Introduction

This tutorial introduces the management of WebPAC Pro using the Millennium Administration module and the Web Master and Web Options modes.

Whether you make just a few, or many changes to the WebPAC, this tutorial can help you by providing an overview, helpful references, and step-by-step instructions for performing common management tasks.

The tutorial will concentrate on the primary elements of WebPAC management:

- 1. Presentation
- 2. Content
- 3. Functionality

The tutorial as a whole can be used in different ways.

Step - by step

For the new WebPAC administrator, or for the customer who is just beginning to implement their Millennium system, it can be followed in a step-by-step manner, using the

PREVIOUS PAGE and NEXT PAGE

navigation icons, in which case it will cover all topics in the tutorial.

Topic based approach

A second way to use the tutorial is to use the topic based approach. Simply select the topic you are interested in (Functionality, for example) and link directly to the section that deals with that topic.

Reference guide

Finally, customers who wish to use the tutorial as a reference guide to information about the WebPAC can use the links within the tutorial to go directly to the page in the Innovative Guide & Reference with the information about the topic in question.

Navigation & Requirements

- At the bottom of each page are links to the next and previous pages. We recommend you follow through the tutorial steps using the
 NEXT PAGE

 and

 PREVIOUS PAGE options.
- At any time you can select from the drop down menus on the navigation bar across the top of each page.
- Within pages there are links to other pages in the tutorial. Use your browser's Back button to return to your previous place in the tutorial.
- Links to pages outside the tutorial open in a separate browser window. To return to the tutorial, close the external link window, or click on the
 tutorial window to make it active.
 KEY CONCEPT
- Key Concepts are elements from the page that are most critical to understanding either the structure or the ability to customize the WebPAC.

Recommended Software and Hardware Settings

• Web browser: Netscape Navigator v.4.5 or above; Internet Explorer v.4.5 or above; Mozilla Firefox 1.5 or above

For optimal viewing:

- Web browser: Netscape Communicator v.6.0 or above; Internet Explorer v.5.5 or above
- Monitor setting: 1024 x 768 resolution or higher, with browser window maximized
- · Colors: at least 256 or higher

Printing

You can print individual tutorial pages and screens from within a Web browser using the 'Print this page' icon



Customers may also download and print this tutorial as a PDF document. To view and print it you need Adobe Acrobat Reader software which you can



URL Links

This tutorial has two types of links - internal and external.

They have distinguishing colors for easy recognition. Internal links are linked within this tutorial and external links lead to outside resources.

Downloading

Animation examples are included on some pages. To view them you need the Flash plugin on your computer. You can download the latest Flash Player from the Adobe <u>Flash Player</u> Download Center. Please ensure that your browser allows popups in order to view the animations. Use playback control to pause, rewind or stop the Flash animation.

Customers who would like to mount this tutorial on a local server for the use of their staff, without having to allow them full access to CSDirect, may download the tutorial as a ZIP (size of ----) file.

After the file has been downloaded and unzipped into the Local directory of choice you will see a list of individual html pages. Double click to open the page called index.html and the tutorial will be accessible. Once it has been downloaded locally, you may choose to open it in a web editor and insert local policies, practices or notes.

Please note that internal links to the *Innovative Guide & Reference* will result in a "page cannot be found" error message since the tutorial uses a relative addressing system. However, the link reference contains the Reference Guide's page number, which can be searched within the customer Millennium server's own version of the Reference Guide.

Please contact us if you have questions, comments or problems.

WebPAC Customization

There are three fundamental elements to consider when customizing the WebPAC. These elements are:

- Presentation the look and feel of the WebPAC.
- Content the information that is displayed in the WebPAC.
- Functionality how things work and the consistency of the results.



How well these elements are integrated will determine the usability of your WebPAC. It is important to understand that these elements often overlap.

For example, a website may be visually attractive (good presentation) but content poor or marginally functional, which would make for a less than adequate user experience. Likewise, a content rich site may not attract as many return visits as it should if it is visually distracting or boring. Simply put, greater usefulness and usability means a higher quality user experience.



- Highly functional, content rich, well presented sites deliver the highest quality user experience.
- All three of these elements should be taken into account when making customizations to the WebPAC. In general, if it's on a browse screen and it's editable, it can be done through a Web Option.

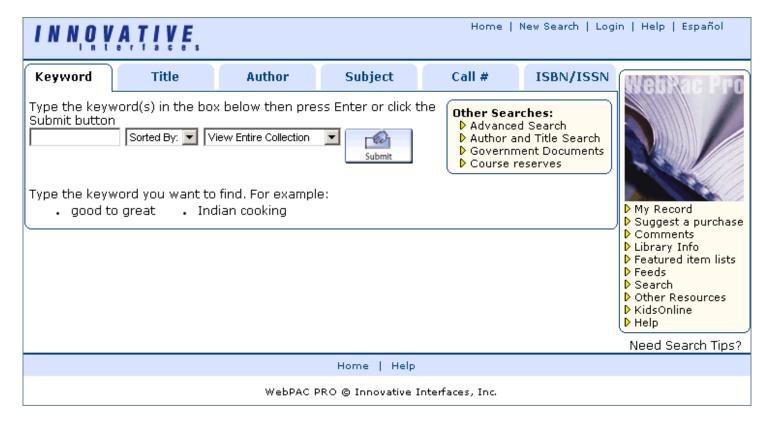
How to begin

For rapid and easy deployment of your library WebPAC, you need only change three elements of the default screens supplied to you: branding, colors and Web Options.

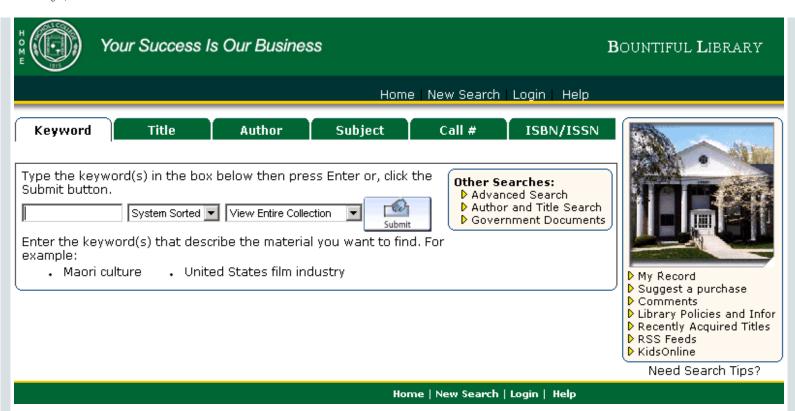
Branding: The original WebPAC screens display the Innovative logos. Replacing these with your library logos, there is an immediate association with your library. Colors: As with the logos, the colors of the WebPAC screens generate an association with your library. The changes are made in one place but affect all the screens.

Web Options: To what features do your patrons have access? What icons represent which functions? Web Options are used to answer these questions and more. Many web features are activated or configured here.

This is the out of the box WebPAC home page:



With a few quick changes to the logo and colors, we get:

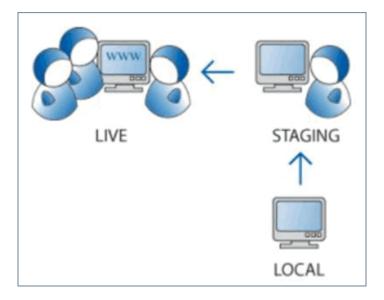


Of course there is more that can be done to customize the WebPAC. However, changing just three basic aspects of the presentation (logo, color scheme, and library image), will yield immediate results for a small investment of your time. This tutorial will teach you how to make these basic changes as well as more advanced ones.

Staging and Live Ports

The WebPAC is a dynamic product that allows your library to offer the community the most current presentation and content. To accomplish this, customization of the WebPAC can be a constant series of updates. Whether the goal is to introduce the WebPAC for the first time or to adopt changes to the existing WebPAC, there is a workflow you can use to ensure the changes you introduce are distributed in a timely fashion with the least margin for error

This image demonstrates the simple yet powerful means for ensuring that patrons view the library catalog exactly the way you intend.



There are two ports available for viewing the WebPAC. Port 80 is the live port that is accessible by patrons. Port 2082 is the staging port or testing ground to see how proposed changes look without exposing those changes to the public. The port number follows a colon (":") when entering the URL address of the library catalog.

For example: http://mylibrary.iii.com: 2082

NOTE: All ports other than the live port must be identified in the IP address. The live port (port 80) is the default and is not required in the IP address.

When you have made a significant number of changes to the staging port and are prepared to transfer the entire directory to the live port, the most efficient method is to Replace Live with Staging via the following path in telnet:

- A > ADDITIONAL system functions
- A > ALTER system parameters
- S > SYSTEM codes
- W > Edit WWW HTML Screens
- L > Replace LIVE With Staging Files

NOTE Running this command is not reversible. Remember to archive the contents of the live directory to recover the older version of the live port.

For additional information, refer to the Innovative Guide & Reference, Page # 105646: Overwriting the Live Directory with the Staging Directory.

If you have made changes to a small number of files on the staging port that you want to go live, use Web Master mode in Millennium Administration to move the file(s) from the staging directory to your desktop and again from your desktop to the live directory.

For additional information, refer to the Innovative Guide & Reference, Page # 106411: Using Web Master.

Example Sets

The Innovative system comes pre-loaded with an example set of HTML files you can use to launch the WebPAC "out of the box." The latest example set is also an excellent starting point for you to use when beginning a re-design of your WebPAC. New example sets are distributed separately and typically more often than the Millennium release cycles.

The pages are available on CSDirect at: WebPAC Example Sets and Photoshop Files.

Along with new example sets, you will also find Change Notes for each set. It is important to read these notes, so that you understand what the new example set can help you accomplish.

File Naming Conventions

There are two categories of html files in Millennium: Customized forms and Custom files or pages.

Customized forms

These files override system-generated pages or display behavior in the WebPAC. They have strict rules for naming that must be followed to ensure proper function.

For additional information, refer to the Innovative Guide & Reference, Page # 106941: Customizable Web Forms.

Two required custom forms are mainmenu.html (the initial page of the catalog) and opacmenu.html (the primary page of the catalog).

Examples:

srchhelp_t.html (title index page)

pverify_web.html (patron verification page)

briefcit.html (defines the brief citation entries in the browse display)

Custom files or pages

These are pages that the library deems as important for inclusion in the WebPAC but are not present in the system-generated pages. Typically, these pages provide additional information to patrons. In this case, you are welcome to name your files according to local convention. It is recommended that you use a naming system that makes it clear to future WebPAC administrators the purpose of the page.

Examples:

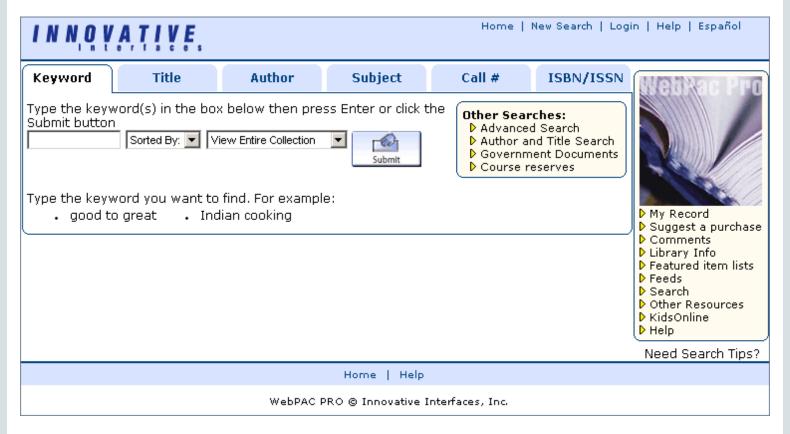
how_to_renew.html

hours.html

friends_of_the_library.html

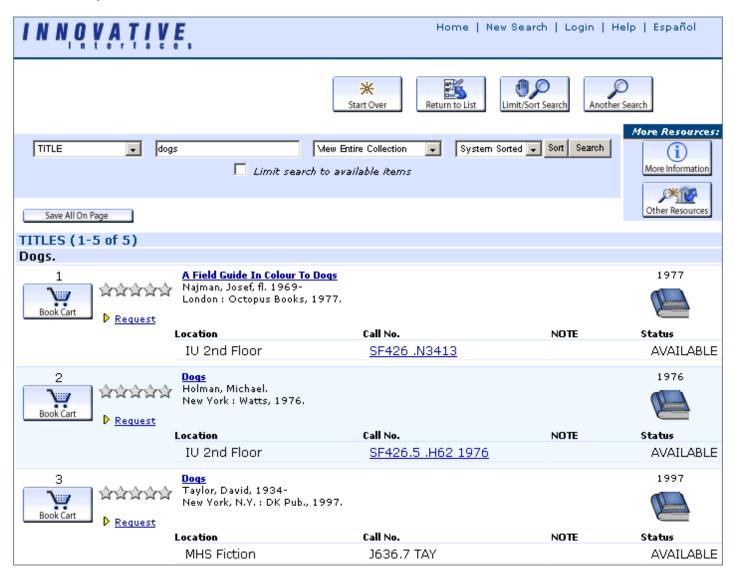
System-Generated vs. Static Page Customization

Most people responsible for updating web pages normally focus on the static pages on the WebPAC. These are the pages that always look the same each time they are viewed until they are edited. For example, the main page of the catalog always looks the same.



mainmenu.html

However, custom forms can be used to customize as well. A good example is the search results page - the information on this page is dependent on the search performed and the data in the system matching the search. The same search performed at different times could produce different results if items are added or removed from the catalog.

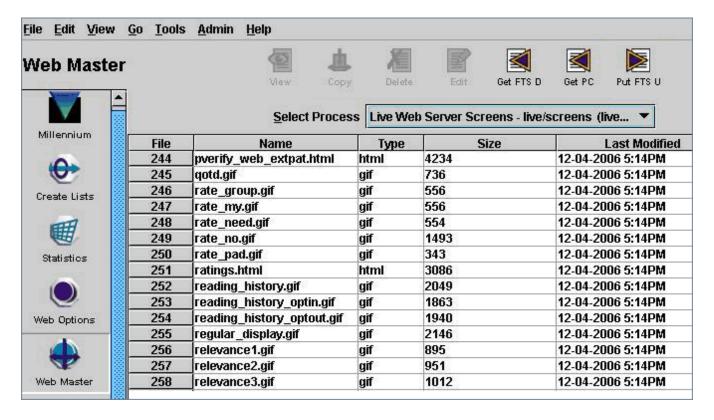


Results page controlled by briefcit.html.

For additional information, refer to the *Innovative Guide & Reference*, Page # 107034: <u>Brief Citation Form</u> and Page # 106854: <u>Bibliographic Record Display Form</u>.

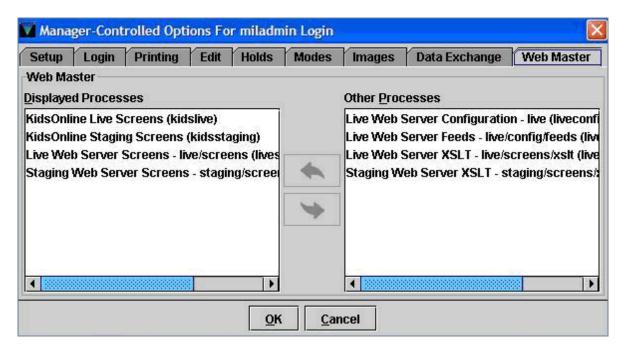
Web Master Mode

Web Master mode is accessed in the Millennium Administration module. It allows users to import files for the WebPAC on Millennium and to export files for archiving. In addition, you can manage files in your directories by creating new files. Existing files can be edited, deleted or renamed.



You must first select a screens directory to work with. This is where the files are stored and retrieved. To choose a directory, use the Select Process drop down. If the directory with which you wish to work is not selectable, you may have to first associate it with your login.

To do this, click on **Admin | Login Manager | < login > | Manager-Controlled Options | Web Master** and ensure that your directory is present under Displayed Processes.

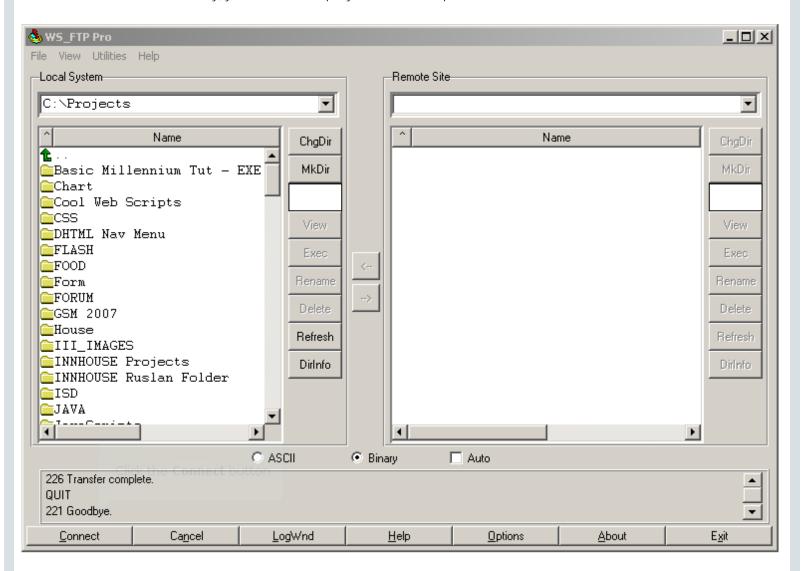


For additional information, refer to the Innovative Guide & Reference, Page # 106411: Using Web Master.

File Transfers

It is highly recommended to keep a copy of your WebPAC files on a machine separate from the Millennium server. This is of particular advantage when using third-party web development software, but also serves as a backup in the event that files are changed.

When moving files in and out of the Millennium server, you can elect to use the File Transfer Software (FTS) functions in Web Master mode of Millennium Administration. Alternatively, you can use a third-party client with FTP capabilities.



If you choose to use Millennium Administration Web Master mode, you can either move files to and from your desktop or to and from a remote server. This has the advantage of conducting all your work in one place.

<fts_icons>

Get PC and Put PC allow you to select one or more files to transfer from your PC. Get FTS and Put FTS allow to select one or more files to transfer from a remote server.

<cap_mil_ftp>

File transfer with many third-party clients has the advantage of a graphical interface (drag and drop); can offer access to multiple servers; can allow users with no Millennium experience to transfer files to and from the Millennium server; and can offer more sophisticated editing tools.

<cap_tpc_ftp>

If file transfer is with a third-party product, then you need to specify the IP address of that server and supply the username and password to access that server. It must not be blocked from the Millennium server via firewall or other means.



Third-party FTP clients must have access to the Millennium server. Provide this access via Limit Network Access Innovative Guide & Reference, Page# 101731: N > Limit NETWORK access.

If you choose to use a third-party client, you need to supply the following details to connect with the Millennium server:

IP: IP address of the server Port: 1021 Username: liveftp (for the live server) or staging (for the staging server) Password: Set in telnet via the pathway.

- A > ADDITIONAL system functions
- A > ALTER system parameters
- S > SYSTEM codes
- W > Edit WWW HTML Screens
- 1 > Change password for 'liveftp' FTP Loading account
- 2 > Change password for 'staging' FTP Loading account

In most cases, the FTP client should be set to passive.

