



USER DOCUMENTATION (ALEPHINO 5.0)

# How to customize the OPAC

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## 0. Preliminary remarks

Customising the Web OPAC requires an adequate knowledge in HTML (HyperText Markup Language). If you're not familiar with HTML so well, we recommend leaving the Web OPAC files as they are. In case of incorrect changes in the HTML files, we cannot guarantee smooth operation of the OPAC.

The Alephino web pages all have the file ending **.htt** (for HyperTextTemplate). This way, the files can be edited more comfortably under Windows after assigning a program for editing files of this type. The pages are mostly not complete html pages but only fragments. An overview over all pages can be found at the end of this document.

If a file **filename\_P.htt** exists -where P is the one-digit code of the current database- this file is used taking priority over the corresponding basic page filename.htt. This way it is possible to design individual pages for each database.

The files of the Web OPAC are located in directories named after the respective communication language, i.e. **htdoc/alipac\_ger** for the German user interface, **htdoc/alipac\_eng** for the English etc. Changes should always be done in all languages that you want to have displayed. The main configuration file of the Web OPAC is named **alipac.cfg** and located in the directory etc.

Changes in files in the directory htdoc are effective after reaccessing the Web OPAC (or clicking on button Refresh in the browser).

To activate changes in control files located in etc, the Alephino server must be restarted.

The files should not be edited with an Html editor but only with a text editor, e.g. Wordpad or Notepad, as the pages are mostly only incomplete fragments and also contain non-Html elements like parameters which are vital for operating the OPAC.

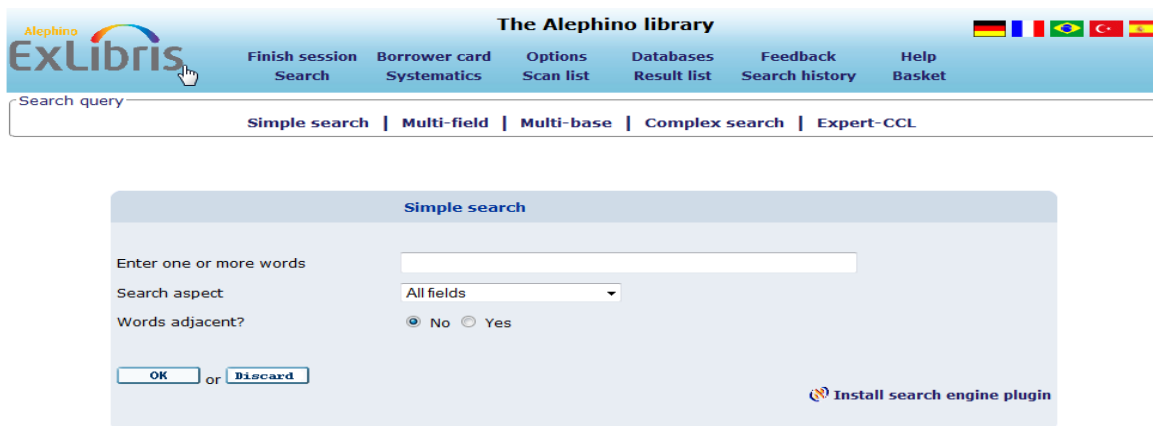
After changing the files, your installation differs from the standard version. The changes must be maintained manually by the customer after upgrading to higher a version or installing an update. For this, we suggest the following procedure:

- backup your customised files in a separate directory
- document which changes you have made

This way you can always reconstruct which changes you have made in which files and then maintain these changes after an Update installation if necessary.

When there is a new release, the documentation always contains a list of files which are taken over when using the "Update installation" mode instead of "New installation" when installing the new release. All other files will be overwritten. Changes which were done in these files, must then be done again manually in the new file again. You must never simply copy your old customized files into the new release and overwrite its new files!

# 1. Adaptation of the start page



## 1.1. Change the logo

To replace the Alephino logo in the upper left corner with your own logo, first copy the image file that contains the new logo, into the directories `htdocs/alipac_[lng]/icon`. Then you need to update the files `menu.htt` and `menu-bor.htt`.

```
<div id="menu-background">
<table width="100%" border="0" cellspacing="0" cellpadding="0" align="center">
<tr>
<td width="20%" height="90px">
  <a href="http://www.exlibrisgroup.com/de">
    
  </a>
</td>
</tr>
</div>
```

- Replace **alephino-logo.gif** by the filename of your logo. Perhaps also the image size needs to be adapted.
- Replace the **URL** and **name** of your institution library.

