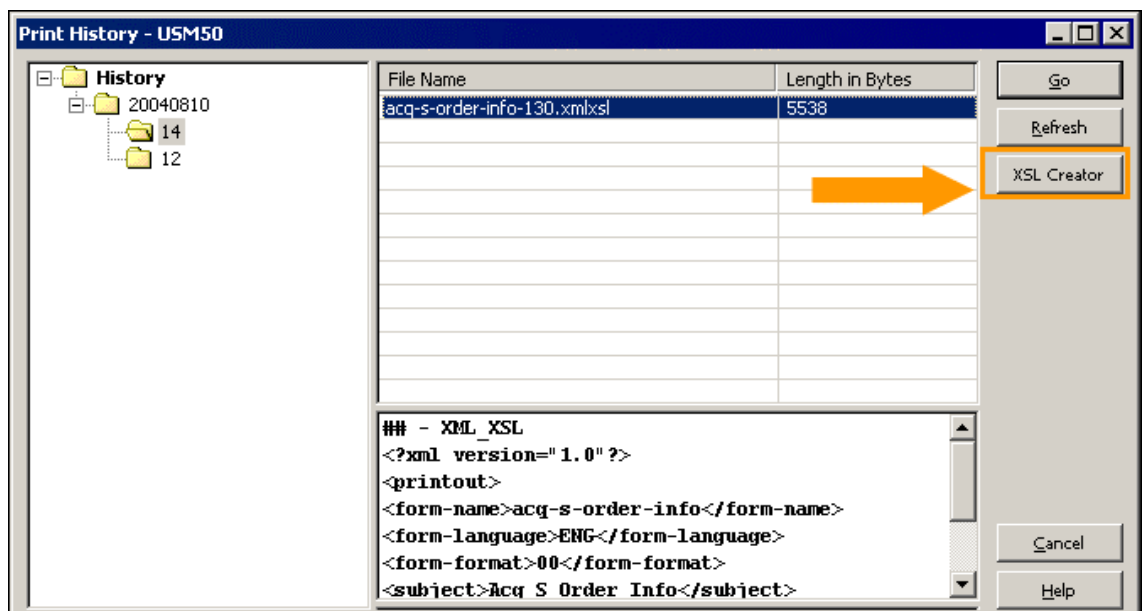
Accessing XSL Creator

XSL Creator is integrated into ALEPH GUIs and is accessed via the Print History functionality. All files that are printed in an ALEPH GUI module are saved in a *history* section in the operator's profile. The history print files can be viewed and/or re-printed, whether they were printed using the function, or created online and printed within the relevant GUI module.

In an ALEPH GUI, if you have a letter or report that you want to customize, you must first print it, then search for it in Print History.

To access XSL Creator

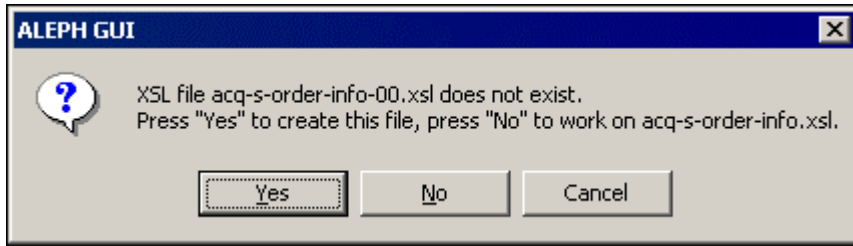
- 1 Click ALEPH, then Print History. Search for your print file in the Print History list. The **XSL Creator** button on the right is dimmed.
- 2 Click the line containing the template you wish to customize:



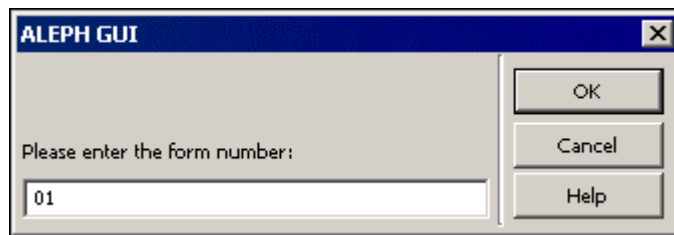
This activates the **XSL Creator** button, provided the line you select contains a file containing a `## - XML_XSL` header (a legal standard ALEPH XML file).

- 3 Click **XSL Creator**. The system searches for a template with an `nn.xml` extension. If a suitable file is found, XSL Creator displays.