For additional information, please see *Innovative Guide & Reference*, Page# 107049 Setting the Password for FTP Access to the Live and Staging Directories, and Page# 107050 Configuring Non-Innovative Programs for OPAC Maintenance.

10 Most Important Things to Remember about the WebPAC

CONCEPT		
_	Keep your eye on the big picture	
1	Optimizing access to library resources is the goal. Everything else is secondary.	
2	Establish an identity or brand	
	 Should the identity of the library match that of the parent organization? Does it? Create and carry through logos, color schemes and styles Gather these elements before you start to plan specific editing 	
	Learn to be your own detective	
3	Use the resources that are available to you: CSDirect http://csdirect.iii.com Tutorials Customer Information Resources and Training Documents User Manuals Agendas FAQs Innovative Guide & Reference http://yourcatalogIP/manual Innovative Users Group Workshops	
4	Learn to analyze, deconstruct and interpret other libraries' WebPACs Find examples of what you like and then figure out how it was done. If someone else has done it, it is possible.	
	Adjust, don't reinvent	
5	 Use the latest example set on CSDirect as a starting place Keep default file names Use the one directory Keeping with conventions will make for easier upkeep (not to mention with Help Desk troubleshooting) 	
	Use shortcuts when you can	
6	 Use tokens rather than coding where possible Use short forms over long forms Use default pages over customizable where possible 	

7	Pay attention to your data • The WebPAC is an entry point and finding aid for the library's resources, but it can't be better than the underlying data • Data will affect the WebPAC look-and-feel through: • Scoping • Limiting • Indexing • Searching in general
8	 Keep the user in mind Remember, the ultimate goal in WebPAC editing is improving the end user experience Make it simple, friendly Your users (including Reference Staff) will thank you
9	Think about the relationship between the WebPAC and other, related products This includes ones you own now, or might own later It includes products from Innovative and from other vendors
10	Realize the WebPAC is an iterative process It doesn't have to be perfect. A step in the right direction is a good thing. Iterate & improve.

Presentation

Presentation refers to the visual element of your web pages - the look and feel of the pages. This includes the colors, layout, fonts, branding, and images on each page. Out of the box, WebPAC is attractive and well organized, but generic in its overall appearance. This means that at least some customization is desirable. How much customization you do will be determined by the specific branding and design requirements of your library.

THREE FUNDAMENTAL ELEMENTS OF WEBPAC CUSTOMIZATION



This section includes information to help you with editing and maintaining stylesheets, and maintaining the graphics used on various WebPAC Pro pages.

Cascading Style Sheets

WebPAC uses Cascading Style Sheets extensively to control presentation. This makes style sheets a valuable and powerful tool for changing and maintaining the organization-specific branding and presentation of WebPAC pages.



In general, styles "cascade" into the next available style sheet according to the following rules, where number four has the highest priority:

- 1. Browser default
- 2. External style sheet
- 3. Internal style sheet (inside the Head tag)
- 4. Inline style (inside an HTML element)

Different browsers (even different versions of the same browser) interpret and display markup differently. To account for these differences, and to create a greater consistency in presentation, there are two style sheets included in the WebPAC Pro example set: styles.css and ie_styles.css.

A third style sheet, ProStyles.css exists behind the scenes and serves as the WebPAC Pro system default. ProStyles is not accessible or editable by the user. Any style that is defined in ProStyles, can be easily over-ridden in styles.css and/or ie_styles.css, making user access to this file completely unnecessary. These three style sheets are designed to cascade in the following order, where number 3 conditionally has the highest priority:

1. PROSTYLE.CSS	
2. STYLES.CSS	Any style defined in ProStyles.css can be over-ridden in this style sheet
3. IE_STYLES.CSS	This style sheet is only used by Internet Explorer. If IE does not find a style here, it will default to the definition in styles.css



Styles.css is only over-ridden by ie_styles.css when WebPAC Pro pages are viewed using Internet Explorer. If Internet Explorer does not find a style defined in ie_styles.css, it will then cascade to styles.css.

Style Sheet Classes

A number of stylesheet classes, relevant to the display of library-specific data, have been predefined in the stylesheets and included in the default HTML example set. For additional information, refer to the *Innovative Guide & Reference*, Page # 106852: Style Sheet Classes.

A listing of some of the classes is included below. For examples from each class, position your cursor over the class name below.

- General Classes
- Bibliographic Display Classes
- Bookings Display Classes
- Browse Display Classes
- · Patron Record Display Classes
- Request Display Classes

```
General Classes
```

```
.errormessage {font-size: 125%; color: #FF0000;}
.errormessage h2 {display:inline;}
Bibliographic Display Classes
.bibHoldingsLabel {font-size:90%; border-bottom:1px solid #EEEEEE;
border-top:1px solid #EEEEEE;border-left:1px solid #EEEEEE;}
.bibHolds {font-size:90%; border: 1px solid #00437f;}
.bibHoldsEntry { font-size:90%; border: 1px solid #00437f; }
Bookings Display Classes
.bookingsSelect {width: 90%; margin-left: 5%; margin-bottom: 1em;}
.bookingsSelectCal {width: 90%; margin-left: 5%; text-align: center;
background: #00437f; border: 2px solid #00437f; margin-bottom: 1em;}
.bookingsSelectCal table {margin: auto; border: none; font-size: 95%;}
Browse Display Classes
.browseEntry td {border-top:1px solid #d7e3ff;}
.browseEntryData {text-align: left;}
.browseEntryEntries {text-align: center;}
Patron Record Display Classes
.patFunc {border-top: 2px solid #00437f; border-spacing: 0; width: 100%;}
.patFunc td {padding: 5px; font-size: 90%; border-bottom: 1px solid #00437f;}
.patFuncArea {border: 2px solid #00437f; margin: 3px;}
.patFuncArea form {display: inline;}
Request Display Classes
.reqFillTimeMsg {font-style: italic; font-size: 90%;}
```

Of these classes, the General, Bibliographic Display, and Browse Display Classes will be of greatest immediate interest when making changes to your WebPAC pages. Additionally, as new example sets are developed, new style classes are defined. For example, with the Pro example sets new style sheet classes were introduced to describe the appearance of tabs. Below is an example from styles.css, with the background color highlighted. This is an element you may wish to change when you customize your pages.

/*styles for bib_display.html */

```
.raised .b2 {background:#d7e3ff; border-left:1px solid #fff; border-right:1px solid #eee;}
.raised .b3 {background:#d7e3ff; border-left:1px solid #fff; border-right:1px solid #ddd;}
.raised .b4 {background:#d7e3ff; border-left:1px solid #fff; border-right:1px solid #aaa;}
.raised .b4b {background:#d7e3ff; border-left:1px solid #eee; border-right:1px solid #999;}
.raised .b3b {background:#d7e3ff; border-left:1px solid #ddd; border-right:1px solid #999;}
.raised .b2b {background:#d7e3ff; border-left:1px solid #aaa; border-right:1px solid #999;}
.bibTabContent {width:100px;background-color:#d7e3ff; text-align:center;
    padding:5px 0 5px 0;height:15px; }
```

DIVs

A DIV is a logical **div** ision on a page. It makes an easy way to apply styles uniformly to various sections of a page. For example, toplogo.html uses dive to create the uniform banner area at the top of every page.

```
</-- begin toplogo.html file -->
</-- 2006 WebPAC Pro Version, set from 26 March, 2007 -->
<!-- This file last changed: 9 February, 2007 -->
<div id="topLogohead">
<div id="topID">
   <div align="right">
       <l
           <a href="/">Home</a>
           class="breaker">|
           <a href="/search">New Search</a>
           class="breaker">|
           <a href="/patroninfo">Login</a>
           class="breaker">|
           <a href="/screens/help index.html">Help</a>
       </div>
</div>
<div style="float:left;">
   <div id="topLogoImage"><a href="/"><img src="/screens/logo.gif"</pre>
   width="171" height="27" border="0" alt="Return to home page" /></a></div>
</div>
<div style="clear:both;"></div>
</div>
</--end toplogo.html-->
```

Below are the style elements that are used in toplogo.html.

```
#topLogohead {background-color:#d7e3ff; padding:3px 5px 3px 5px;
margin:0 0 10px 0;border-bottom:2px solid #00437F;}
#topLogoImage {padding:5px 3px 5px 5px ;}
#topID {float:right;}
#topID ul {list-style:none; font-size:.7em; padding:0; margin:0 0 5px 0;
#topID ul li {display:inline; padding:0 2px 0 0;}
#topID ul li a {text-decoration:none; color:#00437F;}
#topID ul li a:hover {text-decoration:underline; color:#00437F;}
#topID .breaker {color:#00437F;}
```

TIP: Divs can be nested inside of one another so that styles defined at a higher level can be "inherited" by elements within them. Paragraphs, on the other hand, mark areas of text, so are specific to text-related style. This means that you can enclose a paragraph inside of a div, but you can't enclose a div inside of a paragraph.

Classes and IDs

In general, an ID is more specific than a class is. Without going into exhaustive detail, here are some basics:

- IDs begin with a hash mark (#) as in #topLogohead
- Classes begin with a period (.) as in .topLog input {font-size:.7em;}
- To specifically associate classes with an ID, you can use an ID/Class "combo" as in #topID .breaker {color: #00437F;}
- . IDs take priority over classes.
- An ID should only be used once per page, while a class can be used as many times as needed.

Pseudo classes

Pseudo classes are directly attached to selectors and use a colon in between the selector and the pseudo class. They take the form selector: pseudo class {property: value;} They are used to specify a state or relation to the selector.

Here is an example from styles.css where the anchor selector (a) is paired with various pseudo classes to describe the anchor state:

/*traditional link colors are suggested for better usability */

```
a:link {color: #000099;}
a:active {color: #993399;}
a:visited {color: #993399;}
a:hover {color: #993399;}
A.pageNavAreaText:LINK, A.pageNavAreaText:VISITED
{color: #FFFFFF; text-decoration: none; font-weight: bold; background-color: #00437f;}
A.pageNavAreaText:ACTIVE, A.pageNavAreaText:HOVER
{color: #FFF8EF; text-decoration: none; font-weight: bold; background-color: #00437f;}
```

Editing Style Sheets

The following examples illustrate how a few, simple edits to the style sheet can easily change the look of WebPAC. Examples 1 and 2 include some highlights of the changed elements from styles.css used to create the customized presentations.

Example 1

"Out of the box", with no changes or additional styles applied.



Example 2

Simple branding applied: page title, library logo, and basic color scheme.

Submit

Maori culture

STORM ISLAND PUBLIC LIBRARY

Man cannot discover new oceans unless he has the courage to lose sight of the shore.

Andre Gide

Subject Call # ISBN/ISSN Author

Type the keyword(s) in the box below then press Enter or, click the

New Zealand film industry

Type the keyword you want to find. For example:

System Sorted View Entire Collection

Other Searches:

- Advanced Search
- Author and Title Search
- ▶ Government Documents



- My Record
- Suggest a purchase
- Comments
- Library Policies
- D Recently Acquired Titles
- RSS Feeds
- ▶ KidsOnline

Need Search Tips?

Home | New Search | Login | Help

```
#white a {text-decoration:none; color:#ffffff;}
#white a:hover {text-decoration;underline; color:#000000;}
#white a:visited {text-decoration:none; color: #ffffff}}
#white a:active {text-decoration:none; color: #ffffff}}
#botnavigate {background: #996600; margin: 0 0 15px 0; font-size:80%; color:#ffffff;
font-weight:bold; padding:5px 0 5px 0; text-align:center;
border-top:2px solid #333333;}
p.main {color:#ffffff; font-variant:small-caps; font-family:Tahoma, Arial;
font-weight:bold; margin:1px 0 1px 3px;}
p.head {color: #ffffff; font-variant: small-caps; font-family: Tahoma, Arial; font-weight: bold;
font-size:110%; text-align:center; margin:0 0 0 0}
span.topstyle {color: #ffffff; font-variant: small-caps; font-family: Times, Tahoma, Arial;
font-size:150%; padding: 0 0 0 5px; margin:10px 0 0 10px;}
p.quotestyle {color: #ffffff; font-style: italic; font-family:Times, Tahoma, Arial; font-size:90%;
margin:5px 15px 5px 15px; indent: 5px;}
span.quotestyle2 {color: #ffffff; font-style: italic; font-family:Times, Tahoma, Arial; font-size:90%;
float:right; margin: 0 10px 5px 10px;}
/* styles that create the toplogo area of the page */
table.banner {width:100%; margin-bottom:10px; padding 0 0 5px 0; border:0; cellspacing:0}
tr.bg {background-image:url('/screens/storm-island.jpg')}
td.backleft {background-image:url('/screens/storm-island.jpg')}
td.backcenter {background-image:url('/screens/saturn_detail.jpg')}
td.backright {background-image:url('/screens/prairie3.jpg')}
/* styles that control color and size of tabs */
```

```
div.DisplayBoxContent div a {color: #ffffff;text-decoration:none; font-weight;bold; outline:none;}
div.DisplayBoxContent div {color: #000;text-decoration:none; font-weight:bold; outline:none;}
div.DisplayBoxContent div a:hover {text-decoration:underline; font-weight:bold;outline:none;}
.mainActiveTab {background: transparent; float:left; margin:0 5px -1px 0;}
.mainInactiveTab {background: transparent; float:left; margin:0 5px 0 0;}
.mainInactiveTab2 {background: transparent; float:left; margin:0 5px 0 0;}
.menuTabContent1 {width:100px;background-color: #996600; text-align:center;
padding:1px 0 5px 0; height:17px;}
.menuTabContent2 {width:125px;background-color: #996600; text-align:center; padding:1px 0 5px 0;
height:17px;}
.menuTabActive {width:100px;background-color: #fff; text-align:center; padding:1px 0 5px 0;
border-left:1px solid #00437F; border-right:1px solid #333333; height:20px; margin:0 0 0 0; }
.inactive2, .inactive3, .inactive4 {background: #996600;}
```

Example 3

Search Tips

RSS Feeds

SUGGESTIONS

Featured item lists

Suggest a purchase

Other Suggestions

Additional styles applied to coordinate colors and change position of links.

INNOVATIVE INSTITUTE OF ART

MILLENNIUM LIBRARY CATALOG

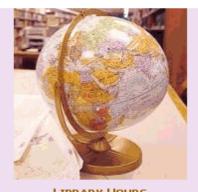




Type the keywords you want to find. For example:

bauhaus photographs

design elements



LIBRARY HOURS MONDAY - THURSDAY ▶ 7:00am to 7:00pm FRIDAY ▶ 8:00am to 5:00pm

SATURDAY

▶ 10:00am to 4:00pm SUNDAY

Closed, except during exams.

Home | New Search | Login | Help

```
#white a {text-decoration:none; color:#ffffff;}
#white a:hover {text-decoration:underline; color:#000000;}
#white a:visited {text-decoration:none; color: #ffffff}
#white a:active {text-decoration:none; color: #ffffff}}
#botnavigate {background: #DAC6E2; margin: 0.0 5px 0; font-size:80%; padding:5px 0.5px 0;
text-align:center; border-top:2px solid #67337B;}
p.main {color: #ffffff; font-variant: small-caps; font-family: Tahoma, Arial; font-weight: bold;
margin:1px 0 1px 3px;}
p.head {color: #996600; font-variant: small-caps; font-family: Tahoma, Arial; font-weight: bold;
font-size:110%; text-align:center; margin:0 0 0 0}
p.topstyle {color: #996600; font-variant: small-caps; font-family: Tahoma, Arial; font-size: 200%;
text-align:center; padding: 0 0 0 0; margin:5px 0 0 0;}
p.hours {color: #000000; font-variant: small-caps; font-family: Tahoma, Arial; font-weight: bold;
margin: 0.0.4px;
p.instruct {color:#000000; font-size:95%; margin:0 0 0 4px;}
img.framed {border:1px 1px 1px 1px; color:#DAC6E2; align:center; margin:15px 0 0 4px;}
```

Graphics Overview

Graphics and images are an important part of a visual medium such as web pages. They help to contribute to branding and create a unified look and feel to pages. Besides being visually attractive, images can help the user to more quickly process the information displayed on a page.

For example, an image of a book next to a title tells the user they have retrieved a record for a book, and not a CD or DVD.

Here are some tips to remember when working with graphics:

- Graphics are stored in the screens directory with html pages.
- Graphics can be easily replaced.
- Naming is important for some images, especially those used to represent material-types (i.e. media_book.gif).
- Use clear, unambiguous images to represent material types.
- Keep images small in file size to help pages load quickly.

For additional information, refer to the Innovative Guide & Reference, Page # 106916: Graphic Buttons.

Toplogo and Botlogo

Toplogo.html creates the banner that appears at the top of each WebPAC Pro page in the example page set.

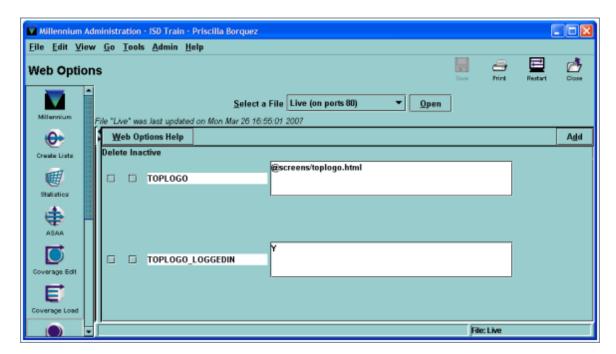
```
INNOVATIVE.

Home | New Search | Login | Help
```

This simple file makes it easy to maintain a uniform look throughout your pages. An example of the file is shown below.

```
| Color | Colo
```

The file name is set using Web Options, as shown below.



Toplogo.html is included in WebPAC pages by using the toplogo token, as shown below.

```
mainmenu.html - Notepad

Ele Edit Format View Help

else if (document.layers)
{
  var style2 = document.layers[whichLayer].style;
  style2.display = style2.display? "":"block";
}
  </script>
  </head>
  <body onload="document.forms[0].elements[0].focus();">
  <!--{toplogo}-->
```

You can easily swap the default graphic for one used by your library. Remember to change the size declaration if it differs, and change the ALT value. An example is shown below.

Default entry:

<div id="topLogoImage"></div>

Edited entry:

<div id="topLogoImage"></div>



It is important to remember that toplogo.html is read once at startup. This means that any changes to this file require a restart in order for the changes to take effect.

For additional information, refer to the Innovative Guide & Reference, Page # 106411: Using Web Master, and Page # 106807: Updating Web Options.

Botlogo.html is similar in construction to toplogo.html, except that, by default, it contains no graphics.

Buttons and Icons

In WebPAC Pro, buttons are used extensively for such actions as submitting searches, canceling actions, and changing the record view (from regular to MARC, for example). The Web Options used to designate which image and/or text to associate with an action begin with **BUT_** and **ICON_**.