## 1.2. How to replace the library name in the headline

The name of the library respectively the current catalog that is displayed in the header is configurable depending on the selected language of communication. Pls. process sections (Names[**lng**]) in file `etc/alipac.cfg` for the naming of your databases. Note that **lng** stands for shorthand symbol of the respective communication language.

(NamesENG)

M-TIT = **The Alephino Library**

...

(NamesGER)

M-TIT = **Die Alephino Bibliothek**

...

### 1.3. How to disable functions that are not required

All OPAC functions are enabled and visible in the menu in its initial state. If you want to hide menu entries respectively functions that are not required in your library, pls. process files *htdocs/alipac\_**[lng]**/menu.htm* and *htdocs/alipac\_**[lng]**/menu-bor.htm*. As already mentioned, the **lng** stands for abbreviation of the respective language. File *menu-bor.htm* contains headline and menu of the OPAC site after successful user identification. With that additional functions become visible.

Example: Removal of menu entry „Borrower card“ by out-commenting

```
<td class="mainmenu" valign="middle" width="15%" align="center" nowrap>
  <a href="&server_session/form/end-session" class="blue"
    title="Finish session">
    Finish session</a>
</td>
<!--
<td class="mainmenu" valign="middle" width="15%" align="center" nowrap>
  <a href="&server_session/bor-info" class="blue"
    title="Log in to get access to borrower account">
    Borrower card</a>
</td>
-->
<td class="mainmenu" valign="middle" width="15%" align="center" nowrap>
  <a href="&server_session/option-display" class="blue"
    title="Adjustments for viewing search results">
    Options</a>
</td>
```

Hint: The menu of the OPAC is represented by a HTML table of 2 lines, menu entries are table cells. By removal of menu entries respectively table cells the symmetry may become disrupted, therefore we recommend to add empty cells at the end.

## 2. Adaptation of the search screens

### 2.1. Search aspects and scan lists

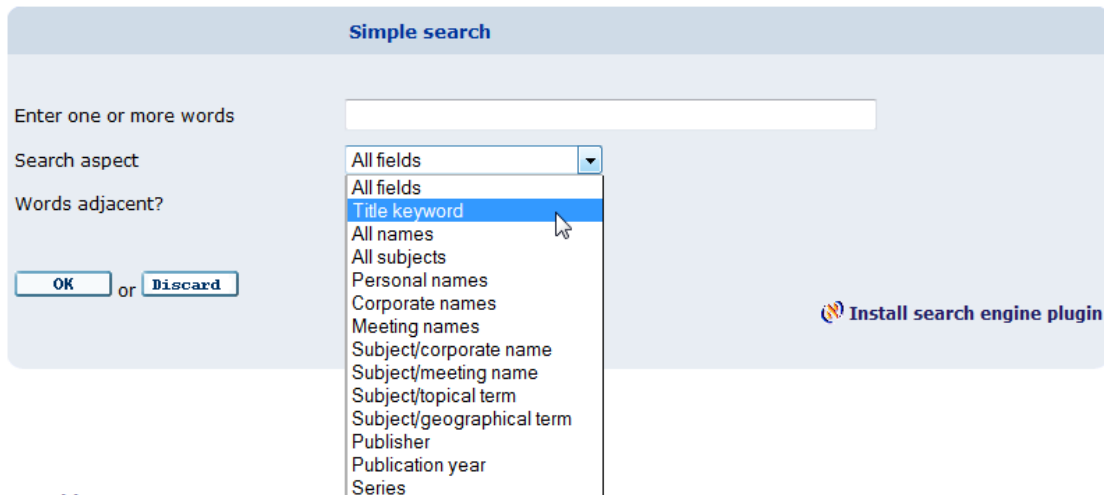
The search screens „Simple search“, „Multibase“ and „Complex Search“ make use of selection boxes covering almost all search aspects that are valid for the title masterfile. Depending on the specific use of the Alephino masterfiles search aspects may be empty and hence nothing can be found when using them. That's why we recommend to limit the list of search aspects to the ones

that are „filled with life“ at your library. This is not only valid for the regular search but also for the scan lists and systematics.