If no such file is found, the following message displays:



- Click **No** to display XSL Creator and to begin editing the master template.
- Click **Yes**. The following screen displays:



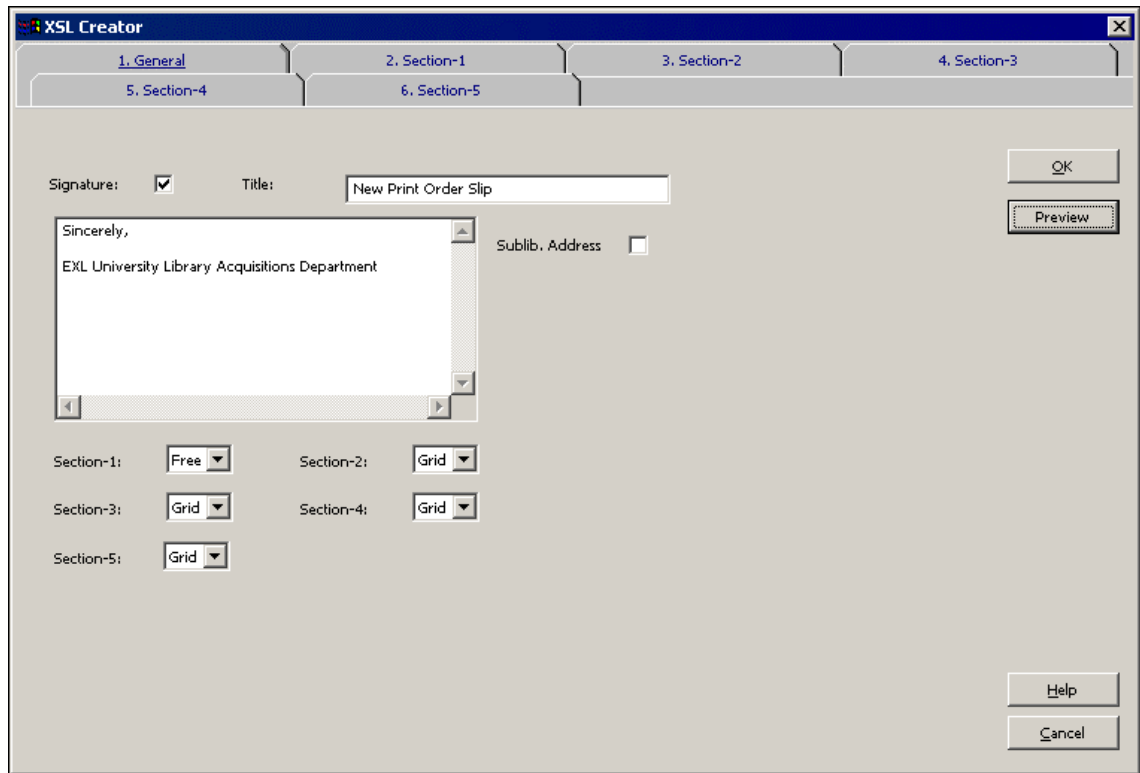
Type the version number of the template and click **OK**. XSL Creator displays.

You can now start editing your template.

Looking at XSL Creator

The XSL Creator consists of a multi-tabbed window. The number of tabs displayed depends on the structure of the print template (in fact, the structure of the XML file) being edited. In the following example, the Order Information template, acq-s-order-info-nn, has a fairly complex structure, consisting of a header section and five data sections. Therefore, six tabs are displayed, General, Section-1, Section 2 and so on.