BUT_ Web Options provide an easy way to designate a specific image to use for an action. All BUT_ Web Options accept a path and graphic file name as their value, as in this example:

BUT_PAT_CANCELALL /screens/pat_cancelall.gif

This option tells WebPAC that the image, named pat_cancelall.gif, is located in the screens directory. In-line style elements can be added to the resulting image tag, as shown below. Note the closing quote mark is omitted from the style declaration.

BUT_ PAT_CANCELALL /screens/pat_cancelall.gif" style="display:none

ICON_ Web Options provide a simplified way to format the HTML image tag associated with specific links.

All ICON_ Web Options have values in HTML, defining either the text or an image to use as the link, as in the following example:

<img src="/screens/cancel.gif" alt="Cancel" border="0"
 class="button" />

ICON_ Web Options may also have a combination of an image and text, as in the following example:

CON_856LINK Website

A few images may occur as both BUT_ and ICON_ Web Options, as shown in the example below.

<img src="/screens/submit.gif" alt="Submit" border="0"
class="button" />

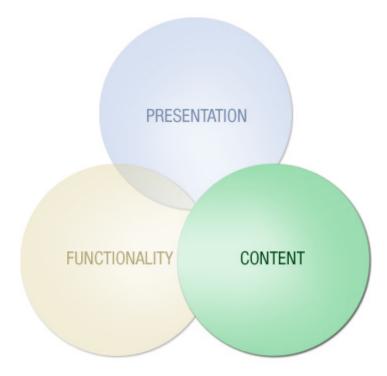
BUT_SUBMIT /screens/submit.gif

In these cases, the older BUT_ Web Option will eventually be completely replaced by the ICON_ Web Option.

Content

Content is the information from your Millennium records that you display in the WebPAC. This section deals with the tools that you make available to your users in order to find the record or records that will satisfy their searching requirements. We'll cover such things as scoping, search limits, and indexes. We'll also look at how you can customize your users' search results so that they get the most useful information.

THREE FUNDAMENTAL ELEMENTS OF WEBPAC CUSTOMIZATION

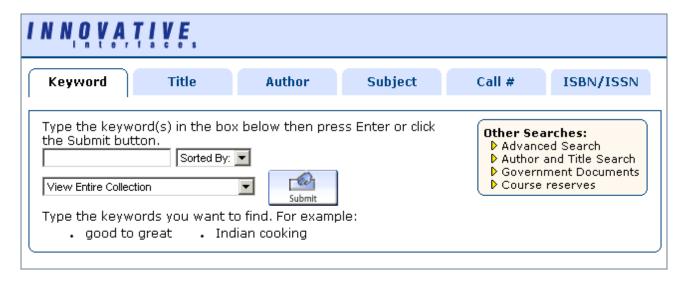


While discussing content, it is also useful to think about where your web pages might be hosted. Some libraries decide to keep their entry page on a separate server with a re-direct to the library catalog's home page (i.e. mainmenu.html). Others choose to keep everything on the catalog server. When making this decision, keep in mind that your content, the records in your catalog, are on the catalog server. When the catalog server is up and running, your web pages will lead to effective searching. If you choose to host your entry page on a separate server, keep in mind that if the other server goes down, maybe even for just maintenance, your entry page may be lost.

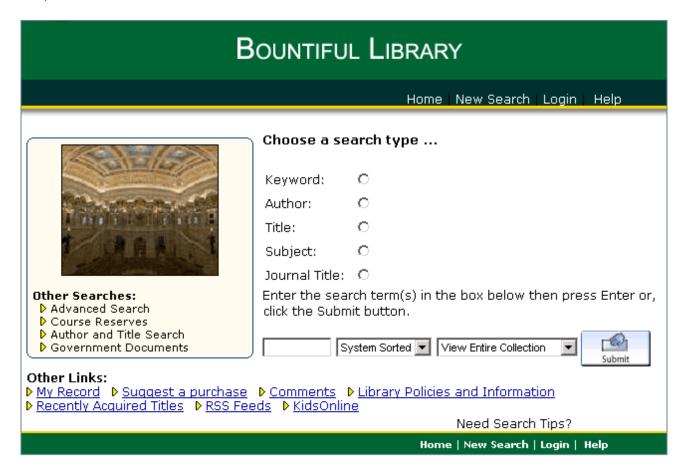
If your library is using scope menus, then this decision is made for you, as you will have to have the entry page on the catalog web server in order for it to work properly.

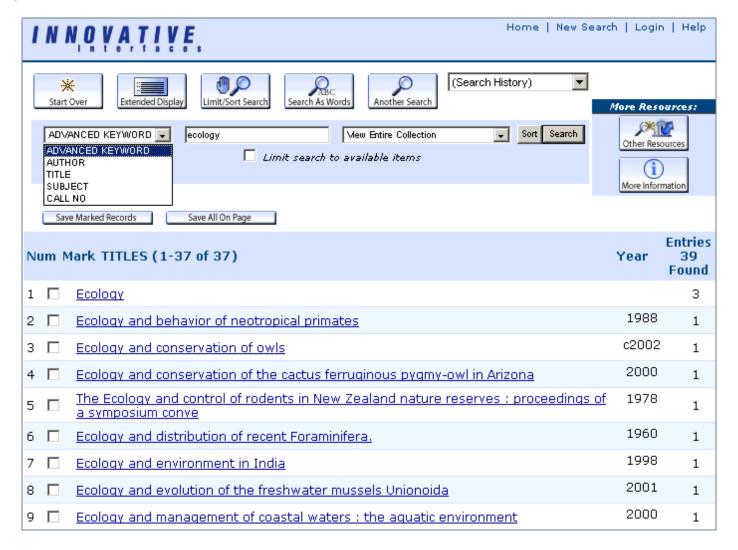
Indexes

Indexes can be presented in many different ways in the WebPAC. Any index you have created for searching your collection can be made available in the WebPAC, even if it is not currently available (the default set up shows only a few of the most common indexes). You can choose how you would like these indexes to display by using drop-down menus, radio buttons, tabs, links, icons or a combination of these types.



On this page (mainmenu.html) the most common indexes have been separated by tabs, with Keyword searching set as the default. Less common indexes are available in the "Other Searches" box. Once your library has determined which indexes are most useful for your patrons, you can change this default set up.





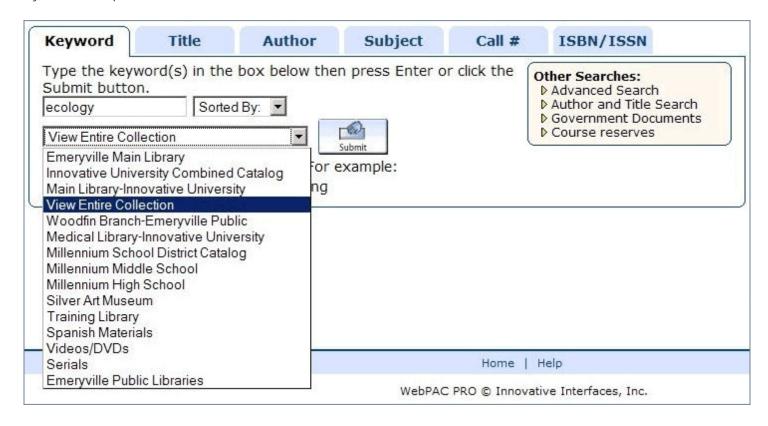
Search results pages each have a drop down menu that allows users to change the index being searched.

NOTE: When presenting your indexes you can have a different look and feel between basic and advanced search pages. For example, tabs may be available for the most common indexes like Title, Author, Subject and Keyword. The advanced search interface can then be the place that presents other indexes such as Call Number and ISBN/ISSN.

Scoping

The scoping product allows patrons to search the WebPAC and get results back for a specific location, material type, language, etc.

For example, a search may be for a title that specifically has to be a video recording found it the Main library branch. Scoping acts as a pre-search limit so only hits with the specific criteria selected are returned.



In this example a keyword search can be limited to a specific library or material type. The <!--{scope}--> token is being used on mainmenu.html.

Scoping also allows you to design different WebPAC pages for each scope, essentially giving the ability to have several different catalogs within the one. This can be especially useful for consortiums and multi-branch libraries. Common scopes include those by location, so patrons can retrieve only records belonging to the branch they specify (e.g. North Branch), and by material type, which allows a patron to limit a search to a library's specific collection (e.g. music).

There are two parts to scoping:

- You must have purchased the scoping product, and have built scopes around your data. Scoped searches are only as good as the data in the catalog. Using location codes and other criteria, your library can work with Innovative to create the scopes that will be most useful to your users.
- 2. You must also make scopes visible and searchable in your WebPAC. This can be accomplished by using dropdown lists with different scope options (such as a list of material types) or by an entry page that links off to scoped sections of the catalog. Once the user selects a link to a scoped page, they can continue searching that scope until they reset their criteria. This is accomplished by using the Web Master mode to set up scoped pages, and Web Options to determine exactly how you would like those scoped pages to behave.

Staff can also set up scoped logins and terminals to limit the database searches to a particular scope defined by that login or terminal, preventing users from changing the current scope.

For additional information, refer to the Innovative Guide & Reference, Page # 106715: Scoping Overview.

For additional information, refer to the Innovative Guide & Reference, Page # 101275: Scoping Maintenance.

For additional information, refer to the Innovative Guide & Reference, Page # 101277: Maintaining the Scope Menu.

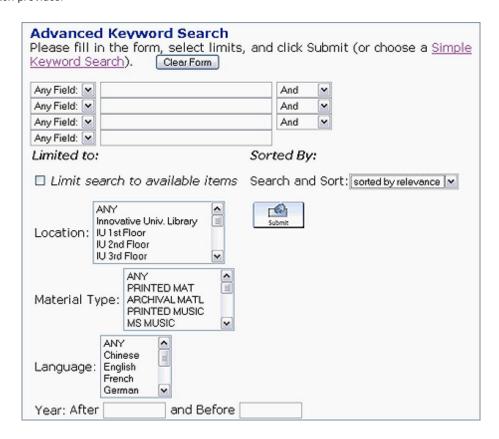
For additional information, refer to the Innovative Guide & Reference, Page # 106827: Using Scoped Searching in the WebPAC.

Search Limiting and Sorting

Search Limiting: You can restrict the number of records that will be retrieved by limiting any search. This can be used in conjunction with a scoped search, allowing users to have a more specific search executed based on parameters from the bibliographic record such as:

- year of publication
- publisher
- · words in the title
- author
- · subject fields
- location
- language
- · material type

You may use the default Advanced Boolean Search Help page (srchhelp_X.html), which includes pre-search limiting. There are many tokens that can be used in this and other search help pages to limit a search. Some of the advantages of using the Innovative created tokens are that there is less HTML coding to maintain, and the tokens are easy to add or remove. It is possible to replace the tokens with your own coding if you'd like something different than what the token provides.

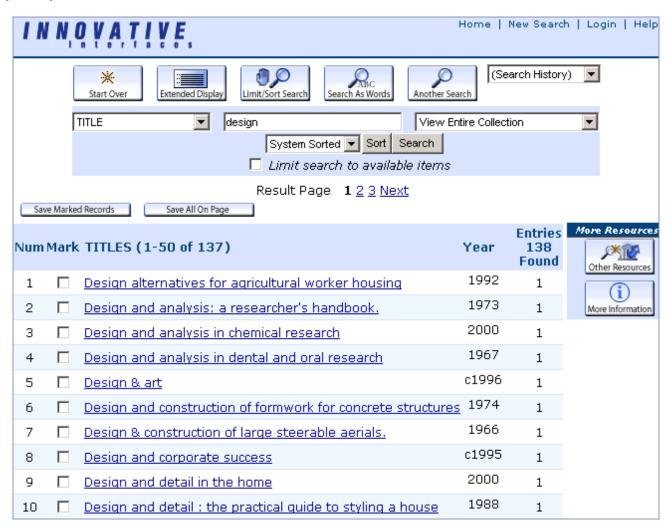


You can sort the results of your search in a number of ways, so that your patrons have flexibility in how they view their results. The system sort is title based, using the first title field from the record. You also have the option to sort based on date or relevance. Date sorting is based on the publication date of the item, while relevance uses the search expression the patron has just typed.

NOTE: You can see the HTML that was generated by a token by selecting View - Page Source from your browser. Instead of seeing the token (as you do when viewing and editing the page in Web Master) you will see a section of HTML. You may be able to use this HTML as a starting point for creating your own coding. However, Innovative recommends using tokens whenever possible, for consistency and ease of use.

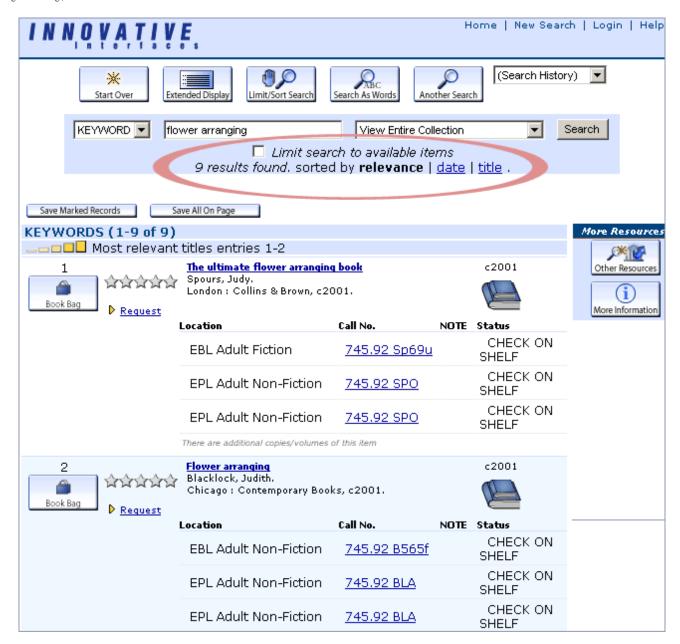
Search Sorting: It is possible to sort the display of records in the WebPAC before or after a search is performed. There are different sort options for phrase searching than for keyword searching.

Phrase Search Sorting: This is controlled by the SORT_BROWSE web option, where your library can define the types of sorting criteria you'd like to make available to your users.



For additional information about this Web Option, refer to the Innovative Guide & Reference Page # 106872: Search Results Options

Keyword Search Sorting: RightResult keyword searching allows users to sort by Date, Title, or Relevance. The system automatically sorts by Relevance, based on the RightResult algorithm.



For additional information, refer to the Innovative Guide & Reference, Page # 107132: Sorting Results in the Browse Display

For additional information, refer to the Innovative Guide & Reference, Page # 106866: Using Advanced Searching in the OPAC.

For additional information, refer to the Innovative Guide & Reference, Page # 107133: Advanced Boolean Search Help Page.

For additional information, refer to the Innovative Guide & Reference, Page # 106892: Limiting Searches in the WebPAC.

Search Results

Whenever a user submits a search, Millennium will retrieve a system-generated page. These pages are not static HTML pages, and cannot be customized in the same way as other pages (mainmenu.html for example). These pages can be customized using Web Options, specialized HTML pages, and style sheets. The format of the page that is returned depends on the results of the search.

The system will always resolve a search to the lowest possible level. If the system can return a single record to satisfy the search, it will. If not, it will attempt to return a list of records, and if it can not accomplish that, it will retrieve a list of headings for the user to browse. If no match can be found, such as in the case of a spelling error, the system will either return a page that shows where the search term would be if it were indexed, or it will return an advanced search page to allow the user to alter their search.

As you navigate through the next few pages, please keep in mind the different types of results pages that the system will offer. From most general to most specific, they are Index browse, Record browse, and Bibliographic display.

Phrase Index

Phrase indexes are indexed left to right as a phrase, with automatic truncation. Depending on how many hits are retrieved from a WebPAC search, a user will see a headings browse screen, a record browse screen, a bibliographic record, or a no headings retrieved page. All indexes except the Keyword index are phrase indexes. The most common are Title, Author, and Subject. The following pages discuss phrase index searching and search results

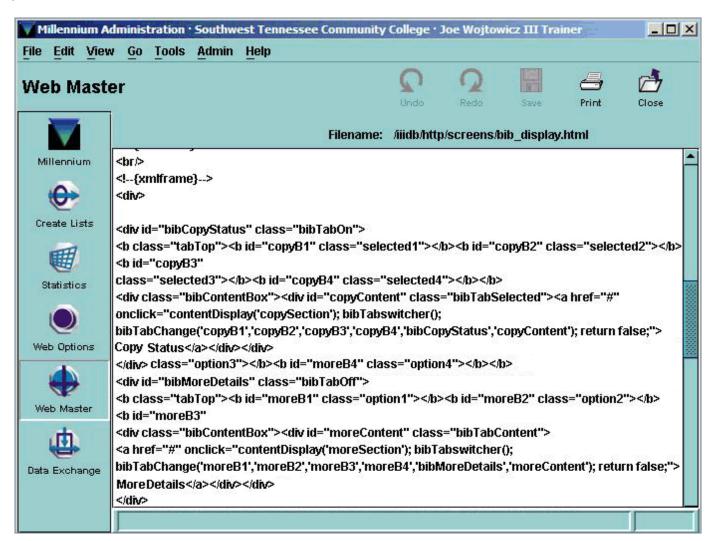
Direct Hit

When the search terms entered retrieve a single record, the WebPAC defaults to the bibliographic record display. This is a system-generated page, which means that the look and feel is controlled largely by style sheets and Web Options. Certain aspects of the bibliographic record display are also controlled by bib_display.html, a file that is stored in the screens directory.

In the example below, a summary display of the bibliographic record is displayed directly above a series of tabs. The first and default tab displays item information, while the other tabs display additional bibliographic information. These tabs are specified in bib_display.html. This file can be modified to add or remove tabs, or to change the header text for each of the tabs.



bib_display.html is a file that controls the look of the page you're seeing above. There are a number of different elements that make up this page, including div ids that specify tabs on the page such as Copy Status, More Details, and Find Similar Items. Below is a portion of the Bib_display.html file showing the Copy Status div id.



It is also possible to get a direct hit on an authority record. If a user searches for a name or subject that does not match on a bibliographic record, but is a variant name or subject in an authority record, the WebPAC will display an authority redirect message. The authority file is used in the WebPAC to help your users find the established form of a name, title, or subject, so they can successfully execute a search for desired materials.

Here is an example of a direct hit on a name authority record. Note that the user only needs to click on the established form of the name to execute a new author search:



The message that appears for redirect messages depends on the data in your authority records. If the search term is a related but valid heading, users will get a "See also" redirect message. If they have searched on an invalid heading they will get a "See" redirect message.

For additional information, refer to the Innovative Guide & Reference, Page # 106870: Viewing See References in the OPAC.

For additional information, refer to the Innovative Guide & Reference, Page # 106871: Viewing See Also References in the OPAC.

Index Browse

Index browse results occur on any phrase search (not available on keyword searches) that returns more than one heading.

NOTE: if only one heading is retrieved the screen will go to a record browse, if only one record is retrieved that record will be displayed.