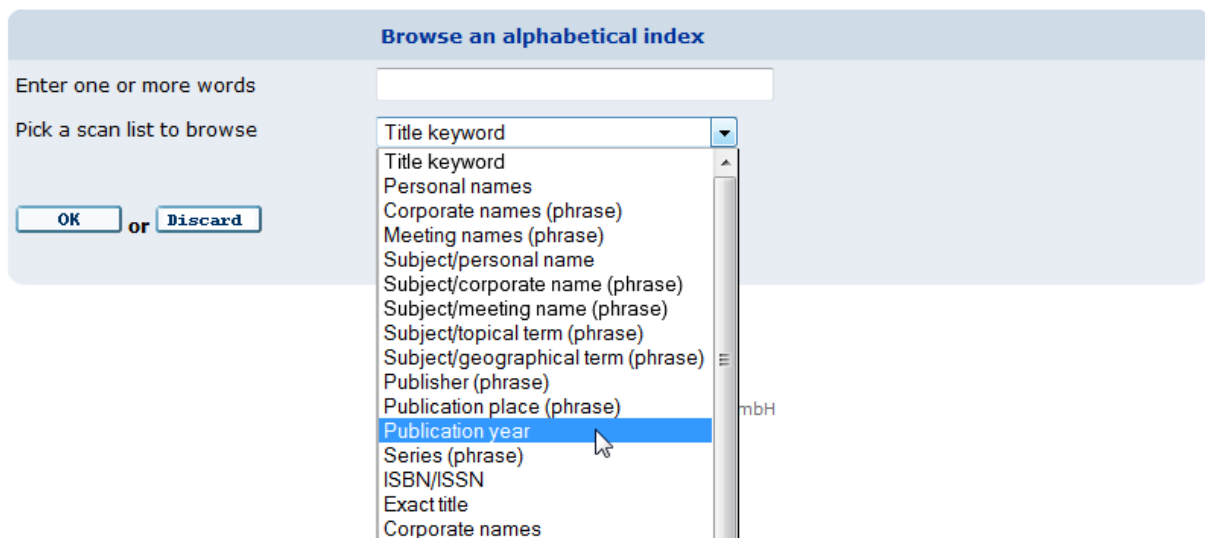
For this pls. process section (SearchTerms) in the main OPAC configuration file etc/alipac.cfg:

**(SearchTerms)**

FIND = WRD,TIT,NAM,SUB,PER,COR,MEE,SCO,SME,TOT,GEO,PUB,YEA,SRS,TRM,ISN  
 SCAN = TIT,PER,COP,MEP,SPE,SCP,SMP,TTP,GEP,PUP,PLP,YEA,SRP,ISN,TIP,COR,MEE,SME,SCO,TOT,GEO,PUB,SRS  
 REFINE = WRD,TIT,PER,COR,MEE,SPE,SCO,SME,TOP,GEO,PUB,PLA,YEA,SRS,ISN  
 AUTOTRUNC = PER,COR,PUB  
 SYSIDX = PER:SUB,COP:SUB,MEE:SUB,TIT:SUB,SCT:SUB,TTP:SUB,GEP:SUB,GEN:SUB,TRM:THS,NOT:THS,TOP:THS



- After **FIND=** all search aspects are listed that shall be visible in select-boxes available in search screens. Language specific names for search aspects can be found – and possibly adapted – in sections (NamesGER), (NamesENG) etc.



- Label **SCAN=** precedes those search aspects that shall be available for scan lists. Pls. note that:
  - a) so called family aspects, that are search aspects covering multiple indexes for joint search, are not applicable. The most prominent example for a family aspect is „WRD“ in which almost all indexes are included enabling kind of „Google-like“ search mode.
  - b) The OPAC supports the search the way that if no target information could be found the respective scan list is displayed with the search word initially requested shown in the middle. For this the respective scan aspect must be included in the SCAN= list

**Modify your search result by adding more search aspects** ✖

Select a boolean operator to expand your search query with. AND or NOT will limit your search results; by use of the OR operator the number of search results might be extended.

AND  OR  NOT

Pick an aspect and enter a search word.