General Tab

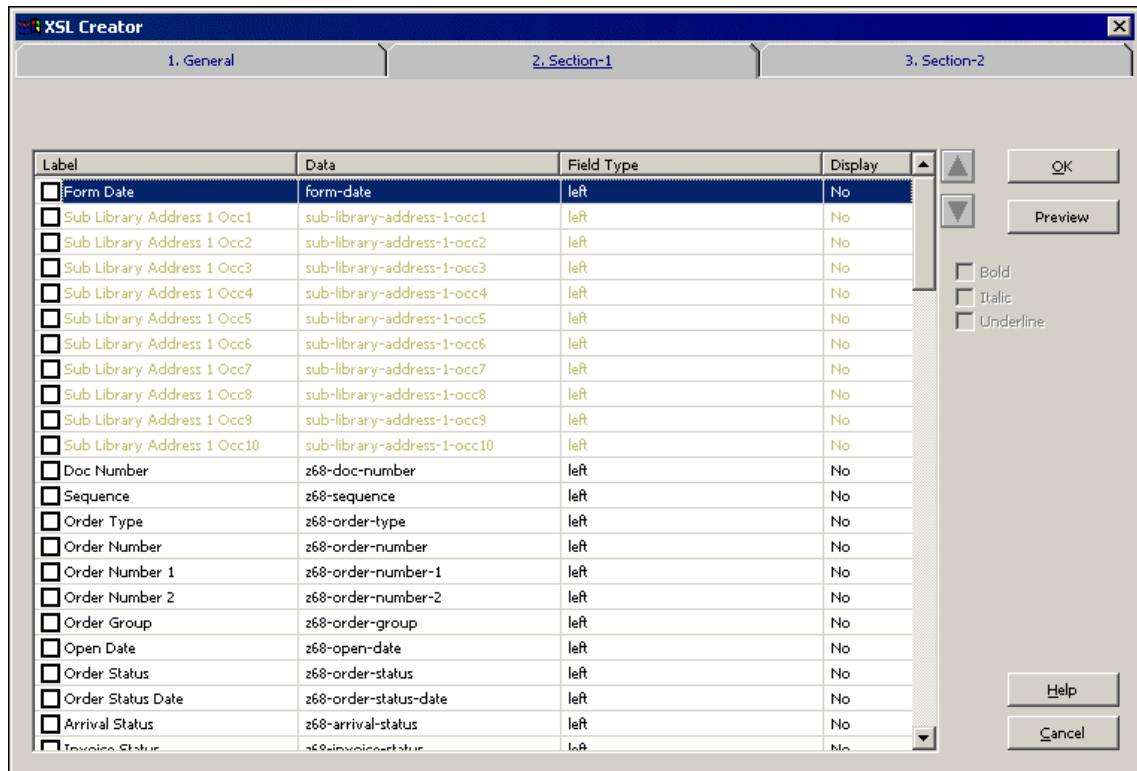


By default, XSL Creator opens at the General tab. This is the environment for defining the general characteristics of your print template, such as signatures, titles, and layout of each section.

In the above example, there is also a predefined option for adding the sublibrary address (Sublib. Address) to the Section-1 of the template. Altogether, there are four predefined items, which can appear on the General tab:

- Sublib. Address
- Vendor
- Patron
- Transfer library address

Data Section Tabs



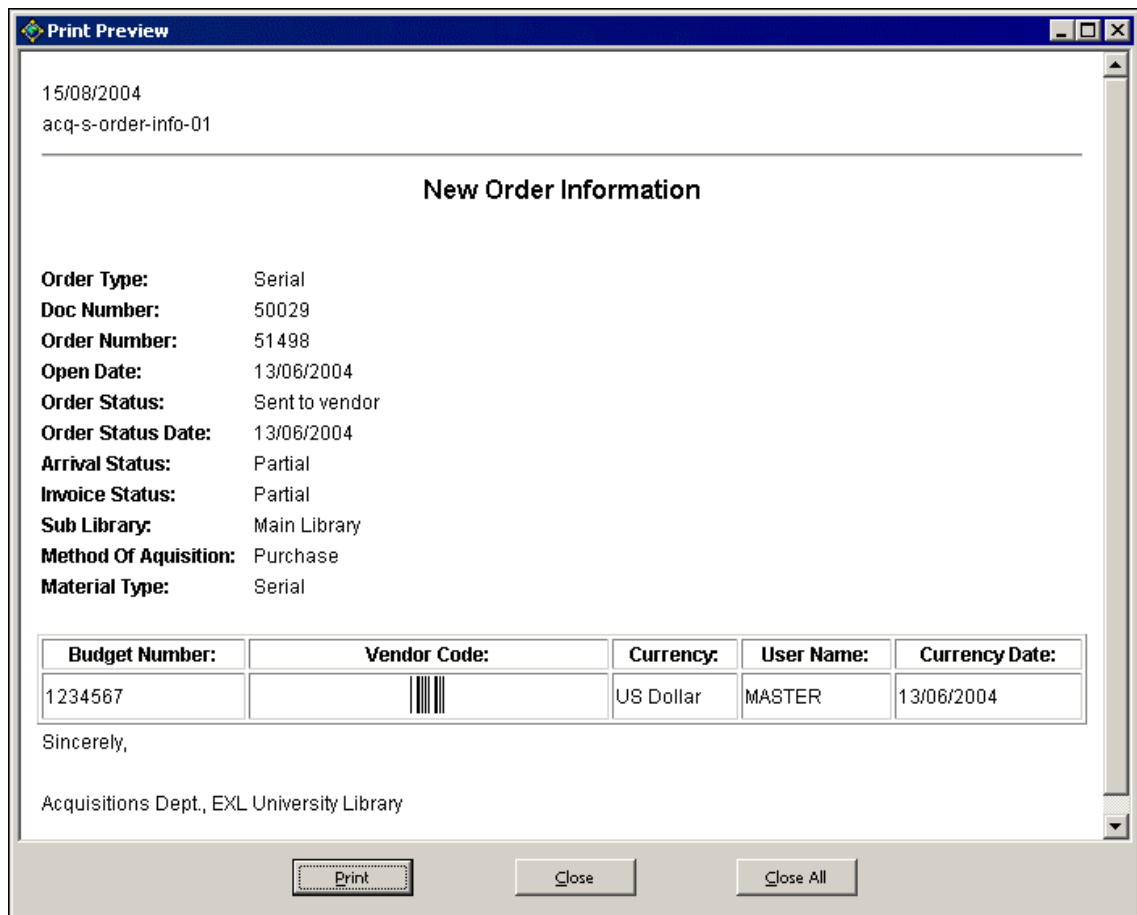
In the above example, the data fields that appear in green are derived from the data field option on the General tab (in this example, sublibrary address). If you want to include them, it is recommended that you simply select the corresponding option on the General tab.