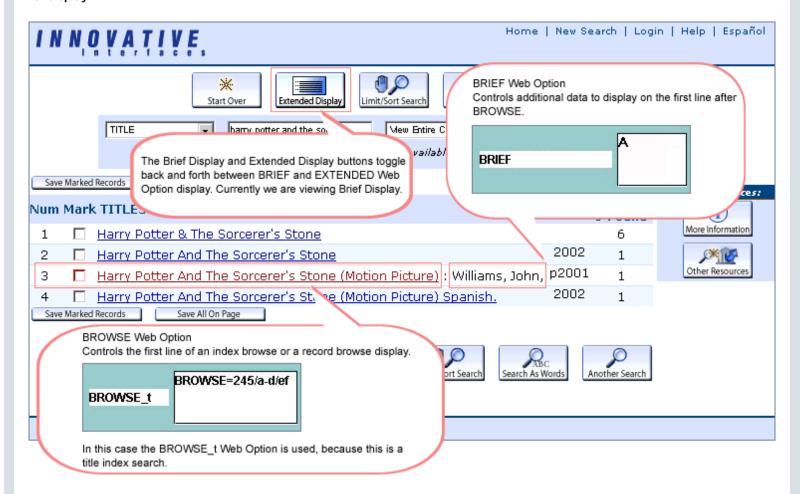
The index browse shows a list of retrieved headings with the number of records found that match each heading. The display of index browse pages is determined by your style sheets and by Web Options.

Brief and Extended Web Options:

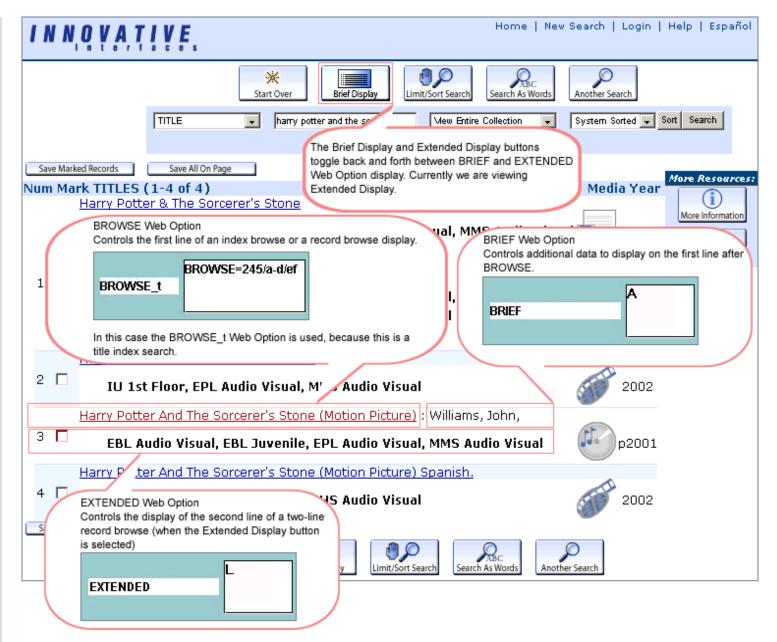
Index browse has two modes: Brief and Extended .

Brief has results with the same heading grouped together. In the Extended display, each title is listed separately. While Brief is the default display, your library can opt to change the default to Extended, if desired. There is a button on the results page that will allow your patrons to toggle between the Brief and Extended displays. The Brief and Extended Web Options control the fields from each record that display on an index browse page.

Brief display:

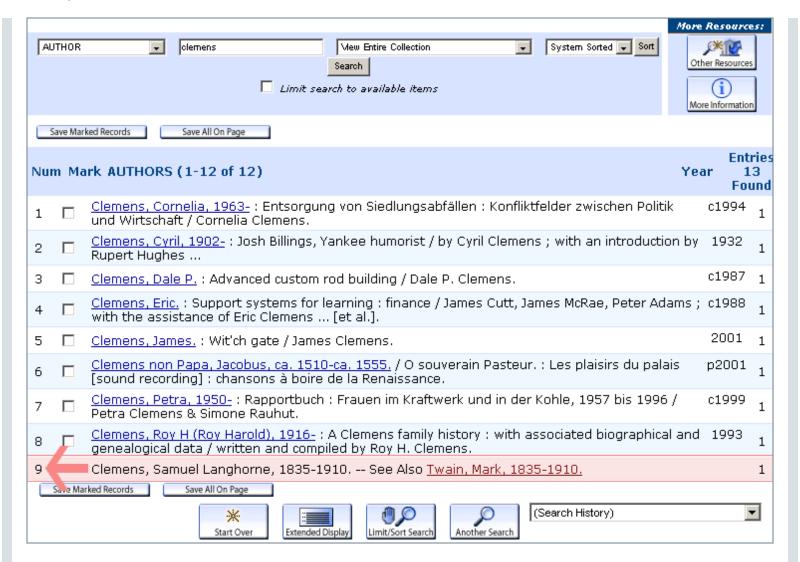


Extended Display:



For more information on Web Options, please see the <u>WWWOptions</u> page.

"It is also possible to see authority redirect messages in index browse screens. When a user performs a phrase search in which a satisfier is found in an authority record, and is not found in a bibliographic record, they will see an entry redirecting them to the correct or authorized version of that name, title, or subject. In this example, entry 9 shows an authority record for Mark Twain. The user searched in the author index for "clemens", and the name "clemens" is found as an alternate name in the Mark Twain name authority record. The WebPAC then inserts a message telling the user that Samuel Clemens is not used in this catalog - if that is who they are looking for they'll need to click the link to search for Mark Twain instead:



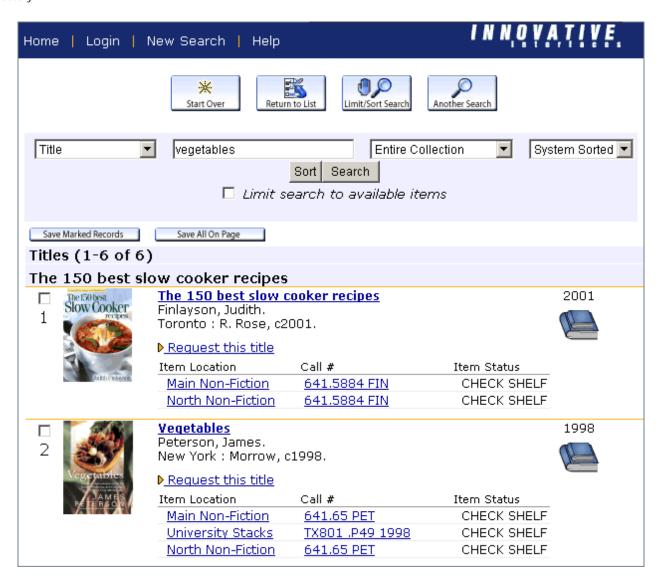
The message that appears for redirect messages depends on the data in your authority records. If the search term is a related but valid heading, users will get a "See also" redirect message. If they have searched on an invalid heading they will get a "See" redirect message.

For additional information, refer to the Innovative Guide & Reference, Page # 106870: Viewing See References in the OPAC.

For additional information, refer to the Innovative Guide & Reference, Page # 106871: Viewing See Also References in the OPAC.

Record Browse

Record browse pages display when multiple results are retrieved from a keyword search (rather than a direct hit), or when a phrase search returns a set of records that are under the same heading. The record browse display is a system generated page, which is controlled by briefcit.html, a file in the screens directory:



briefcit.html is the file that controls the Record Browse display in the WebPAC.

This file utilizes a number of \underline{tokens} , such as <!--{linkfieldspec: Vbt245ab}--> and <!--{request}-->.

The <!--{request}--> token inserts a link next to each item that allows the user to request (place a hold) on that item.

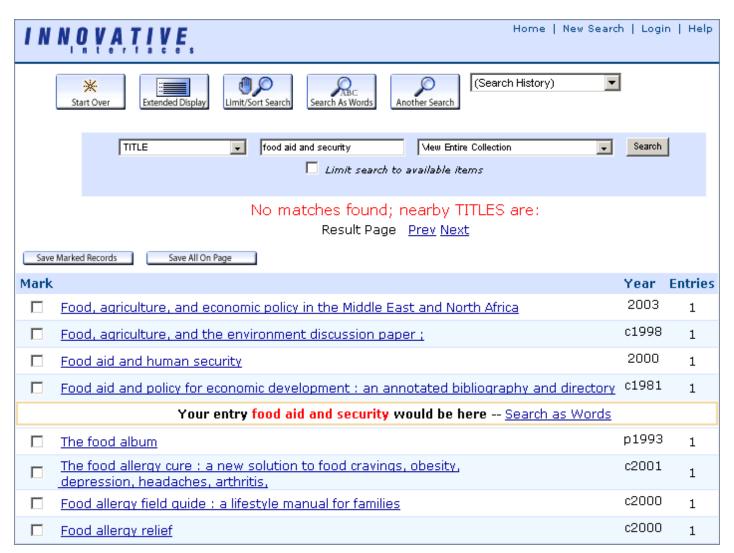
The <!--{linkfieldspec: Vbt245ab}--> token controls which fields display as an HTML hyperlink to the full record display. In this example, the variable field(*V *), from the Bibliographic record(*b *) that will display as a hyperlink is the MARC field 245, specifically the sub-fields a and b (*245ab*).

No Hits

Display in the WebPAC with no hits:

Even if the search terms entered retrieve no records, Millennium will always retrieve some type of result. In the case of a phrase search such as a title or author, the user is offered a list of headings alphabetically before and after the search terms.

The "no headings retrieved page" is an index browse page, so the look and feel will be determined by the same Web Options as any other index browse page:

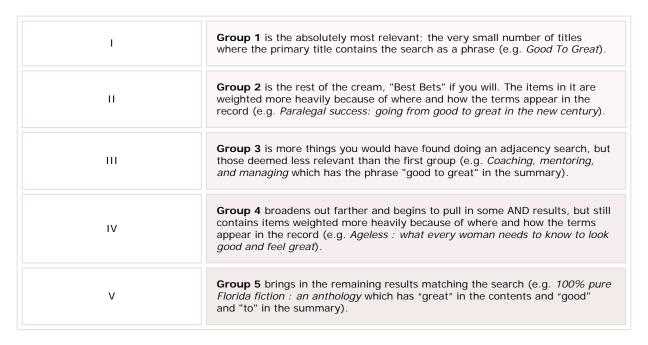


When the user performs a keyword search using a word that is not indexed in the database, they will be taken to the <u>Advanced Keyword Search form</u>, so they can review their term and perform another search:

Keyword	Title	Author	Subject	Call #	ISBN/ISSN	
	Advanced Keyword Search					
	NO ENTRIES FOUND					
Did you mean <u>plasticity</u> ? <u>more »</u> Please fill in the form, select limits, and click Submit (or choose a <u>Simple Keyword Search</u>). Clear Form						
Any Field: 💌	olasticitys	[4	And 🔻			
Any Field: 💌		[4	And 🔻			
Any Field: 💌			And 🔻			
Any Field: 💌						
Limited to:			Sorted Bv:			
Limit search to available items			Search and Sort: sorted by relevance			
Location: Ini	NY neryville Public Library novative Univ. Medical novative Univ. Library neryville Branch Library	, •	Submit			
Material Typ	ANY UNKNOWN e: BOOKS ARCHIVAL MATL PRINTED MUSIC	A				
Language:	ANY French English German					
Year: After	and (Before				
Publisher:						

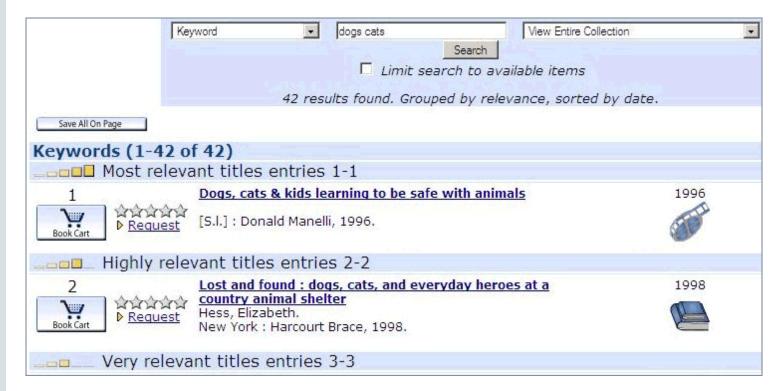
Keyword Index: RightResult

With RightResult technology, keyword searches in WebPAC Pro display search results using a relevance grouping to indicate how closely each item in the results list matches the search target. Retrieved records are relevance ranked in up to 5 groups depending on search results:



All groups are ordered by your default Keyword sort order (Alpha/Date/Relevance).

Here are the top records retrieved with the search terms **dogs cats**:



If no results are found in these groups, the system can still fall back to an OR search:



In this case no results are found that contain the search terms in a phrase (**Versailles France weather**) or all of the search terms somewhere in the record (**Versailles** AND **France** AND **weather**). Since no results are found in any of the RightResult groups, a search for **Versailles** OR **France** OR **weather** is executed, retrieving the records in the database that most closely match the given search terms.

Functionality

This section of the tutorial discusses the elements of the WebPAC design that deal with functionality: that make the WebPAC work! Functionality addresses the following questions:

Which indexes are available for searching? Which fields are displaying in browse screens? Where and how do patrons log into their records or account? What can patrons do in their record? Where or how can system generated pages be edited?

THREE FUNDAMENTAL ELEMENTS OF WEBPAC CUSTOMIZATION



WebPAC editing is via any of the following elements: Web Options, library customizable HTML pages and forms, tokens, command links, and features.

Web Options

Web Options are system options that control many aspects of the WebPAC. They are often referred to as wwwoptions.

They are listed in the Innovative Guide and Reference in alphabetical order and are also grouped according to their function. Web Options contain values in various formats and having Innovative Guide and Reference pages readily available is highly recommended (if not essential) when you are working with Web Options. The only common denominator among the multitude of Web Options, excluding added extensions, is that they must all be in UPPER CASE. There may be added extensions for indexes, patron types, scopes and languages.

Here's an example of an added extension for an index browse screen:

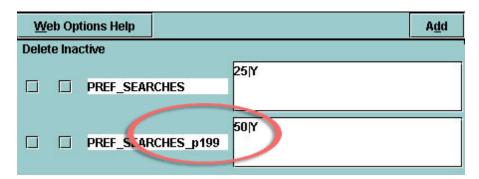
<u>W</u> eb Options H	elp	A <u>d</u> d
Delete Inactive		X
□ ■ BROW	VSE_t 245/2	nb/0 240/a/0 970/t/0 /abl/0
□ □ □ BROV	/SE /abef.	/cg-j

For BROWSE_t where the search results in a 245 entry, subfields |a and |b will be hotlinked:

Save Marked Records Save All On Page				
Num	Save	Titles (1-29 of 29)	Er Year75	tries Found
1		Reading Harry Potter: Critical Essays /	2003	1
2		Harry Potter and the chamber of secrets		9
3		Harry Potter and the chamber of secrets. Spanish.	1999	1
4		Harry Potter and the deathly hallows	2007	1

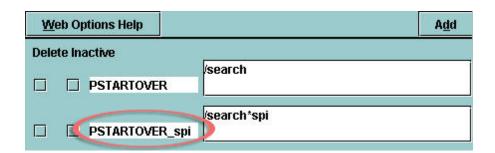
But for all other Index Browse screens (Author, Subject, etc), subfields |a>|b>|e> and |f> will all be hotlinked.

Extensions may also be for patron types:



This means that patron type 199 can have 50 saved Preferred Searches, while all other patron types may only have 25.

As well as for languages:



This means that the Startover button will return patrons who are in the Spanish catalog, to the Spanish Search page. While the PSTARTOVER, without the extension, will take patrons back to the English Search page. The "/search" is the command link for the opacmenu page.

There is an extension for scopes as well. Scoped Web Options are a little different. The number of the scope is added to the token without an underscore "_" or a letter, as is done with language or patron type related Web Options. The below image indicates that scope 11 may have a different bottom logo (botlogo_s11.html) than all other scopes. See <u>customizing files</u> for Scopes.

<u>W</u> eb Options Help	Add
Delete Inactive	
□ □ BOTLOGO	@screens/botlogo.html
	@screens/botlogo_s11.html
☐ BOTLOGO11	

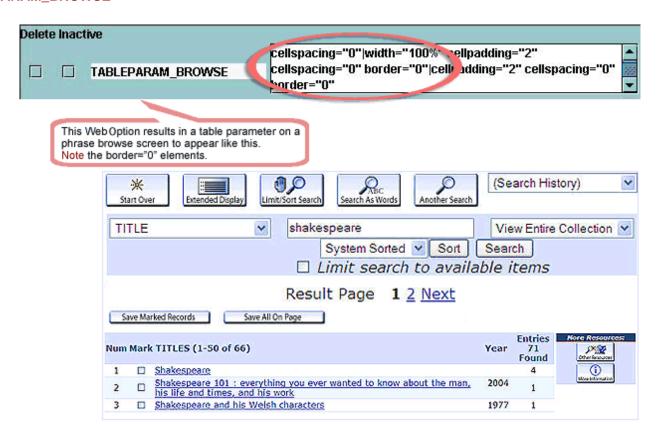
For additional information, refer to the Innovative Guide & Reference, Page # 106858: Web Options.

Web Option Examples

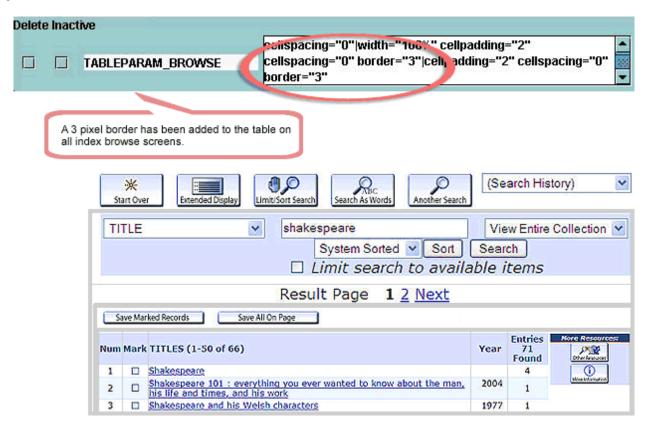
Web Options control system-generated page displays including table parameters, the display of buttons and icons, and are used for enabling features. Furthermore, they assist in bring consistency to your library's WebPAC through the toplogo.html and botlogo.html pages. In general, if it's a system generated page or function, it's likely controlled, or can be altered, by a Web Option.

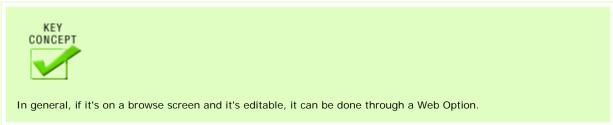
Listed here are but a few that demonstrate how they affect the WebPAC.

TABLEPARAM_BROWSE



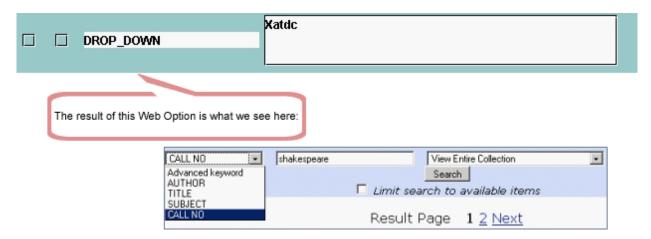
With one small change to a TABLEPARAM Web Option by changing the border from 0 to 3, you can see what that Web Option does.