**Search aspects**

**Enter a word or**

- All fields
- Title keyword
- Personal names
- Corporate names**
- Meeting names
- Subject/personal name
- Subject/corporate name
- Subject/meeting name
- Top term
- Subject/geographical term

- **REFINE=** is the label preceding a list of search aspects that shall be available for modification of search results. It is obvious that these aspects can only be a subset of the ones declared by **FIND=**.
- Label **AUTOTRUNC=** addresses a list of search aspects that shall be right-truncated automatically. With that you save the user from exact spelling of search words. This is particularly useful in combination with personal names that are indexed as **Family name**, **First name**.

**Search systematics**

Enter one or more words

Pick an aspect to browse

or

- Subject/personal name
- Subject/personal name
- Subject/corporate name
- Subject/meeting names
- Subject/uniform title
- Subject/chronological term
- Subject/topical term**
- Subject/geographical term
- Subject/form terms
- Thesaurus Term

- The registers searchable in the context of systematic search registers are to be declared after parameter **SYSIDX=**. Since the search terms may refer to other than the title file, here the following notation is used: **ASP:FIL** while ASP is the 3-digit code of the search aspect and FIL denotes the 3-digit abbreviation of the corresponding master file. The respective language-specific names can be found, as already explained in the sections (NamesGER), (NamesENG), etc.
- Label **SYSFIND=** denotes a special case of a systematics list used in combination with the subjects register in the German standard MAB.

## 2.2. Search aspects in screen „Multi-field“

In the "Multi-field" screen search aspects are assigned to a fixed input field. If several fields are filled, there is an implicit AND combination of all keywords.

Multi field search

OK or Discard

Words from title  Scan list

Exact Title  Scan list

Subject (topical term)  Scan list

Author, Person  Scan list

Corporate body  Scan list

Series title  Scan list

Publisher  Scan list

Publishing place  Scan list

Year of publication  Scan list

Words adjacent?  No  Yes

OK or Discard

To align this screen file(s) *htdoc/alipac\_[Ing]/find-fix-form.htm* need to be processed. In the subsequent example search aspect "Subject (topical term)" shall be replaced by "Thesaurus term". All input fields are organized in the form of a HTML table, rows can be added or removed on demand.

Example: Replacement of search aspect „Subject (topical term)“ by „Thesaurus term“:

```
...
<tr>
<td nowrap>
  Subject (topical term)           ← Replace by: Thesaurus term
</td>
<td>
  <input type="hidden" name="O3" value="AND">
  <input type="hidden" name="F3" value="TTP">           ← Replace by: TRM
  <input size="60" name="V3" value="$0003">
  <input type="submit" name="S3" value="Index">
</td>
</tr>
...
```

Pls. note the numbering of elements, here: O3, F3, V3, S3 and \$0003. All elements assigned to a search aspect must have the exact same number. If you want to add a search aspect to the screen make sure that its number is not already allocated.

The placeholder preceded by Dollar \$ sign must be followed by a 4-digit number and hence need to be filled with leading zeroes.



## 3. Adaptation of display formats

### 3.1. Title record full display format

For the full format display of title records in OPAC a definition separated from the one responsible for the GUI is used. Consequently the representation of title records in OPAC can be adapted without affecting the GUI modules cataloging, circulation and acquisition.

The screenshot shows the Alephino library OPAC interface. At the top, there is a navigation bar with the Alephino logo, the text 'The Alephino library', and several menu items: 'Finish session Search', 'Borrower card Systematics', 'Options Scan list', 'Databases Result list', 'Feedback Search history', and 'Help Basket'. Below this, there are buttons for 'Add to basket', 'Save/e-mail', 'Google Book Search', and 'amazon'. A 'Display format' dropdown menu is set to 'Standard', with other options 'Raw record' and 'Catalog card'. The main content area shows 'Record 1 of 1' with 'Previous Record' and 'Next Record' buttons. The record details are as follows:

<b>Book cover</b>	
<b>The 13 1/2 lives of Captain Bluebear :</b>	
<b>Digital object</b>	<a href="#">A picture of the blue bear</a>
<b>LC Control No.</b>	2008540173
<b>LC Call No.</b>	PT2673.O293 A61313 2000
<b>Personal name</b>	Moers, Walter, Personal dates: 1957-
<b>Uniform title</b>	13 1/2 Leben des Käpt'n Blaubär. English
<b>Main Title</b>	The 13 1/2 lives of Captain <b>Bluebear</b> : being the demibiography of a seagoing bear ... and excerpts from the 'Encyclopedia of the marvels, life forms and other phenomena of Zamonia and the its environs,' by Professor Abdulla Nightingale / Walter Moers ; translated by John Brownjohn.
<b>Varying form</b>	Thirteen and a half lives of Captain <b>Bluebear</b>
<b>Imprint</b>	London : Secker & Warburg, 2000.
<b>Physical description</b>	702 p. : ill. ; 24 cm.
<b>General note</b>	Maps on lining papers.

If you want to have fields added, removed or changed in their way of representation, section *(titwww)* in file *etc/marcform.ext* needs to be modified:

```
(titwww)
TAG=COV,NAME=011COV,INFO='EXTERNAL_LINK,IMG'
TAG=245,INFO='OPAC_EMPH',TEXT='6abcfghknps'
TAG=000,NAME=011OBJ,SUB=objxtlink,PROC='objauth',INFO='OPAC_LINK:OBJLINK'
...
TAG=100,NAME=011100$L,INFO='ACC_LINK,PER',SUB=person
TAG=110,NAME=011110$L,INFO='ACC_LINK,COP',SUB=corp
...
TAG=245,NAME=011245,INFO='ACC_LINK,TIP',TEXT='6abcfghknps'
...
```

Comprehensive information about the general method of data formatting in Alephino can be found in our documentation „Alephino control tables“, chapter 3.6 „Definition display field“.

### 3.2. Brief list

As already explained for the full record display also for the OPAC brief list a separate format definition is used.

Example:

#	Author	Title	Year	It.	Location
1	Moers, Walter,	The 13 1/2 lives of Captain Bluebear	2000.	2	Bluebear.761

If you want to modify this list, perhaps in order to create another representation of locations or call numbers, section (*titlwww*) in file *etc/marclist.ext* needs to be processed:

```
*** Bibliography Web OPAC
(titlwww)
COLUMN=1,TAG=recnumb,LAYOUT=1,WIDTH=5,HEAD='#035'
COLUMN=2,TAG=dummy,LAYOUT=1,WIDTH=5
COLUMN=3,TAG=titl7,LAYOUT=1
COLUMN=4,TAG=titl3,LAYOUT=1,WIDTH=20,HEAD=011HEAD12
COLUMN=5,TAG=titl2,LAYOUT=1,WIDTH=40,HEAD=011HEAD13
COLUMN=6,TAG=titl4,LAYOUT=1,WIDTH=9,HEAD=011HEAD14
COLUMN=7,TAG=titl5,LAYOUT=1,WIDTH=7,HEAD=011HEAD15
COLUMN=8,TAG=titl6,LAYOUT=1,WIDTH=14,HEAD=011HEAD16
```

Comprehensive information about the formatting of lists in Alephino can be found in our documentation „Alephino control tables“, chapter 3.4 „Definition columns“ in combination with 3.6 „Definition display field“.

Pls. note that the order of columns in the brief list corresponds with the numbering of placeholders \$0100 ... \$0800 in web pages *htdoc/alipac\_[lng]/short-table-head.htm* (for the column headers) and *htdoc/alipac\_[lng]/short-table-row.htm*. The first definition line below (*titlwww*) is responsible for placeholder \$0100, the second for \$0200 etc.

Columns no. 1, 2, 3, 5 and 7 are of special importance for the navigation in the OPAC and hence are combined with the internal logic. Its allocation must not be altered.

## 4. Virtual bases

With Alephino you have the opportunity to limit the inventory that can be found via the OPAC to a certain portion of the stock based on a hidden aspect that is added to every user initiated search query. This way a limited, „virtual“ database can be presented in the OPAC in addition to or alternatively to the overall stock.

### Example:

You want to present a virtual base covering all titles in german language. Since this information is stored in Alephino tag **LNG** with the same name for search aspect this is the one to be used for filter criterion.