The section tabs consist of tables of data fields available for displaying in your template. The tables are presented in four columns:

- **Label** – The text that precedes the value entered in the template when the print job is run. For example, *Order Status*.
- **Data** – The name of the field in the ALEPH Oracle table or other fields from the XML where the data is stored and retrieved.
- **Field Type** – Justification, content, and format options for the value generated when the print job is run. See Setting the Field Type on page .
- **Display** – Only available in the Free and Split layouts. No (the default) hides the field if the value is empty. Yes shows the field in any case.

Preview Pane

When you click **Preview**, the output displays in a Preview pane. For example, if you add a signature in the General tab, the following displays:



You can then click **Print** in the Preview pane to print the template.

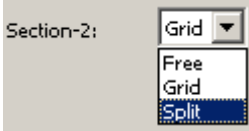
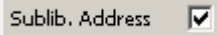
To return to XSL Creator, click **Close** or **Close All**.

CHAPTER 3

Customizing Templates

General Tab Options

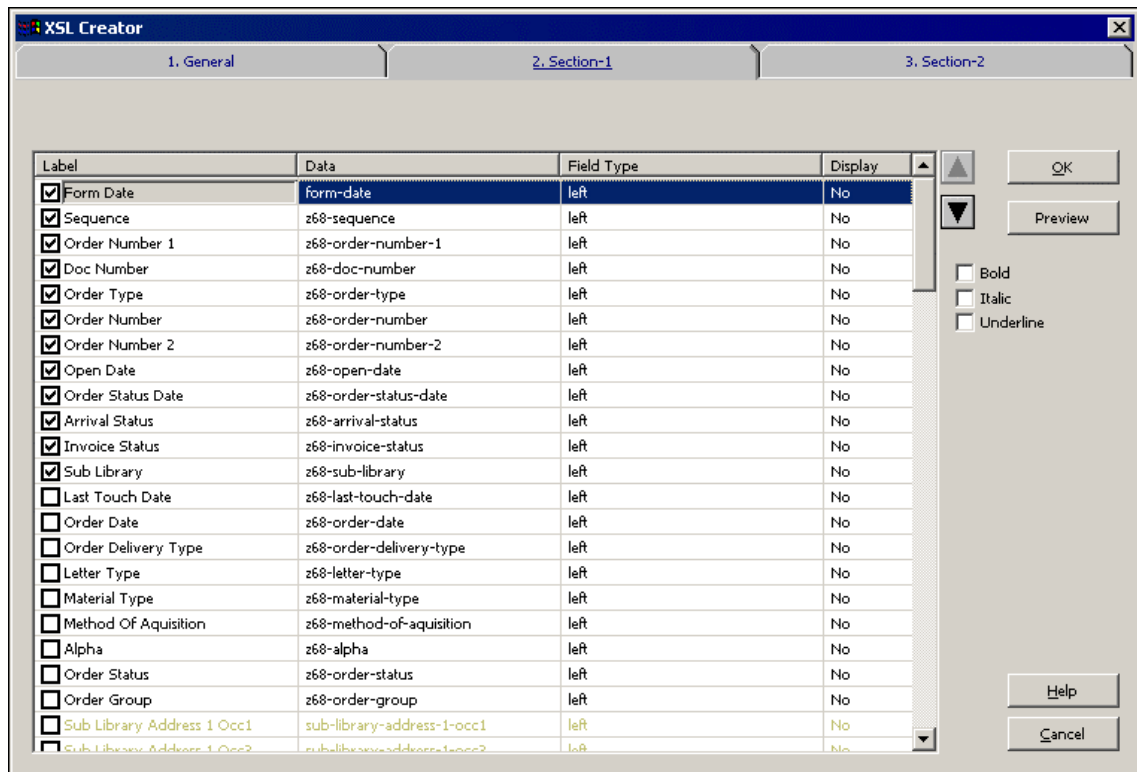
The following options control the General layout of your template.