DROP_DOWN

An example of this can be seen with the drop down list of indexes on all browse, or system-generated, screens.

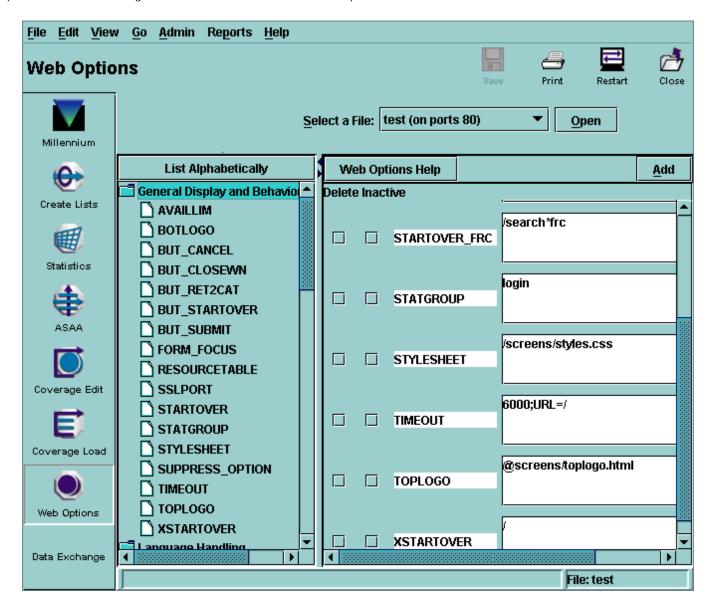


Add the insert tag "i" for **Standard No** as seen here:



Viewing and Changing Web Options

Web Options are available through Millennium Administration in the Web Options Mode.

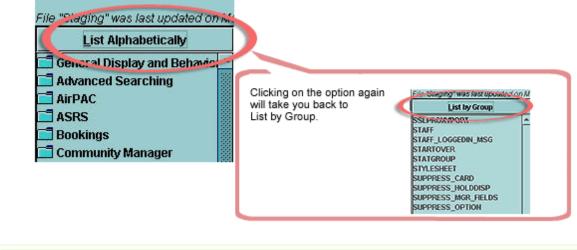


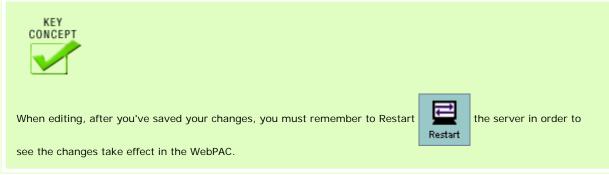
Depending on the number of web server directories (Live, Staging, Kids, etc.) your library has, you could have several Web Options files. Before editing, you first must make these files available through **Admin | Settings | Web Options**.



There is no need to key in new Web Options that become available with upgrades, they will be automatically found in your Web Options mode. You will only need to enable or edit them.

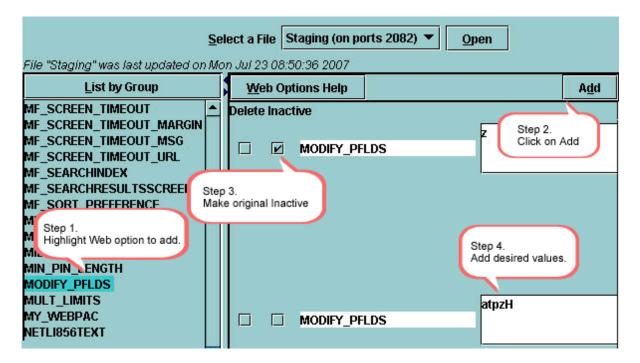
You'll see an option at the top of this list that allows you to go from List by Group to List Alphabetically.





NOTE:

1. Don't change the existing Web Option, just click on Add. See Steps below. This way, if you are not happy with the results, you can easily change it back without having to remember what was changed.



2. When upgrading to a new release, new Web Options will automatically be added to your Web Options file. You will only need to add the new Web Option as mentioned above.

For additional information, refer to the Innovative Guide & Reference, Page #106900: Alphabetical List of Web Options.

For additional information, refer to the Innovative Guide & Reference, Page #106858: Web Options Listed By Group.

For additional information, refer to the Innovative Guide & Reference, Page #106807: Updating Web Options.

Library Customizable Forms and Pages

WebPAC Pro includes default Customizable Forms that are HTML pages. These are static pages and will display the same information every time a library user requests them. Examples of static pages in WebPAC are the Main Menu and OPAC Menu pages. Other static pages are Search Help Pages, which provide the library user with search hints and search instructions, briefcit, bib_display, and webpub.def. Additional Customizable Forms include other pages such as acquire_web, suggest_web, and patron record display.

These customizable HTML static pages relate to other pages and include pro-style sheets, command links, and tokens.

- Style sheets are for the look and feel of your WebPAC; these style sheets are referred to in the HTML pages as styles.css and/or ie_styles.css.
- Command links are <u>reserved words</u> that tell the system to perform certain functions. They are always preceded by a slash "/" and they look similar to the following example:

http://yourlibraryIP/search/a

• HTML tokens are placeholders that define files such as:

```
<!--{toplogo}-->
<!--{botlogo}-->
<!--{nameprompt}-->
<!--{logout}-->
```

and other links to pages such as search help pages.

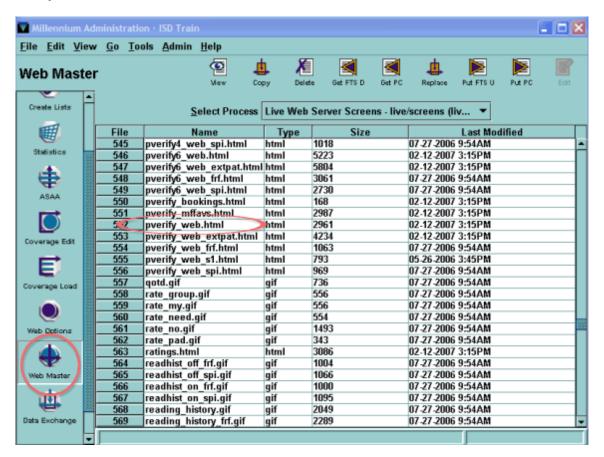
Your library can take advantage of the flexibility of these pages and change them as much or as little as it will fit the needs of your unique organization.

Customizable Forms are system generated hard-coded HTML documents that control the display and content of static pages in the WebPAC, outputting different HTML pages dynamically when command links or command functions are issued by the user.

It is important to note, that custom forms are specially named. You can create new Custom Forms; however, when you place these new pages into the HTML Screens directory you must name the new pages using the special name.

Customizable Forms are edited in Web Master mode. The screen bellow illustrates an example of one of the Patron Record Display Forms, the View Your Own Patron Record Verification Form:





An excerpt part of the customized form with the tokens will look like:



You can edit or replace default Customizable Forms. Just remember to rename the form that you are replacing and name the new form using the special name, e.g. mainmenu.html, bib_display.html.

Other Customizable Forms can be seen throughout this tutorial, such as mainmenu.html, opacmenu.html, srchhelp_x.html, bib_display.html, acquire_web.html, and more.

For a complete list of Customizable Forms and files, refer to the Innovative Guide & Reference , Page # 106941: Customizable Web OPAC Forms.

For current examples of customizable web forms, Web Options, and style sheets see the appropriate example set in <u>WebPAC Example Sets and Photoshop Files on CSDirect</u>.

For more information on customizing your WebPAC refer to the ${\it Innovative Guide \& Reference}:$

Page # 107009: Preparing the Content for Customizable Files and Editing

Page # 107052: Editing Customizable Files and Options Using Innovative Programs

Page # 107010: Editing Customizable Files Using non-Innovative Programs.

Customizable Forms can be customized for language, scope, and PTYPE

Customizable Forms can be customized for language, scope, and PTYPE. You can create separate custom forms for each combination of language, scope, and patron type by using the following naming convention:

<form name>_LANG_s#_p#.html

LANG	The language code (spi for Spanish, frc for French, etc.).		
s#	The number of the scope (s1, s2, s3, etc.).		
p#	The patron type or PTYPE (p0 or p243, etc.).		

This convention applies to all Customizable Forms unless otherwise noted.

Tokens

When looking at the coding of any html page or form in the Web Server directory (or using a 3rd party software editor), you'll note many elements in this format:

<!--{scope}-->

```
<select name="searchscope" >
    <option value="1" selected="selected"> View Entire Collection</option>
2
    <option value="2"> Emeryville Main Library</option>
 3
 4
    <option value="3"> Woodfin Branch-Emeryville Public</option>
5
    <option value="4"> Innovative University Combined Catalog</option>
 6
    <option value="5"> Main Library-Innovative University</option>
7
    <option value="6"> Medical Library-Innovative University</option>
8
    <option value="7"> Millennium School District Catalog</option>
9
    <option value="8"> Millennium Middle School</option>
10
    <option value="9"> Millennium High School</option>
11
    <option value="10"> Silver Art Museum</option>
12
    <option value="11"> Training Library</option>
    <option value="12"> Spanish Materials</option>
13
14
    <option value="13"> Videos/DVDs</option>
15
    <option value="14"> Serials</option>
16
    <option value="15"> Emeryville Public Libraries</option> </select>
```

This element is referred to as a "token." Tokens are placeholders for information. When a token is placed in a page, the Web server knows to look somewhere else for the data or information and pulls it into the page when it is displayed by a client browser.



Tokens cannot be seen by viewing code source in a client browser. What you see there is the result of the token.

Tokens themselves are not editable by the library. However, there are some tokens that act as placeholders for information that is under the library's control.

For those tokens, that contain information that the library does not have access to, the library may replace the token in the html page with the actually coding that the token produces. We'll see some examples of both concepts further on in this tutorial.



Just because a token works in one page, does not mean it will work in another. For this reason, Innovative does not provide a *list* of all possible tokens. So, when thinking of adding a token, take a look at the *Innovative Guide & Reference* page for the web page or form that you would like to edit. The tokens listed therein are for this specific page.

Formatting Tokens

The token is formatted inside curly brackets and then commented out, as such

<!--{token}-->

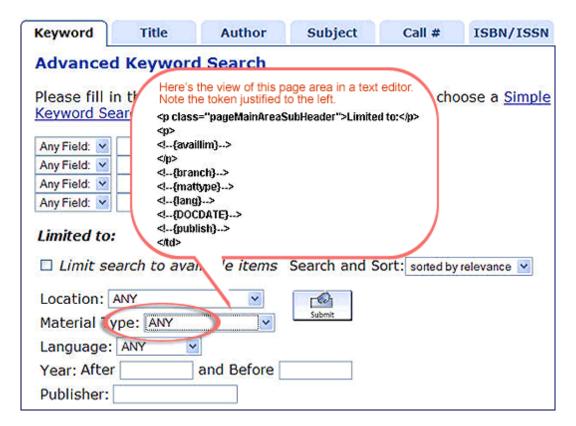
```
td width="25%" align="center" class="briefcitDetail">
49
    <!--{year}-->
50
    <br />
    <!--{media}-->
51
52
    <br />
53
   54
   55
   56
57
    <!--{items}-->
58
    </div>
59
```



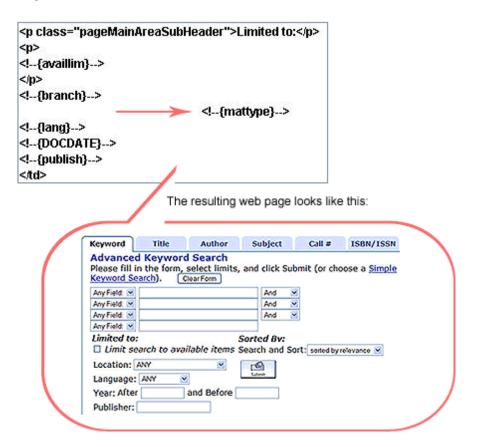
When using tokens, they must be justified to the far left of the page and be on a line all by themselves. For this reason, it is important to turn off automatic indenting in your web editing software (if you are using a web editor rather than a text editor).

Moving a token over even one space will disable it. If you want to temporarily disable a token, to see how it works, without deleting it from your file, you can simply move it over one space. However, if you move it far into the middle of the page will make it easier to see in order to move it back. It's easy to miss seeing a single space.

For example, look at the Advanced Search page (srchhelp_X.html). Note the limit by Material Type drop down option there. It is controlled by the {mattype} token.



Now, moving that token far to the right.



See that the limit by Material Type drop down menu is gone.

The {mattype} token is a placeholder for the information contained in the library's table of material type codes. Want to change a label or add a new code? You only have to make that change in Millennium under Admin | Parameters | General | Fixed-length codes | Mat Type. This is a good example of how a token acts as a placeholder for information kept elsewhere that the library has control over.

The option is available to have only certain material types displaying for limiting. For instance, if you didn't want to have Maps as a limiting option, it

could be removed. Innovative could create a separate file that would control which material types (codes and labels) to display. This would mean that you no longer control over the labels or codes displaying in the WebPAC. The {mattype} token would still be a placeholder for information kept elsewhere, that information would just not be under the libraries control. See <u>Service Commitments</u> under **Limiting**.

For additional information, refer to the Innovative Guide & Reference, page # (106051): Maintaining the Fixed-length Codes File.

Token Examples

As seen previously, there are tokens that are placeholders for information that is kept elsewhere on the system. The first example is the {mattype} token. This token will behave in one of two ways depending on how your system is setup.

- 1. The token is a placeholder for all the values listed in the library's Material Type table. This table can be accessed through any Millennium module from the drop down menu Admin | Parameters | General | Fixed-length fields | Mattype.
- 2. An alternate scenario with this token is that it could be controlled by a file on the system referred to as matmenu. This file exists in the data directory on the server. This file is not accessible by the library except in the case where a library staff member has taken the Advanced System Access and Administration Workshop, the library may edit many of these files.

Both of these scenarios can be seen with other tokens, such as the {branches}, in the Advanced Search Help and Limiting screens.

NOTE: How do you tell if your library is using these special files? If the values seen in the WebPAC in the dropdown lists for these limits does not contain all the valid codes from the Material Type or the Locations table, then the library is using the files. See <u>WebPAC</u> Service Commitments on CSDirect.

The second example is the {toplogo} and {botlogo} tokens. Added to static Web pages, they are placeholders for information that is kept elsewhere on the system. They work in the same way as the {mattype} token. However, with these two tokens, the information is kept in the Web server directory itself in the form of html pages, toplogo.html and botlogo.html.

These tokens work in conjunction with the TOPLOGO and BOTLOGO Web Options to allow the library to provide consistency, in look and feel, throughout the WebPAC. These Web Options cause the above html pages to display on all system-generated screens.

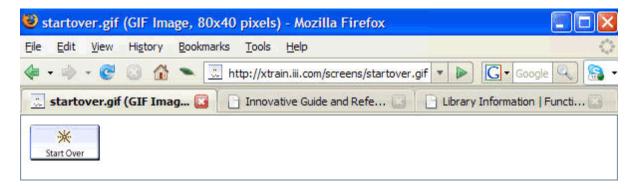
Here's the {toplogo} token in the mainmenu.html page.

When we look in the Web server, we see the toplogo.html file listed there.

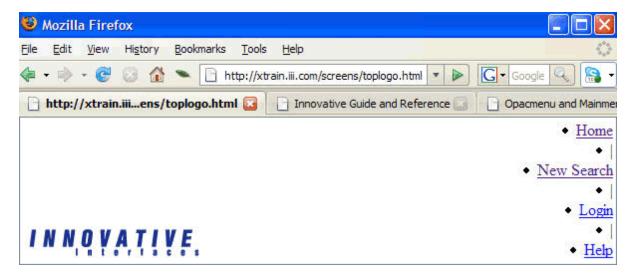
413	subjecthelp.jpg	jpg	35383	01-30-2007 3:52AM
414	submit.gif	gif	2032	01-30-2007 3:52AM
415	suggest_web.html	html	4425	06-21-2007 9:26AM
416	template.html	html	591	06-21-2007 9:26AM
417	titlehelp.jpg	jpg	30529	01-30-2007 3:52AM
418	toplogo.html	html	714	06-28-2007 1:03PM
419	toplege loggedin.html	html	749	06-21-2007 9:26AM

Note there is also a toplogo_loggedin.html page.

NOTE: Any file (html, gif or jpg) listed in the web directory can be viewed in a browser by using the "direct link" approach. Here are two examples:

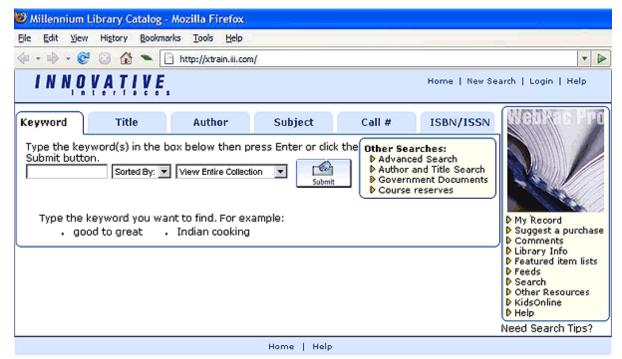


http://LibraryIP/screens/toplogo.html



We can tell that this is the toplogo.html page because the logo is there on the left and the top links are there on the right. Here it displays on its own without the style sheet or other functioning elements of the WebPAC.

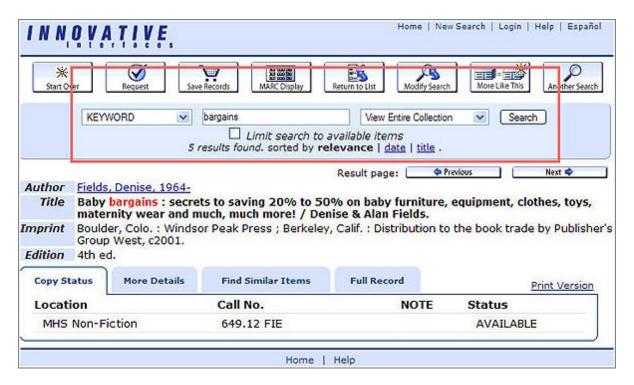
However, viewing the mainmenu.html page through a browser with all elements working together, we see this:



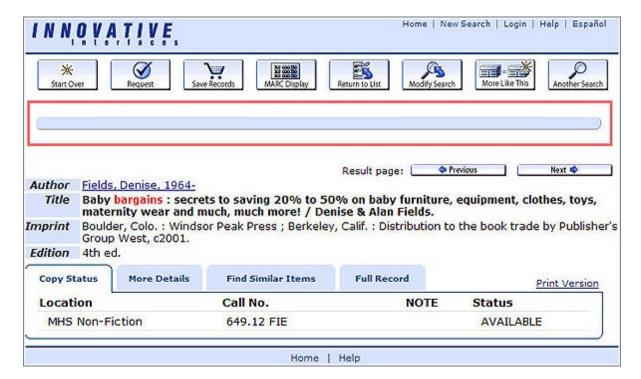
WebPAC PRO @ Innovative Interfaces, Inc.