- a) First step is definition of a virtual database in file *etc/marcfile.ext* as follows:

```
*
* Virtual database with implicit filter criterion
*
FILE=TIX,DEFIN=011,INDEX=titindex,LINK=titlink,LOCATE=titloc,SFX=titsfx,FORM=TIT
FILTER='LNG=ger'
...
```

Pls. note that an indent is necessary to mark subsequent lines as continuation. To make the change effective the Alephino server needs to be restarted.

- b) To have our virtual base „B-TIX“ added to the database list in the Web OPAC, we need to process section (*Libraries*) in file *etc/alipac.cfg*:

```
(Libraries)
B-TIT = localhost:2069
B-TIX = localhost:2069 ← The new database
...
```

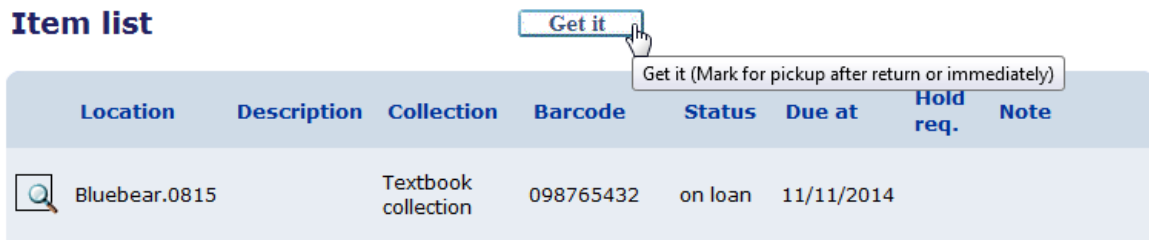
- c) To have the new database displayed not just with its symbol „B-TIX“ but a language specific long name, sections **(Names[lng])** need to be updated too:

```
(NamesENG)
B-TIT = Library catalog
B-TIX = German titles only ← „Long name“ (english)
...
(NamesENG)
B-TIT = Bibliothek Gesamtbestand
B-TIX = Deutschsprachige Titel ← „Long name“ (german)
...
```

## 5. How to disable the „GetIt“ function

If your library makes no use of the Alephino circulation module and hence the possibility of placing hold requests via the OPAC is not sensible, this function should be disabled.

### Item list



The screenshot shows a table with columns: Location, Description, Collection, Barcode, Status, Due at, Hold req., and Note. A row is visible with the following data: Location: Bluebear.0815, Description: (empty), Collection: Textbook collection, Barcode: 098765432, Status: on loan, Due at: 11/11/2014, Hold req.: (empty), Note: (empty). A 'Get it' button is positioned above the 'Status' column of this row, with a tooltip that reads 'Get it (Mark for pickup after return or immediately)'.

Location	Description	Collection	Barcode	Status	Due at	Hold req.	Note
Bluebear.0815		Textbook collection	098765432	on loan	11/11/2014		

For this parameter „HoldRequest“ in section *(Permissions)* of file *etc/alipac.cfg* must be updated:

```
(Permissions)
HoldRequest = Y
LoanRenew = N ← Set parameter value to N(o)
...
```

## 6. Sorting of the result list

By default search results appear unsorted - or rather sorted in the opposite order of the original data collection. For the brief list of titles a sort order can be predefined that becomes effective immediately after having performed a search query, not after having clicked a column header explicitly. For this again file *etc/alipac.cfg* needs to be processed:

```
(Options)
SHORT-NO-LINES = 20
AUTO-FULL      = 05
SHORT-FORMAT   = 000
ITEMSORT       = D
PRESORT        = Year      ← Automatic sorting by publication year
...
```

The „Year“ relates to one of the already predefined sort orders that is expected to be present in section „SortENG“ (for the english language):

```
(SortENG)
Year = -1,4 "; sorted by year, title (descending)"
Author = 3,4 "; sorted by author, title"
Title = 4,1 "; sorted by title, year"
```

Please note that sorting a set of hits requires a high computational complexity and consequently causes a delay of waiting server transactions. That is why we recommend to limit the number of hits for sorting by parameter „MaxSort“.

```
(Webapp)
Counter = ../data/paccount.txt
Log = ../temp/alipac.log
Translate = ../etc/utf2html.trl
Application = eng
MaxConns = 100
MaxSort = 300      ← Sorting is only effective up to 300 search hits
```