To	Do this
Add / Modify a signature	Select the Signature check box and type text in the text box below. For example: <i>Sincerely,</i> <i>Acquisitions Department, EXL University Library</i>
Edit the template's title	Type text in the Title text box. For example: <i>New Order Information</i>
Change the layout of a section	Select an option in the adjacent drop-down list. For example: 
Adding a predefined item to the section-1 of the template (for example, Sublib. Address)	Select the adjacent check box. For example: 
Preview your changes	Click Preview .

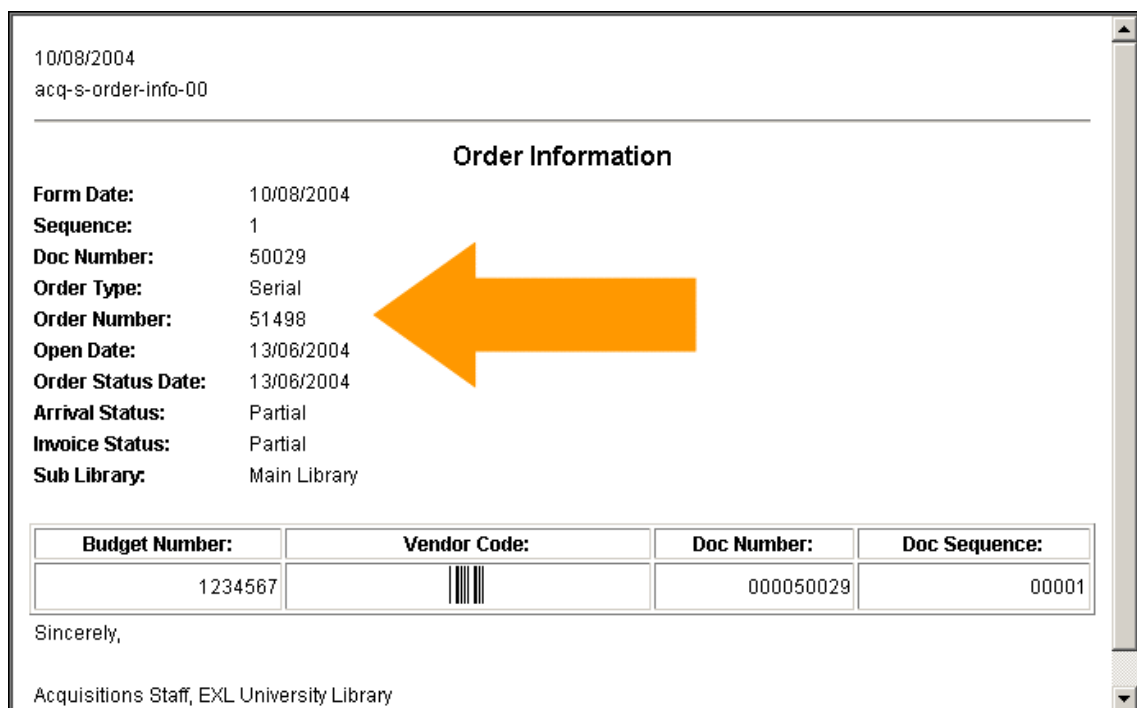
Working With Data Sections

Selecting Fields

You select which fields are displayed in the data sections in your template via the relevant section tab:



The selected fields are displayed in the appropriate section in the template:



Changing the Appearance of Data

Use the data format check boxes in XSL Creator to modify the look of your data:

<input type="checkbox"/>	Bold
<input type="checkbox"/>	Italic
<input checked="" type="checkbox"/>	Underline

Click **Preview** to review your changes:

Form Date:	10/08/2004
Sequence:	1
Doc Number:	50029 ←
Order Type:	Serial ←
Order Number:	51498 ←
Open Date:	13/06/2004
Order Status Date:	<u>13/06/2004</u> ←
Arrival Status:	Partial
Invoice Status:	Partial
Sub Library:	Main Library

Editing Labels

To change the text in a label:

- 1 Select the check box of the appropriate data field:

Label	Data	Field Type	Display
<input checked="" type="checkbox"/> Doc Number	z68-doc-number	left	No
<input type="checkbox"/> Sub Library	z68-sub-library	left	No
<input type="checkbox"/> Last Touch Date	z68-last-touch-date	left	No
<input type="checkbox"/> Form Date	form-date	left	No

- 2 Double-click the leftmost cell (this is the label column). This activates the cell for editing:

Label	Data	Field Type	Display
Document Number	z68-doc-number	left	No
<input type="checkbox"/> Sub Library	z68-sub-library	left	No
<input type="checkbox"/> Last Touch Date	z68-last-touch-date	left	No
<input type="checkbox"/> Form Date	form-date	left	No


- 3 Type your preferred text, and click **Enter**. The edited label is saved and will appear in the printout.

Adding Predefined Lines

Lines can be added to Free and Split layouts, but not to Grid layouts. You add predefined lines in the same way as data fields. There are three kinds of lines:

- **Blank** – Adds a line space to your template:

Budget Number:	1234567
Doc Number:	000050029
Doc Sequence:	00001
Line Number:	00000
Sequence:	400812263096972



- **Horizontal** – Displays a straight horizontal line in your template:

Budget Number:	1234567
Doc Number:	000050029
Doc Sequence:	00001
Sequence:	400812263096972
<hr/>	
Open Date:	13/06/2004

No formatting options are available.

- **Generic** – Allows you to add lines containing free text:

Budget Number:	1234567
Doc Number:	000050029
Doc Sequence:	00001
This is free text in a generic line	
So is this	
Sequence:	400812263096972
Open Date:	13/06/2004

All formatting options (bold, italic, underline) are available.

You can add up to four examples of each line type in each section:

Label	Data	Field Type	Display
<input type="checkbox"/> User Defined 3 Code	z13-user-defined-3-code	left	No
<input type="checkbox"/> User Defined 3	z13-user-defined-3	left	No
<input type="checkbox"/> User Defined 4 Code	z13-user-defined-4-code	left	No
<input type="checkbox"/> User Defined 4	z13-user-defined-4	left	No
<input type="checkbox"/> User Defined 5 Code	z13-user-defined-5-code	left	No
<input type="checkbox"/> User Defined 5	z13-user-defined-5	left	No
<input type="checkbox"/> Price Euro	price-euro	left	No
<input type="checkbox"/> Last Logger Date	last-logger-date	left	No
<input type="checkbox"/> Blank Line			No
<input type="checkbox"/> Blank Line			No
<input type="checkbox"/> Blank Line			No
<input type="checkbox"/> Blank Line			No
<input type="checkbox"/> Horizontal Line			No
<input type="checkbox"/> Horizontal Line			No
<input type="checkbox"/> Horizontal Line			No
<input type="checkbox"/> Horizontal Line			No
<input type="checkbox"/>	Generic Line		No
<input type="checkbox"/>	Generic Line		No
<input type="checkbox"/>	Generic Line		No
<input type="checkbox"/>	Generic Line		No

To add free text in a generic line:



- 1 Click the leftmost cell (this is the label column):

Label	Data	Field Type	Display
<input checked="" type="checkbox"/> Doc Sequence	z601-doc-sequence	left	No
<input checked="" type="checkbox"/> Invoice Number	z601-invoice-number	left	No
This is free text in a generic line	Generic Line		No
<input checked="" type="checkbox"/> So is this	Generic Line		No
<input checked="" type="checkbox"/> Sequence	z601-sequence	left	No
<input checked="" type="checkbox"/> Open Date	z601-open-date	left	No
<input checked="" type="checkbox"/> Object Code	z601-object-code	left	No

- 2 Type free text, and click **Enter**. To edit your free text, click the leftmost cell again.

Reordering Data Fields



Use the  arrows or drag-and-drop to change the order in which data fields appear in your template. This option applies to all layouts. For example, if you want *Doc Number* to appear above *Vendor Code*, select the line containing *Doc Number* and click the  arrow:

Label	Data	Field Type	Display
<input checked="" type="checkbox"/> Start Split			
<input checked="" type="checkbox"/> Right Side Fields:			
<input checked="" type="checkbox"/> End Split			
<input checked="" type="checkbox"/> Budget Number	z601-budget-number	left	No
<input checked="" type="checkbox"/> Vendor Code	z601-vendor-code	left	No
<input checked="" type="checkbox"/> Doc Number	z601-doc-number	left	No
<input checked="" type="checkbox"/> Doc Sequence	z601-doc-sequence	left	No
<input checked="" type="checkbox"/> Invoice Number	z601-invoice-number	left	No

Working With Grid Layouts

Grid layouts are generally used for displaying numerical information.