A third type of token is that which may only be enabled or disabled. An example of this is the {searchtool} token on a few forms, for example,

bib_display.html, patron verification forms, and request_result.html. This token adds a list of drop down indexes and a search input box into the page. For libraries that have scopes, it also adds the scope drop down menu.



Disabling that token by moving it over results in:





If the values of the token are customizable elsewhere in the system (for example, the fixed field table for Material Types), you should change them there. Otherwise your only course of action is to view the source and hardcode that HTML into your page instead of using the token, adjusting it as desired. This means that whenever you upgrade software, you will need to confirm that the token's behavior hasn't changed. And if you update the table, you will need to go back to update the hard coded HTML as well.

Many features require tokens to be added. For instance, if the library wants to allow requests (also referred to as holds) to be placed from the bibliographic record display, a {holds} token must be present in the bib_display.html page.

For additional information, refer to the Innovative Guide and Reference, page # (106941): Customizable WebPAC Forms.

For additional information, refer to the Innovative Guide and Reference, page # (107017): TOPLOGO for Logged-in Patrons Custom Form.

For additional information, refer to the Innovative Guide and Reference, page # (105804): (ASAA) Advanced System Access and Administration.

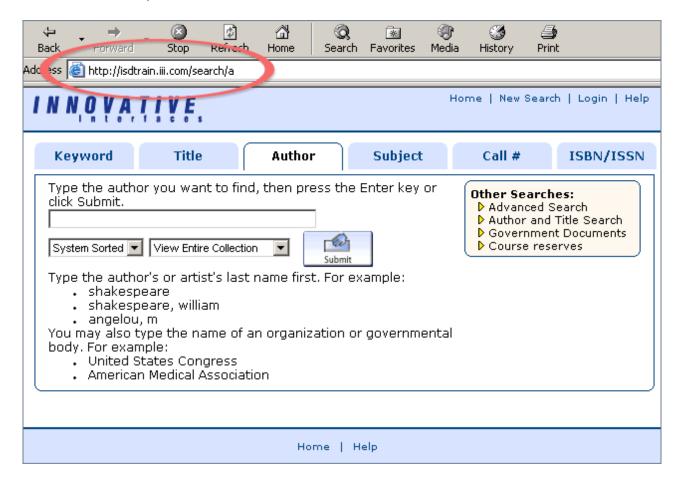
Command Links

Command links tell the WebPAC to perform a certain function, such as searching on a specific index or changing the scope of a search. The most commonly used Command Link is the search link. Other command links will invoke Custom Forms such as My Record, Help, or Suggest a Purchase.

For example, the Command Link */search/a* tells the WebPAC to search for a specific index, in this case the author index. The Command Link */patroninfo* will bring up the html page where patrons will fill out a form to login to their library record.

If no Command Link is added after the '*/*' the WebPAC will bring you the Main Menu page. There are command links for all the searchable indexes in your library; for example: */x* is used for keyword searching, */a* is used for author searching, and */t* for title.

The screen bellow illustrates an example of the Command Link for author /a:



Below are some examples of how the HTML looks for some command links that search the author, title, and subject indexes and that are supported in the mainmenu.html and opacmenu.html pages:

Author

Title

Subject

Below are examples of other command links used in WebPAC Pro, labels can be customized:

Suggest a purchase The /acquire Command Link will retrieve a form that a patron fills with his/her recommendation for purchasing library materials.

Comments The /suggest Command Link will retrieve a form that patrons can use to enter comments or suggestions for your library.

Feeds The /feeds Command Link will link to a feeds file that you can create for your library. Please note, that this /feeds Command Link does not access files in the http/live/feeds directory.

A complete list of command links is available in a table form in the Innovative Reference & Guide, Page # 106855: command link.

Standard Pages

Standard pages are custom pages that must exist because the system expects to find them, and will look for them in certain circumstances.

For example, when a command is entered in the system to start WebPAC Pro, to search an index, or to retrieve results and bibliographic records, the system looks for a page with a specific name. Because of this, it is essential to understand the importance of the <u>naming conventions</u>.

The WebPAC Pro standard pages include the following pages:

- Main Menu and OPAC Menu pages
- Search Help Pages
- Briefcit
- Bib_display
- Webpub.def

Opacmenu and Mainmenu

Main Menu Page

Your WebPAC comes with default HTML pages that are fully customizable. As discussed previously, the WebPAC is customizable using a combination of command links, style sheets, forms, and tokens.

It is important to know that WebPAC Pro requires the existence of the mainmenu.html page, this page can be redesigned, and many libraries use it as the entry web page for their library. You can use the Main Menu page to display your library's information, such as hours, services, programs, calendar of events, and link to other pages relevant to your organization. The only requirement of the Main Menu page is that it should contain a link to the organization's OPAC Menu page, opacmenu.html.

When a user selects the link to your WebPAC the resulting URL is http://yourlibraryIP/

This mainmenu.html screenshot displays some of the elements of the page.



The Main Menu page comes with default HTML links that you can edit to reflect services provided by your library. You can remove or comment out links to products that your library may not have acquired such as **Course reserves** and/or remove the link to **Other Resources**. You can also change the text of My Record to a different text such as My Patron Record, My Library Account, View your Patron Record, etc. Furthermore, on this page you can add links to other resources such as Interlibrary Loan, Other Library Catalogs, etc.

It is important to note that this page also supports other languages if your organization acquired this product. For example, to set up your WebPAC in Spanish you must create another Main Menu page; the naming convention will include the three-character code for the language, for example, mainmenu_spi.html.



WebPAC Pro requires the existence of the mainmenu.html page. You can redesign this page or make it an exact copy of opacmenu.html but you should not remove it.

For additional information, refer to the Innovative Guide & Reference, Page # 106942: The Main Menu Page.

OPAC Menu Page

The OPAC Menu is the page that offers search options to access the catalog, and it is designed to be the main search screen. The direct URL for the OPAC Menu page is http://yourlibraryIP/search or, as shown in the example below, http://www.xtrain.com/search. In the default setup of the WebPAC, this page is identical to the default Main Menu page. Both pages can be customized together and kept the same, or can be customized separately to have very different content and presentation.

If they are made to look different, a user would get an entry page each time they enter your catalog via mainmenu.html, and would get a page with different options each time they started a new search via opacmenu.html. If these pages are kept the same, then the entry page and search page will be seamlessly integrated and users will not be able to notice that they are being directed to different pages. The opacmenu.html supports both languages and scopes: opacmenu_lang.html; opacmenu_s#.html (# is the number as given in the Scope Menu).

The OPAC Menu has been designed to be the main search screen. Therefore, by default the New Search link and the this page. However this behavior is customizable via the WWWOPTIONS.



The OPAC Menu is fully customizable to reflect the needs of your organization. Index search options are available from this screen and can be changed to reflect your library's choice of indexes to search. For example, if your library offers a search by journal title, a tab can be added to allow searching the journal title index. If your library does not offer one or more of the default index searches, you can deactivate them by commenting them out. You can also change the default sorting offerings to reflect your organization's preferences.



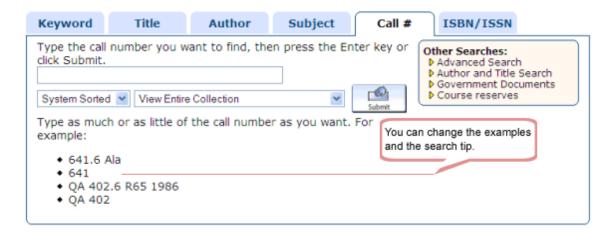
Other Searches can be customized removing unwanted features and adding other search options that you may want to offer to your library users.

For example, libraries without government documents collections will not have a need for a search link to the index that searches government documents call numbers, or those libraries that are not using Course Reserves will want the Course Reserves link removed.

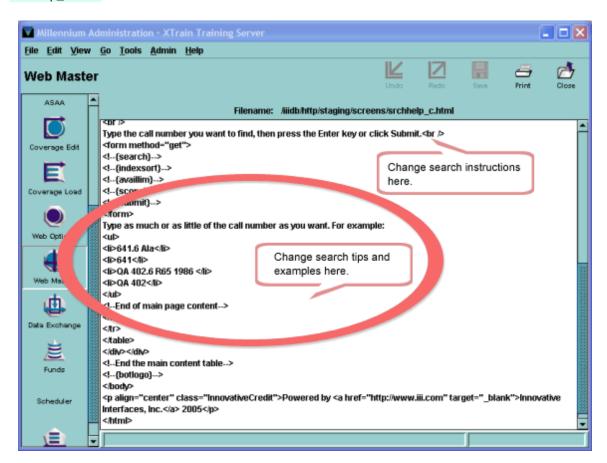
For additional information, refer to the Innovative Guide & Reference, Page # 106949: The OPAC Menu Page.

Search Help Pages

Search Help pages provide a form into which the user enters the text to be searched in the catalog. These Search Help pages offer searching hints and examples for each specific index. WebPac Pro comes with standard Search Help files for each searchable index in your system; you can customize these pages and provide examples that are relevant to your library and your patrons, utilizing examples that reflect your collection.



Search Help pages are customizable through Web Master mode and are located in the screens directory. All the Search Help pages are named srchhelp_x.html, where "x" is the index tag to search. The title Search Help page is named srchhelp_t.html, author is named srchhelp_a.html, subject is named srchhelp_d.html, and so on.



The Advanced Search Help page, srchhelp_X.html, offers the capability to limit searches using one or more criteria. You can customize this page to present only those limit options that your library is interested in offering.

For additional information, refer to the *Innovative Guide & Reference*, Page # 106950: <u>Search Help Pages</u> and Page # 106847: <u>Advanced Search Help Pages</u>.

Brief Citation Form

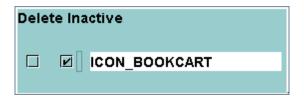
The Brief Citation Form is a Search Results Page that it is a customizable form, and it is considered a required page, not optional. This page uses tokens and works with the TABLEPARAM_BRIEFCIT Web Option.

The Brief Citation Form, brieftcit.html controls the information brought by the WebPAC from the bibliographic record into the list of search results. Brief Citation is used for all record browse displays; these include phrase index search results, keyword search results, and record browse results. This page is also customizable and some of the elements that can be modified include the bibliographic information and the item information such as location, call number, and status that your patrons will see when they get the Search Results Page with the browse list of titles.

The tokens in this page determine, among other things, the display of bibliographic information <!--{fieldspec:[fieldspec:]} -->, or <!--{linkfieldspec:[fieldspec]} -->, item information <!--{items}-->, bookcart <!--{mark}-->, ratings <!--{rating}-->, and more as illustrated below.

```
Token that displays the bookcart image or the
                         text when the ICON_BOOKCART
                         Web Option is defined.
<!--{entrynum}-->
</div>
<!--{mark}-->
                                                                If your library uses Patron Materials Rating this
token is replaced with the materials rating tool.
To turn off ratings change the PATRATE Web
<!--{bookjacket}-->
                                                                Option to false.
(br/)
<!--{rating}-->
<br/>
<br/>
>
                                                               Token that controls the display of the bibliographic
<div class="briefcitRequest">
                                                               information displayed.
<!--{request}-->
                                                               V=Variable Field
</div>
                                                               b=Record type - bibliographic
t=Title tag
ktd width="57%" align="left" class="briefcitDeta 245=MARC tag
                                                               ab=Subfields a and b
<!--{nohitmsq}-->
<span class="briefcitTitle">
<!--{linkfieldsped:\Vbt245ab}-</p>
</span>
```

The <!--{mark}--> token in this page will display the image of the patrons can click on the image or the text. This will work if the ICON_BOOKCART web Option is defined, each brief citation will be wrapped in con_Bookcart and as a result the image and text will display. It is easy to remove the bookcart image from this page, in Web Options find the ICON_BOOKCART and mark it Inactive.



The page without the book cart will offer patrons a check box that can be used to mark bibliographic records for saving.



<!--{fieldspec: [fieldspec]} --> or <!--{linkfieldspec: [fieldspec]} --> These two tokens replace the value of the [fieldspec] with the bibliographic record data located in the specified fields, the data can be located in the fixed length or variable fields. The difference between them is that <!--{linkfieldspec: [fieldspec]} --> displays the fields as a HTML hyperlink to the full record display of this citation.

To control which variable length fields are displayed the system uses variable length field spec tags.

For example, T will select the "best" t-tagged field based on the following criteria: if the DISPLAY_245 Web Option is set, the 245 field is used instead of the tagged field. If there is no 245 field the first t-tagged field is used instead. The token will look like: <!--{linkfieldspec:VbT}-->

In another example, to change the information displayed from a title you can change the token <!--{linkfieldspec:Vbt245ab}--> to <!--{linkfieldspec:Vbt245:abch}-->

The token <!--{items}--> will display item information, call number, location, up to three items. When you use <!--{items}--> token in the briefcit.html, it pulls in the item summary table just as it is setup to display in the bib record.

```
</tab
</tr>

</tab
</tr>
</tab
</tr>
</tab
</tr>
</tab
</tr>
</tab
</tr>
</tab
</tr>
</tab
</tab
</tab
</tr>
</tab
</table>
```

In briefcit.html, it is possible to output URL information from single or multiple y-tagged 856 and 962 fields, along with associated notes.

Results Sorting in the Browse Display

The system sorts the results alphabetically by title. When two or more records have the same title, the system sorts on the first "t" tagged field in the record, whether the first tag is a 240, 245, 222, etc. If there are multiple records with the same title, they are sorted sequentially by record number. Your library can use the DISPLAY_245 Web Options to force the system to display the 245 in record browses (not phrase browses). In this case you will want to use Iinkfieldspec:Vbt245ab.

For additional information, refer to the *Innovative Guide & Reference*, Page # (107132): Sorting Results in the Browse Display and *Innovative Guide & Reference*, Page # (106872): Search Results Options

Other Brief Citation Forms

The system provides three additional customizable brief citation forms:

briefcit_auth.html	e Brief Citation Authority Record Form, briefcit_auth.html controls the display an authority record in a brief citation. The Authority Redirection Form, thority_redirect.html, it is used to control the display of single authority directions, both for See references from unauthorized term to an authorized term, and for See Also references from an authorized term to a related thorized term.	
briefcit_resource.html	The Brief Citation Resource Record Form, briefcit_resource.html controls the display of a resource record.	
briefcit_small.html	The Brief Citation Small Form, briefcit_small.html is good for sites that want to use a smaller, more stripped down briefcit.	

For additional information, refer to the Innovative Guide & Reference, Page # (107034): Brief Citation Form.

For additional information, refer to the Innovative Guide & Reference, Page # (107036): Brief Citation Authority Record Form.

For additional information, refer to the Innovative Guide & Reference, Page # (107037): Brief Citation Resource Record Form.

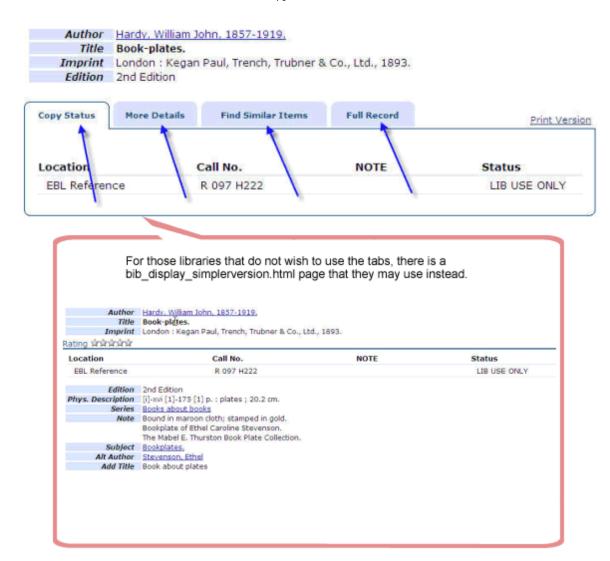
For additional information, refer to the Innovative Guide and Reference, page # (107040): Authority Redirection Form.

BIB_DISPLAY

The bibliographic record display is fully customizable in WebPac Pro and is done so through two separate files, one of which is the bib_display.html, the Bibliographic Record Display Form . See also the webpub.def discussions, as this is the other file that controls field displays.

The bib_display page behaves like other standard WebPac Pro forms in the sense that *if* the bib_display.html does not exist in your screens directory, there is a system default file that will be invoked.

This file is what controls the existence of tabs that we see here for Copy Status, More Details, Find Similar Items, and Full Record.



This page is almost entirely made up of tokens. The <--{recordinfo: [variable fields tags]}--> defines the variable length fields from the *Bibliographic Records* (based on Field Group Tag) that will display in this page. The fields will display as indicated by the tag IF the field exists in the bibliographic record.

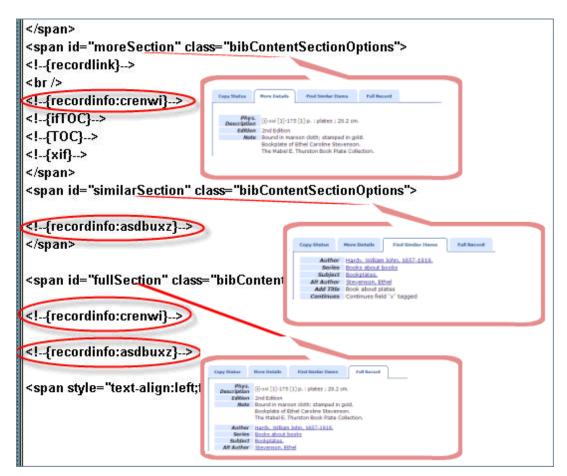
This very essential token could display five times in the bib_display.html page, with varying elements or field group tags.

One, near the top of the file, which controls the fields that display above the attached records (the attached record fields for items and checkins are controlled by the webpub.def):

```
<div style="margin:0 0 0 2px;">
<div id="infoTable">
<div class="bibPager">
<!-{pager}-->
</div>
{!--{recordinfo:!}--
<!-{linkeddocs}->
<!-{URLS}-->
                                   Author Hardy, William John, 1857-1919,
                                    Title Book-plates.
<!--{holdingslink}-->
                                  Imprint London: Kegan Paul, Trench, Trubner & Co., Ltd., 1893.
                                   Edition 2nd Edition
<!--{bloblinks}-->
<!--{imagelinks}-->
                              Copy Status
                                                   Find Similar Items
                                         More Details
                                                                    Full Record
<!--{artthumb}-->
<br/>br/>
                             The default for! is atpeR
<!--{xmlframe}-->
<div>
```

And the other four are in the middle.

Note under which section of the record display these tokens are placed:



NOTE: If your bibliographic display shows duplicated fields in any one of these areas (say the Full Record), take a look at the <-- {recordinfo: [variable fields tags]}--> tokens. Check to see if there are duplicate field group tags in two or more of the tokens, or if there are duplicate tokens with exact same field group tags.

Internet Explorer can sometimes distort the display of bibliographic and attached records. By using the Web Option INSERTTAG_INHEAD, to declare with a <!--[if Ite IE 8]> the distortion issue will be resolved.

Delet	e Ina	ctive		
			src="/screens/bibdisplay.js"> [if Ite IE 8] <link< th=""><th>_</th></link<>	_
		INSERTTAG_INHEAD	rel="stylesheet" media="all" type="text/css"	988
			href="/screens/ie_styles.css" /> [endif]	◛

Resource, course, and program record display are also customizable forms.

For additional information, refer to the Innovative Guide & Reference, Page #106854: Bibliographic Record Display Form.

For additional information, refer to the Innovative Guide & Reference, Page #107231: Customizing the Bibliographic Record Display.

For additional information, refer to the *Innovative Guide & Reference*, Page #107094: Course Record Display Form.

For additional information, refer to the Innovative Guide & Reference, Page #107242: Customizing the Course Record Display.

For additional information, refer to the Innovative Guide & Reference, Page #107106: Resource Record Display Form.

For additional information, refer to the Innovative Guide & Reference, Page #107243: Customizing the Resource Record Display.

For additional information, refer to the Innovative Guide & Reference, Page #107107: Program Record Display Form.

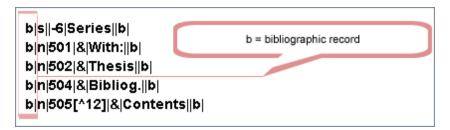
webpub.def

Record Display Definition, **webpub.def** file allows your library to define which fields will display in your WebPAC bibliographic record and attached records display, in what order, and with which labels. It also controls the size of the columns, which MARC tags, indicators, and subfields will display.

The webpub.def file is fully customizable. You can customize the bibliographic record display definition to suppress a line from public view or you can define a field that you do want to display to the public. You can also rename the labels for the fields.

When your library's WebPAC Pro is installed, a webpub.def file will be created in your system. You can modify this file by using any text editor, or you can edit it in Millennium Administration Web Master Mode.

Below is a snapshot of the webpub.def file, where you can see some of the elements used in a line. The first element defines the record type, b for bibliographic record, i for item record, c for holdings record, e for resource record, g for program record, and I for license record.



Fields display order

The second element in the line is the field tag. You can use any valid field tags (t, a, p, e, n, d, u, etc.). Fields with the same tag will display together and cannot be displayed separately. For example all the t tagged fields will display one after another, and all the a tagged fields and the n tagged fields will appear in their respective field tag groups.

The third element is the MARC tag and indicators. Specifying MARC tags and indicators is optional.

The fourth element (also optional) contains the subfields, which will always appear in the order they were stored within the record. It is not possible to control the order in which subfields appear in the webpub.def file.

The fifth element is the label. It is possible to define labels for the different MARC fields in the file.

```
b|a 110 & Corpauthor||b|
b|a 111 & Conference||b|
b|a | 111 & Conference||b|
b|a | & Author||b|

fconverted from HOLDINGS_POS field tag:'t'

fb|t 240 & UnitTitle||b|
b|t||& Title|||b|

fconverted from HOLDINGS_POS field tag:'D'

Label

b|p 270 & Address||b|
b|p||& | Imprint|||b|

#
#converted from HOLDINGS_POS field tag: 'e'

#
b|e||& | Edition|||b|
```

Suppressing a Line from display

To suppress a defined tagged field from displaying in the WebPAC you can place a pound sign "#" in front of the line you want to suppress, and you need to add a line under the tagged line leaving the MARC field definition and the label definition blank.

For example, if you have two i tagged fields and you want to suppress one of them, the other i tagged line needs to read: #b|i|020|&|ISBN||b|
b|i||&|||

Adding a Line to Display a New Field

To add a line to display a field that currently is not displaying in your library records is very simple. To add the barcode field to display to the public, follow these steps:

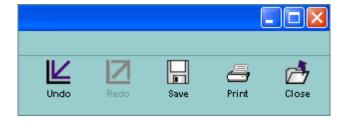
- 1. In Millennium Administration Web Master mode choose to Edit the webpub.def file.
- 2. Go to the part of the file that you wish to change.
- 3. To obtain a blank line, go to end of the line preceding the line you want to create and hit the enter key. A blank line will be created.

```
i|1||||25|b|
i|C||||0|b| 
i|v||||0|b| 
i|#||||25|b|
i|Q||||b|
|
i|z|||NOTE|0|b|
i|%||||15|b|
```

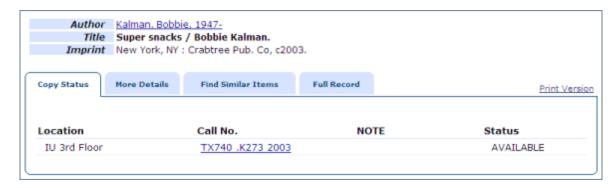
4. Type the line definition to create a line that will display the barcode: i|b|||Barcode|b|

```
i|1||||25|b|
i|C||||0|b| 
i|v||||0|b| 
i|#||||25|b|
i|Q||||b|
i|b|||Barcode|b|
i|z|||NOTE|0|b|
i|%||||15|b|
```

5. Save and close the webpub.def file.



Before adding the Barcode field to display in the item record, the display of the record looked as follows:



After adding the Barcode field to display, the record looks as follows:



Troubleshooting Tips

Possible Problem: You see a line with a field tag and a MARC tag in the webpub.def file but the field does not display in WebPAC Pro.

Possible Solution: Look for bad line construction with odd characters or missing characters. For example, a commented-out line will cause the system to ignore lines in the file.

Possible Problem: You make a change such as adding a label and you don't see the change displayed.

Possible Solution: This particular example happens when ^M characters are added at the time the file is uploaded from Windows to Unix as binary rather than as ASCII file. If you have these characters, check that the webpub.def is being uploaded as ASCII.

Possible Problem: Your webpub.def is full of control characters that are interfering with the system interpreting the file.

Possible Solution: This can happen if the file is opened or edited using a word processor or HTML editor. To fix this problem, remove the control characters. We recommend editing the file in a text editor such as notepad or vi or using the Web Master function in Millennium Administration to edit webpub.def in place on the server.

Languages and Webpub.def

You can create separate bibliographic and holdings record display files for each combination of language, scope, and patron type by using the following naming convention:

webpub_lang.def = webpub_spi_def or webpub_frc.def

For additional information, refer to the *Innovative Guide & Reference*, Page # (106853): Record Display Definition.

Patron Verification Forms

The Patron Verification Form is called by the system using the command link **/patroninfo**. The form works with a combination of tokens and Web Options. You can have different forms by language, and you can customize these forms to include login instructions specific to your organization's requirements.

Patron Verification Forms can be used by your organization to restrict access to your library patrons to a variety of services, such as requesting materials from the WebPAC and viewing their patron records. When patrons authenticate through a Patron Verification form, the system can limit requests by patron type or patron code, charge patron for requests, and more.

Patrons can view their own patron records in WebPAC Pro. As with other custom forms, this form is customizable in Web Master. When a patron selects "Login" or "My Record", WebPAC calls the pverify_web.html page:



The pverify_web.html form may be edited for customization in Web Master mode:

pverify_mffavs_spi.html	html	2783
pverify_web-pb1.html	html	2484
pverify_web.html	html	2769
pverify_web_adv.html	html	3128
pverify_web_extpat.html	html	4093
pverify_web_extpat_spi.html	html	5155

A portion of the customized form with the tokens will look like:

```
<br/>
<br/>
<!-{patform}-->
<!-{startover}-->
Token asking for your name and barcode information.
```

For additional information, refer to the Innovative Guide & Reference, Page # 107004: Patron Verification in the WebPAC.

For additional information, refer to the Innovative Guide & Reference, Page # 107019: View Your Own Patron Record Verification Form.

Other patron verification forms are used in WebPAC Pro to verify patrons when they use certain features:

Pverify2_web.html is used for Web Access Management Verification.

For additional information, refer to the Innovative Guide & Reference, Page # 107043: Web Access Management Verification Form.

Pverify3 _web.html is used to verify that a patron can request materials in WebPAC Pro.

For additional information, refer to the Innovative Guide & Reference, Page # 107028: Request Verification Form.

Pverify4_web.html is used to place multiple requests from saved records in WebPAC Pro.

For additional information, refer to the *Innovative Guide & Reference*, Page # 107029: <u>Batch Requesting Form</u>.

Pverify6_web.html is used to authenticate patrons that use Course Reserves and Millennium Media.

For additional information, refer to the Innovative Guide & Reference, Page # 107033: Course Reserves/Millennium Media Patron Authorization Form.

Additional Pages

As seen in previous sections of this tutorial many forms in the web server directory require a command link in order to function properly. Additional forms spoken of here that require command links are acquire_web.html and suggest_web.html.

There are also a few pages that will need just "direct links." A direct link would look like http://libraryIP/screens/help_index.html.

NOTE: Remember all pages, forms and images are under the same /screens directory.

All direct pages are informational and are not required by the web server: help_index.html, libinfo.html, feeds_examples.html, resources_index.html, etc.

An example of an informational page that only requires a direct link is help_index.html. The tabs lead to other informational direct link pages.



And what we see below are a combination of command link forms and direct link pages. The "Suggest a Title for Purchase" form requires the /acquire command link.



The feeds_example.html file is a sample page to show how the library may use incoming feeds. Incoming feeds, of course, can be added to any static page, and if the library has purchased the product Feed Builder, they can create outgoing feeds to add anywhere they wish as well.

There are other products that include html pages or forms in the set up. See the *Innovative Guide & Reference* and Innovative Product links below for more information.

Links to these forms or pages may be placed anywhere the library wishes. Remember to check the *Innovative Guide & Reference* for possible tokens that may be used on the forms. You will not find, however, information on the direct link pages spoken of here. They are simple html pages and only the {toplogo} and {botlogo} tokens may be used on them.

NOTE: What's important to remember here is that although these pages can be scoped and internationalized, the {toplogo} and {botlogo} tokens do not work in these direct link pages for WebPACs of other languages. The full coding of the toplogo.html and botlogo.html must be inserted into the pages. Please see the <u>Alternate languages</u> section of this tutorial.

For additional information, refer to the Innovative Guide & Reference, Page #106941: Customizable WebPAC Forms.

For additional information, refer to the Innovative Guide & Reference, Page #107081: Using AirPac.

For additional information, refer to the Innovative Guide & Reference, Page #107007: <u>Using Kids Online</u>.

For additional information, refer to the Innovative Guide & Reference, Page #107086: <u>Using Ecommerce</u>.

For additional information, refer to the Innovative Guide & Reference, Page #106995: <u>Using Patron Self Registration</u>.

For additional information, refer to the Innovative Guide & Reference, Page #107138: Using Program Registration in the OPAC.

For additional information, refer to the Innovative Guide & Reference, Page #106843: Using Community Reviews.

For additional information, refer to the Innovative Guide & Reference, Page #106987: <u>Using Feed Builder</u>.

Features and Products

The Millennium WebPAC comes with many patron empowerment features and products. All Innovative WebPACs that are on the latest release can enable any of the existing features. Libraries that have purchased any of the additional WebPAC products may be required to enable certain Web Options and edit some pages in order for your patrons to use these functions.

Features

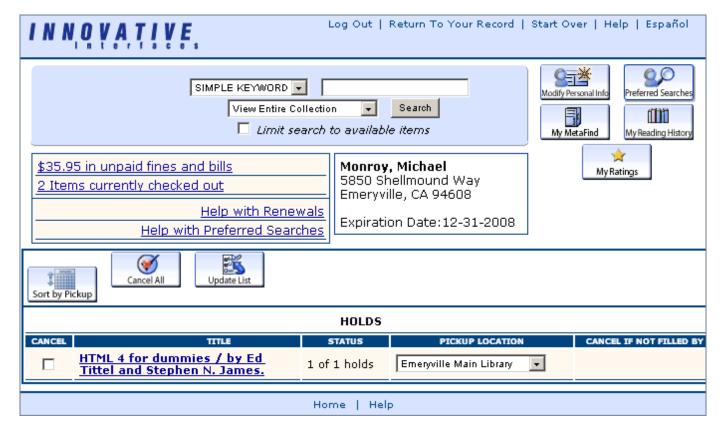
WebPAC Pro can be enhanced with many of the latest features. These are enabled or disabled in Web Options. These include:

- My Millennium
- Featured Lists
- Ratings

My Millennium

My Millennium is a feature that allows patrons to access their own patron record and perform many functions: view holds, cancel holds, view checked out items, renew items, view fines, and more. If libraries want to enable access to this feature:

- 1. Enable MY_WEBPAC wwwoption and
- 2. Provide a link for access http://yourlibraryIP/patroninfo
- 3. Possibly edit some HTML pages or forms



Note the use of command link /patroninfo for accessing My Millennium. There are several Web Options that need to be enabled, as well, should the library decide to allow their patrons to perform the above-mentioned functions.

For additional information, refer to the Innovative Guide & Reference, Page # 106850: Patron Record Options.

For additional information, refer to the Innovative Guide & Reference, Page # 106849: My Millennium Options.

Featured Lists

This feature allows libraries to provide direct access to review files from within the WebPAC. Library staff creates review files of materials with Create Lists, and enable web access through the FEATURED_LIST Web Option. The URL that links to an individual "featured list" may be used to send a subject list of newly acquired titles to an academic library's psychology professor or department, for example. Or post a public library's list of newly acquired Best Sellers right on their library's main page.

These are static files, and libraries will, of course, be required to keep these review files updated in Create Lists, if appropriate. Note the use of another command link, /ftlist.

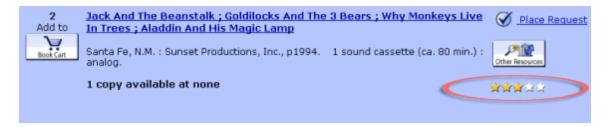


Ratings

Patron Materials Ratings is a feature that does not require special setup by Innovative. This feature allows patrons to view the items they have rated as well as those other patrons have rated when logged into their patron record.

Most benefits of the Patron Ratings in WebPAC feature My Millennium. Innovative recommends implementing My Millennium before offering patrons the option to rate materials in the WebPAC.

Your ratings when logged in:



Others' ratings when not logged in:



Material unrated and user logged in:



Libraries on Release 2005+ can enable patron ratings through Web Options.

For additional information, refer to the Innovative Guide & Reference, Page # 106916: Patron Materials Rating Options.

Products

WebPAC Pro supports a variety of products that take advantage of the latest in Web technologies. These include:

- Feeds
- Spell Check
- Community Reviews
- Patron Self-Registration
- ECommerce

Feeds

There are two products associated with feeds:

1. Feed Builder

Libraries with WebPAC Pro and the Feed Builder product can construct their own outgoing feeds containing information specified in saved boolean lists or review files. The content of these feeds is controlled by library-created configuration files. Using these files, Feed Builder creates XML files nightly with the feed information stored in the **/live/feeds** directory.

2. My Record Feeds

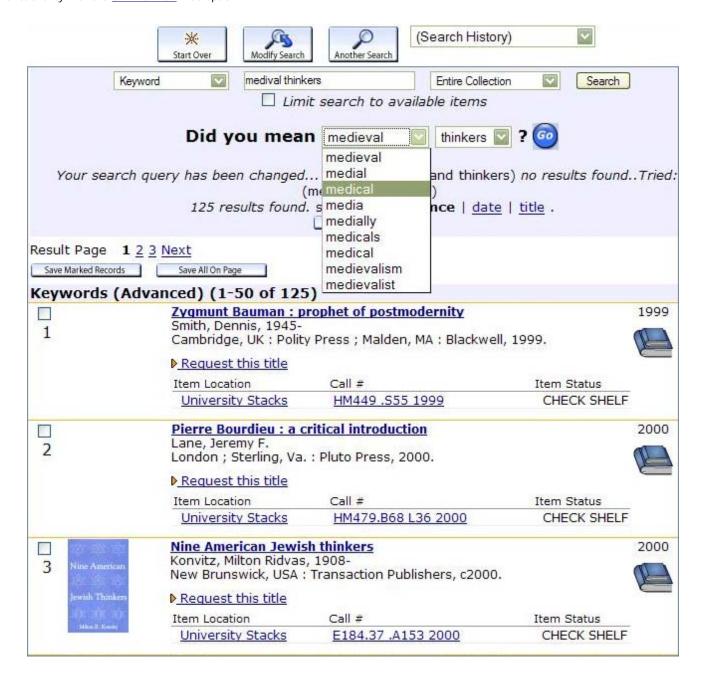
You can use the My Record Feeds product to offer patrons an RSS feed of patron-specific information, for example, indicating that materials are ready for pickup or are due soon. WebPAC Pro displays the information feed using a complex and unique identifier to ensure only the patron will view the relevant feed. There are a few Web Options that are associated with this product.

For additional information, refer to the Innovative Guide & Reference, Page # 106987: Using Feed Builder.

For additional information, refer to the Innovative Guide & Reference, Page # 106984: Using My Record Feeds.

Spell Check

In order for libraries to use this product, they must be running WebPAC Pro. The <u>Spell Check</u> product allows your library to offer suggestions for corrected or alternate search terms in Advanced Keyword Searching. When your library acquires the Spell Check product, you can enable the Spell Check functionality with the SPELLCHECK Web option.



Community Reviews

You can use the Community Reviews product in WebPAC Pro to offer patrons who have logged in to their account via My Millennium the ability to add text reviews of items in the catalog for the benefit of other readers. WebPAC Pro displays a portion of related reviews in the record display.

NOTE: Your library must be running WebPAC Pro in order to use the Community Reviews product.

Library staff can moderate reviews submitted by patrons in the Community Manager Web-based staff interface. You can access the Community Manager using:

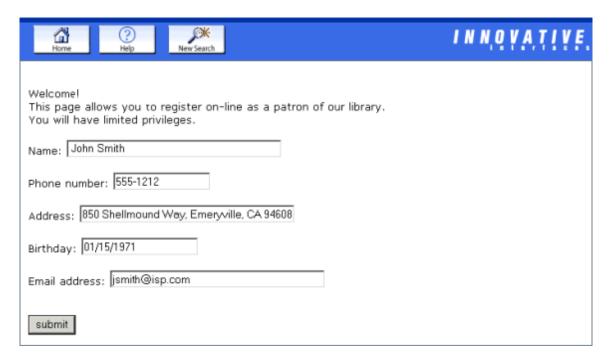
- The Moderate link that displays in the notification email the system generates when a patron submits a review or reports abuse.
- The Moderate link that displays in the bibliographic record when you are logged in as staff and viewing the public view.
- The Community Manager URL. By default, your Community Manager URL is:

http://[your library address]/iii/community/reviews

You must validate using initials and password to access the Community Manager. Once you have successfully validated, the system displays a list of unapproved Community Reviews.

Patron Self-Registration

Patron Self-Registration is an add-on product for Web OPAC and WebPAC Pro that allows patrons to self-register online for library privileges. An organization that has purchased Patron Self-Registration can add the <u>/selfreg</u> command link to its Web page to enable patrons to self-register.



Ecommerce

The Ecommerce product allows organizations to accept online credit card payments for fees and fines displayed in the patron record display as well as for donations.