Adding Titles to a Grid

To add a title to a Grid:

- 1 Select the check box of the Grid Title data field:

Label	Data	Field Type
<input checked="" type="checkbox"/>	Grid Title	
<input checked="" type="checkbox"/> Budget Number	z601-budget-number	left
<input checked="" type="checkbox"/> Currency	z601-currency	left
<input checked="" type="checkbox"/> Currency Date	z601-currency-date	left
<input checked="" type="checkbox"/> Currency Ratio	z601-currency-ratio	left
<input checked="" type="checkbox"/> Original Sum	z601-original-sum	left

- 2 Double-click the leftmost cell (this is the label column). This activates the cell for editing:

Label	Data	Field Type
Budget Info	Grid Title	
<input checked="" type="checkbox"/> Budget Number	z601-budget-number	left
<input checked="" type="checkbox"/> Currency	z601-currency	left
<input checked="" type="checkbox"/> Currency Date	z601-currency-date	left
<input checked="" type="checkbox"/> Currency Ratio	z601-currency-ratio	left
<input checked="" type="checkbox"/> Original Sum	z601-original-sum	left

- 3 Type your preferred text, and click **Enter**. The edited label is saved and will appear in the printout.

Budget Info				
Budget Number:	Currency:	Currency Date:	Currency Ratio:	Original Sum:
1234567	US Dollar	03/09/2003	0.00	1.00

Working with Split Layouts


Split layouts are useful when you want to include a large number of data fields in your template while keeping down the length of the printout.

In the list of data fields for a Split section, three lines used for defining the two-column format appear:

Label	Data	Field Type	Display
<input checked="" type="checkbox"/> Start Split			
<input checked="" type="checkbox"/> Right Side Fields:			
<input checked="" type="checkbox"/> End Split			
<input checked="" type="checkbox"/> Doc Number	z68-doc-number	left	No
<input checked="" type="checkbox"/> Sequence	z68-sequence	left	No
<input checked="" type="checkbox"/> Order Type	z68-order-type	left	No
<input checked="" type="checkbox"/> Order Number	z68-order-number	left	No
<input checked="" type="checkbox"/> Order Number 1	z68-order-number-1	left	No
<input checked="" type="checkbox"/> Order Number 2	z68-order-number-2	left	No
<input checked="" type="checkbox"/> Order Group	z68-order-group	left	No
<input checked="" type="checkbox"/> Open Date	z68-open-date	left	No
<input checked="" type="checkbox"/> Order Status	z68-order-status	left	No
<input checked="" type="checkbox"/> Order Status Date	z68-order-status-date	left	No
<input checked="" type="checkbox"/> Arrival Status	z68-arrival-status	left	No
<input checked="" type="checkbox"/> Invoice Status	z68-invoice-status	left	No
<input checked="" type="checkbox"/> Last Touch Date	z68-last-touch-date	left	No
<input checked="" type="checkbox"/> Sub Library	z68-sub-library	left	No
<input checked="" type="checkbox"/> Alpha	z68-alpha	left	No
<input checked="" type="checkbox"/> Method Of Aquisition	z68-method-of-aquisition	left	No
<input checked="" type="checkbox"/> Order Date	z68-order-date	left	No
<input checked="" type="checkbox"/> Material Type	z68-material-type	left	No

- Start Split – defines where the two-column layout begins. Initially, data fields are displayed on the left.
- Right Side Fields – Sets the point at which data fields are displayed on the right side.
- End Split – This is the point at which the two-column layout ends. Any data field set to display that follows the End Split line will appear on the left.

Let us assume you have 16 data fields, which you want to display in a two-column format. To

ensure that the columns in your Split layout are even, using the  arrows or drag-and-drop, place eight fields above Right Side Fields, and eight fields above End Split:

Label	Data	Field Type	Display
<input checked="" type="checkbox"/> Start Split			
<input checked="" type="checkbox"/> Doc Number	z68-doc-number	left	No
<input checked="" type="checkbox"/> Sequence	z68-sequence	left	No
<input checked="" type="checkbox"/> Order Type	z68-order-type	left	No
<input checked="" type="checkbox"/> Order Number	z68-order-number	left	No
<input checked="" type="checkbox"/> Open Date	z68-open-date	left	No
<input checked="" type="checkbox"/> Order Status	z68-order-status	left	No
<input checked="" type="checkbox"/> Order Status Date	z68-order-status-date	left	No
<input checked="" type="checkbox"/> Arrival Status	z68-arrival-status	left	No
<input checked="" type="checkbox"/> Right Side Fields:			
<input checked="" type="checkbox"/> Invoice Status	z68-invoice-status	left	No
<input checked="" type="checkbox"/> Last Touch Date	z68-last-touch-date	left	No
<input checked="" type="checkbox"/> Sub Library	z68-sub-library	left	No
<input checked="" type="checkbox"/> Method Of Aquisition	z68-method-of-aquisition	left	No
<input checked="" type="checkbox"/> Order Date	z68-order-date	left	No
<input checked="" type="checkbox"/> Material Type	z68-material-type	left	No
<input checked="" type="checkbox"/> Letter Type	z68-letter-type	left	No
<input checked="" type="checkbox"/> Delivery Type	z68-delivery-type	left	No
<input checked="" type="checkbox"/> Order Delivery Type	z68-order-delivery-type	left	No
<input checked="" type="checkbox"/> End Split			
<input checked="" type="checkbox"/> Send Method	z68-send-method	left	No
<input checked="" type="checkbox"/> Alpha	z68-alpha	left	No
<input type="checkbox"/> Order Number 2	z68-order-number-2	left	No
<input type="checkbox"/> Order Group	z68-order-group	left	No

The resulting printout looks like this:

10/08/2004			
acq-s-order-info-88			
<hr/>			
Doc Number:	50029	Invoice Status:	Partial
Sequence:	1	Sub Library:	Main Library
Order Type:	Serial	Method Of Aquisition:	Purchase
Order Number:	51498	Order Date:	13/06/2004
Open Date:	13/06/2004	Material Type:	Serial
Order Status:	Sent to vendor	Letter Type:	01
Order Status Date:	13/06/2004	Delivery Type:	Surface mail
Arrival Status:	Partial	Order Delivery Type:	Single letter
Send Method:	Print		
Alpha:	L		

The two data fields placed below the End Split line, *Send Method* and *Alpha*, appear on the left, as in a Free layout.

Changing Field Types

You can change the display characteristics of a value retrieved in a data field in a number of different ways. To access the available options, select the appropriate line and double-click the corresponding cell in the Field Type column:

Label	Data	Field Type
<input checked="" type="checkbox"/>	Grid Title	
<input checked="" type="checkbox"/> Budget Number	z601-budget-number	left
<input type="checkbox"/> Sequence	z601-sequence	left
<input type="checkbox"/> Vendor Code	z601-vendor-code	right
<input type="checkbox"/> Invoice Number	z601-invoice-number	bib-info
<input type="checkbox"/> Line Number	z601-line-number	restart
<input type="checkbox"/> Doc Number	z601-doc-number	barcode
		check

The available options are:

- **left** – the value shown is left-justified:
- **right** – the value shown is right-justified
- **bib-info** – enters related bibliographic information in a grid layout
- **restart** – at present, this is relevant for one printout only, orders-per-budget.xsl. Allows you to break a grid into values (for example, order data) per groupings (in this case, budgets).
- **barcode** – the value is shown as a barcode
- **check** – the value is shown as a check box
- **index** – instead of display a value, it displays the row number

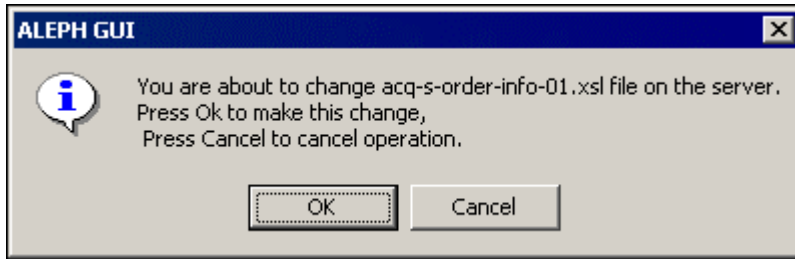
Not all options shown in the above example are available for all data fields – it depends on the context.

Saving Templates

When you have finished defining your template, you are ready to save your customized template.

To save a template

- 1 Click **OK**. The following message displays:



- 2 Click OK to send your template to the ALEPH server. If the file already exists, the system backs up the previous version and replaces it with the new version. You will be notified about this by a pop-up message. In any case, UTIL I/6 is invoked and repackages all *.xml templates in the library's `form_<lng>` directory. After UTIL I/6 has been run, all clients can be reconnected to the server and can get the up-to-date XSL files.