Ecommerce requires the following:

- A secure gateway service using Verisign's PayflowPro.
- A high bit SSL certificate on the Web OPAC (e.g., 128-bit in the United States). For more information on purchasing SSL certificates, see the Web OPAC SSL FAQ on CSDirect.
- An Internet merchant account through a provider who works with Verisign's PayflowPro API (e.g., Merchant eSolutions). A non-framed appearance in the patron record display (i.e., the first field of the MY_WEBPAC Web option must be set to "false").

Alternate Languages

Setting up the WebPAC for use with alternate languages affects all the fundamental elements.

While the use of an alternate language does not affect presentation as such - it does not allow the use of separate stylesheets for example - the library will have to create graphic files for all language dependable buttons and images. However, the emphasis is on functionality and content. This section will discuss all the necessary areas from the viewpoint of preparing for alternate languages.

Introduction and Prerequisites

Libraries who have acquired the Web OPAC User Interface Languages product (Product Code 160) can customize their WebPAC to offer interfaces in the languages that they have purchased.

The WebPAC can be presented in one alternate language only, with or without English as a complement, or in multiple languages. When multiple languages are present, the library can set a default language for the WebPAC.

Customization of the WebPAC for this purpose is complex and includes many areas. Innovative is responsible for some parts, especially during installation, but the library bears the main responsibility for customization and maintenance. For example HTML files and graphics need to be created, translated and customized, Web Options have to be customized and labels translated. All areas are discussed in the following sections, from the viewpoint of preparing for alternate languages. For full details about each feature, please refer to corresponding sections in this tutorial. The last section contains a suggested workflow with tips on how to get started.



If the library will use only one alternate language, and *not* offer English, the process is simplified. Please refer to the discussion of Web Option LANG in <u>Setting default language</u>.

Basic Setup

The first step in the process is to enable your system to recognize the language(s) you have purchased. This is done by Innovative and will automatically activate the ability to translate labels and code values and to create files with the appropriate [lang] extension. Innovative will inform you of the code that is used as extension for each language, **spi** = Spanish, **ara** = Arabic.

The code is always three letters, but is not always the same as the international standard language code.

When your system is installed it comes with a standard set of files:

• A file with translations of system generated messages and texts. This file contains translations of e.g. error messages ("Sorry, the information you submitted was not valid") and texts that appear on default forms ("Please type in your comment").

Updated files are offered on a regular basis and can be downloaded using option **Admin - Install Latest Translations** in Millennium Administration. Missing translations can be requested via a <u>Service Commitment on CSDirect</u>. In this tutorial the file is referred to as the 'general translation file'.

- Generic HTML files and graphics with the appropriate [lang] extension. Normally they are duplicates of corresponding English files and act as placeholders to guide you and ensure that your WebPAC is functional for testing while you work on translation and customization.
- For some languages a set of Web Options for the alternate language(s) may also be offered at installation.

In addition to this you may be asked to provide translations of:

- · Field labels
- · Index labels
- · Options for limiting
- Other information that is kept in separate files, unique to each library. This will vary depending on your setup and the products you have purchased.

If a library staff member has taken the ASAA workshop (Advanced System Access and Administration) the library can maintain some of these files from Millennium Administration.

Values from some fixed fields are displayed in the WebPAC and you need to ensure that all code descriptions have proper translations. Some typical examples: item information normally includes Location and Status, and Material Type from the bibliographic record is usually one of the limiting options.

Naming Conventions

The general rules for <u>naming files</u> must be followed. To furthermore let the system know a HTML page should be used for a certain language, append the three letter language code to the file name, preceded by an underscore. The code must be in lowercase:

mainmenu_tur.html - the Main Menu page in Turkish.

Graphic files are customized by language in the same way as HTML files, by adding the three letter language code to the file name:

startover.gif - English Start Over button

startover_por.gif - Portuguese version of the button

If the graphic file is going to be used with a BUT_ Web Option, it is of extreme importance that the whole file name is consistent for all languages, and that the file is in GIF format. That is because BUT_ options cannot vary by language. Instead the variation is done by naming the corresponding gif files consistently:

mystartagain.gif - name of English Start Over button

mystartagain_spi.gif - name of corresponding Spanish button

The only Web Option you need is:

BUT_STARTOVER = /screens/mystartagain.gif

NOTE: the .gif extension has to be included in the value of the Web Option, otherwise results may be unexpected. For further details, refer to *Innovative Guide & Reference*, Page #106916 <u>Graphic Buttons</u>.

When a user is running the WebPAC in Spanish the server will look for a file named mystartagain_spi.gif. If there is no such file it will use the mystartagain.gif instead.

For Web Options that can vary by language, append the language code to the option name in the same manner as for files:

STARTOVER - English version

STARTOVER_ITA - Italian version

The language code can usually be either upper or lower case.

To vary a command link by language, append an asterisk and the language code:

/search - link to English OPAC Menu, opacmenu.html

/search*por - link to Portuguese OPAC Menu, opacmenu_por.html

Forms, files and functions

To have a fully functional WebPAC in more than one language there are a number of files and options that have to be created and defined. There must be translated versions of the pages in the /screens directory, versions for each language of all Web Options that affect language, and page links must be set correctly. Graphic files and images for all functions affected by language must also exist.

We start with a discussion of some important principles regarding Web Options, which are behind many functions in the WebPAC.

Web Options

Web Options are used to control many areas of your WebPAC. Where specified in Web Option descriptions, you can vary settings by language. To vary by language append the three letter language code to the option name. If an option for the current language does not appear in the Web Options file, WebPAC uses the default Web Option setting (i.e., the option without a language extension). This means that you have to have all language dependent Web Options set for each language, or your WebPAC will not behave as expected.

From the viewpoint of setting up your WebPAC for alternate languages you need to consider:

- . Web Options that control the default language of the WebPAC and how to change language discussed in Setting default language
- . Web Options that contain textual parts or point to HTML or image files with language elements
- . Web Options that redirect users to other pages

Some examples of Web Options from the second category are <u>TOPLOGO</u> and <u>SORT_BROWSE</u>. They are used below as examples of how to customize by language.

TOPLOGO specifies an image, text or external HTML file to display on the top line of WebPAC screens. On customized forms it can be called by token {toplogo}, on system generated pages it will appear automatically.

Example:

English version: TOPLOGO=@screens/toplogo.html

On English pages this may result in the following display:



Vietnamese version: TOPLOGO_VIE=@screens/toplogo_vie.html

On Vietnamese pages this may result in the following display:

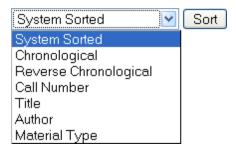


The BOTLOGO Web Option works in the same way to define the image or text to display on the bottom line of WebPAC screens.

The SORT_BROWSE option controls the sort options offered to users during phrase index searches, and the labels associated with those sort options. On some customizable forms it can be called by a token. On system generated pages it appears automatically where appropriate.

English version:

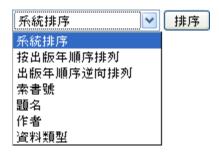
SORT_BROWSE=C: Chronological|R: Reverse Chronological|N: Call Number|T: Title|A: Author|M: Material Type|



Chinese version:

SORT_BROWSE_CHT=C:按出版年順序排列|R:出版年順序逆向排列|N:索書號|T:題名|A:作者|M:

資料類型|



Note that you often have to use HTML coding for diacritics, while it sometimes works to simply type in the diacritic as is. You may have to exercise some trial and error to find out what works best.

SORT_BROWSE_SPI=C:Cronol&coacute;gico|R:Cronolćgico
Revés|N:Signatura|T:Titulo|A:Autor|M:Formato de Material|

SORT_BROWSE_CHT=C:按出版年順序排列|R:出版年順序逆向排列|N:索書號|T:題名|A:作者|M:資料類型|

So called <u>BUT_options</u> are one of the Web Option types that control graphics. Unlike other options you do not need to vary the <u>BUT_options</u> by language. Instead the variation is done by naming the corresponding gif files consistently:

startagain.gif - name of English START OVER button

startagain_spi.gif - name of corresponding Spanish button

The only Web Option you need is: BUT_STARTOVER = /screens/startagain.gif

When a user is running the WebPAC in Spanish the server will look for a file named startagain_spi.gif. If there is no such file it will use the startagain.gif instead.

Note that the ICON_ options need to vary by language. Unlike BUT_ options they can contain textual parts instead of, or as a complement to, directions to a file

Web Options that redirect users to other pages include:

- STARTOVER and XSTARTOVER
- PSTARTOVER
- TIMEOUT

The three startover options can all vary by language. You could for example have the following: STARTOVER=/search STARTOVER_CHT=/search*cht

When the session language is English the *Start Over* button will send the user to the English opacmenu.html, when the session language is Chinese the Chinese version of *Start Over* will send the user to the Chinese opacmenu_cht.html.

The TIMEOUT option cannot vary by language. However, the system will 'remember' the language and redirect the WebPAC to the [lang] version of the page set for TIMEOUT.

A typical setting of TIMEOUT is:

TIMEOUT = 300; URL=/search

After five minutes (300 seconds) of inactivity the screen will go back to /search = opacmenu.html. If the session language was Vietnamese before the timeout was triggered the screen will instead go back to /search*vie = opacmenu_vie.html.

Library-customizable pages and forms

Standard HTML pages, such as mainmenu and opacmenu, need to exist for each language. They are separated from each other by the language extension:

mainmenu.html - English version mainmenu_spi.html - Spanish version mainmenu_cht.html - Traditional Chinese version

Optional pages can be used to replace system generated default forms, such as the patron verification form. Refer to the next page for a detailed discussion of optional pages.

Other HTML pages are created as needed, and can exist in one or more languages; i.e. the design of the WebPAC can to some extent differ between languages.

Normally you will have a set of pages in English with the appropriate [lang] extension to start with. The example set includes all standard pages but also many optional pages. If the library chooses to keep these pages rather than create their own, the content of the pages needs to be translated, and links also need to be adjusted so they point to pages in the correct language. Typically there are two types of links:

- Specific link to a named page, such as Help
 To link to the corresponding page in Italian you need to have a help_index_ita.html file and change the link to something like:
 Aiuto
- Links using commands, such as /search.
 This link takes you to the opacmenu.html page. To have it point to the Italian version of the opacmenu (opacmenu_ita.html), you add an asterisk and the language code: /search*ita.
 Not all command links need the language extension. Some of them will work correctly anyway, because their use is not language specific, e.g. / clearhist which clears the Search History list.

For additional information, refer to the Innovative Guide & Reference, Page #106855: Command Links.

Tokens themselves cannot be varied by language. The context decides which language they will use. They can only interpret language on standard ('mandatory') pages and system generated pages and forms. Therefore they will not work correctly for alternate languages on non-standard pages, even though the page in question may seem to support the token (most commonly <!--{toplogo}--->). You should always use actual coding on such pages.

For a complete list of customizable forms, refer to Innovative Guide & Reference, Page #106941: Customizable Web OPAC Forms.

For example the <!--{availlim}--> token is used to call a checkbox with text. The text is set with Web Option AVAILLIM that you need to define for the language you are working with. In some cases a token starts a chain reaction. The <!--{toplogo}--> token for example will look at Web Option TOPLOGO that in turn is usually pointing to a file. You need to define the Web Option for the language as well as have an appropriate version of the file it is calling to make it work correctly.

Some tokens will generate text messages from the server, for example the <!--{holds}--> token. The message text is provided by the general translation file.



Tokens themselves cannot be varied by language. The context decides which language they will use. They can only interprete language on standard ('mandatory') pages and system generated pages and forms. Therefore they will not work correctly for alternate languages on non-standard pages, even though the page in question may seem to support the token (most commonly

<!--{toplogo}-->). You should always use actual coding on such pages.

Optional pages vs default forms

Optional pages are pages that can be used to replace the system generated forms that exist in many places in the WebPAC. Most libraries prefer to create their own versions of these forms. The example set contains customized versions of many forms.

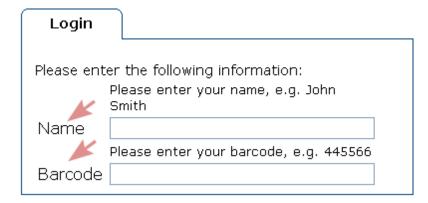
If there is a customized form for a specific function the system will use that instead of the system generated default form. For example, command link / suggest uses the Suggestons Form, suggest_web.html. Correspondingly /suggest*spi uses suggest_web_spi.html.

If there is no customized form with the **[lang]** extension the system will use the English equivalent. If the English form is used any straightforward HTML will display in English, while system generated text or buttons (generated by tokens, Web Options or hardcoded behavior) will be in the other language, provided options and buttons exist for that language.

If the English form does not exist either, the system will display the default form in the alternate language. Translations for default forms are kept in the general translation file and should appear in the correct language without any specific action from your side.

Some parts of a default form may be controlled by other settings:

• Forms with patron verification prompts use information from OPAC option <u>Patron self-identification prompts & examples</u>. Prompts and examples must be translated.



TIP: In order to add translations, log in to the character based system with a login assigned to the language in question, or change language from the main menu.

• Another example is the standard buttons that are used across all pages, for example:





You will also have the toplogo and botlogo on all pages, regardless of what type of form you are using.

To see an example of the use of an optional form vs the default, refer to Options for limiting searches.

Command link /ftlist is a special case. This command link gives access to the Featured Lists function. There is no corresponding customizable form you can use. Like other command links it can vary by language by adding *[lang], e.g. /ftlist*ita for the Italian version of Featured Lists. Some text is defined in Web Option FEATURED_LIST that needs to be customized for the language.

Graphic Files

Graphic files can be buttons, material type symbols or other images. Their use is defined by tokens on the customized forms, by optional Web Options, or by hardcoded behavior. In either case a BUT_ or ICON_ Web Option is normally used to define which file to use.

For additional information, refer to the Innovative Guide & Reference, Page #106916: Graphic Buttons.

Graphic files are customized by language in the same way as HTML files, by adding the three letter language code. Note that naming conventions are extremely important for files used by the BUT_Web Options.

In some cases the system will supply a default button or a text link. Default buttons are usually easily identified by their grey color:



The text on the default buttons is provided by the general translation file. Most of these system generated buttons can be replaced by customized graphics or text links. This is indicated in the description of the appropriate customized form or Web Option.

Example of using customized buttons where possible:



Search Results

<u>Search results</u> are always presented on a system generated page. The format of the page depends on the result of the search: a direct hit, a record or index browse, or a 'no-hit'.

These pages can be customized using Web Options, specialized forms, and style sheets.

As part of a search the user may limit the result. Options for limiting searches are specific to each library, although most libraries use similar options. The options are either presented directly on the search help page (keyword searches) or on the Limit/Sort form (phrase searching).

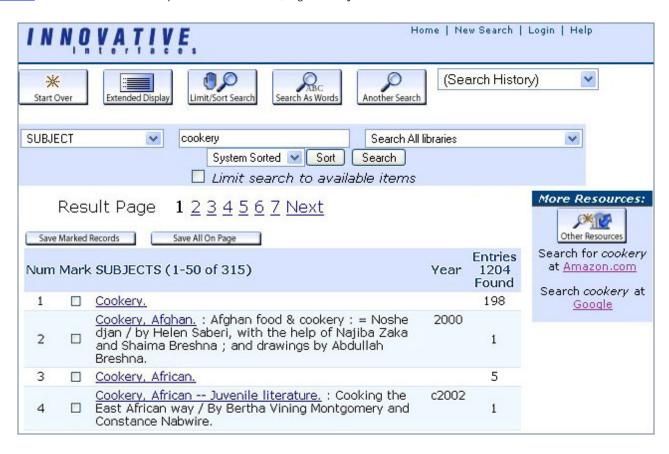
Regardless of format, all pages use the TOPLOGO and BOTLOGO Web Options to define which toplogo and bottom logo to display. The standard navigation buttons are also used across all pages regardless of the page format.

This section describes the elements of the various search results forms in some detail, all from the viewpoint of preparing your WebPAC for alternate languages.

Browse Lists

There are two types of browse lists: index browses and record browses.

An index browse contains entries from the phrase index searched, e.g. the subject index:



This screen is not using a form, instead it is a combination of Web Options and some hardcoded pieces. For example, the use of navigation buttons is hardcoded but the buttons can be customized. Some other buttons, e.g. *Sort* and *Search* are hardcoded and can't be customized. Some elements on the screen can be customized using Web Options, but will otherwise use system defaults, such as some of the column labels.

For an overview of most elements used on an index browse screen, refer to the *Innovative Guide & Reference*, Page # 106890: <u>Navigating the WebPAC</u>
Browse Display.

The general translation file provides translations of default texts and buttons. It also contains translations of any system generated message that appears on the screen. The index browse is also using values from files defined for each library, e.g. the index labels and the options on the scope menu:



Same search in Spanish:



("Limit search to available items" displays in English on the Spanish screen because the governing Web Option, AVAILLIM, is defined in English but there is no corresponding Spanish version)

A record browse is a list of bibliographic records:



The top and bottom parts use the same settings as the index browse. The display of bibliographic information is defined by the <u>Brief Citation Form</u>. This form can vary by language:

briefcit.html - English version

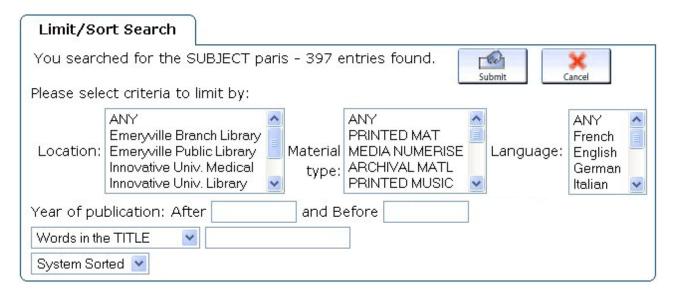
briefcit_tur.html - Turkish version

For additional information, refer to the Innovative Guide & Reference, Page # 107034: Brief Citation Form.

Texts triggered by tokens get translations from the general translation file, e.g. hold messages. Pay attention to the Web Options that some tokens use, and make sure corresponding options are set for all languages.

Options for limiting searches

Options for <u>limiting searches</u> can be customized for each library. The standard options are similar to what you see on this screen:



This is a post-search limit, used to limit results from a phrase index search.

The values listed in the Location, Material type and Language tables are kept in separate files and can vary by language. The Location and Language tables are modified versions of the tables used to populate location and language fields. These tables are maintained by Innovative, and you will be asked to supply wording and translations as part of implementation, or when you request additions or changes. If a library staff member has taken the ASAA workshop (Advanced System Access and Administration) the library can maintain the tables from Millennium Administration.

The Material type table is either the standard table used to populate the Material Type field in bibliographic records, or a modified version specifically created for limiting. If the standard table is used, code values are translated from any Millennium staff module (menu Admin - Parameters - General - Fixed-length codes). If the library uses a modified version, the table is maintained by Innovative.

Your library may have other limit options that work the same way.

Labels for the dropdown options (Words in the ...) are translated in another file maintained by Innovative. These translations can be customized for each library as well.

The sort dropdown is governed by the optional Web Option SORT_BROWSE which can vary by language.

Some generic expressions, like 'ANY' and 'System Sorted' get translations from the general translation file.

This page uses the Limit/Sort Display Form, srchmod.html, which can vary by language:

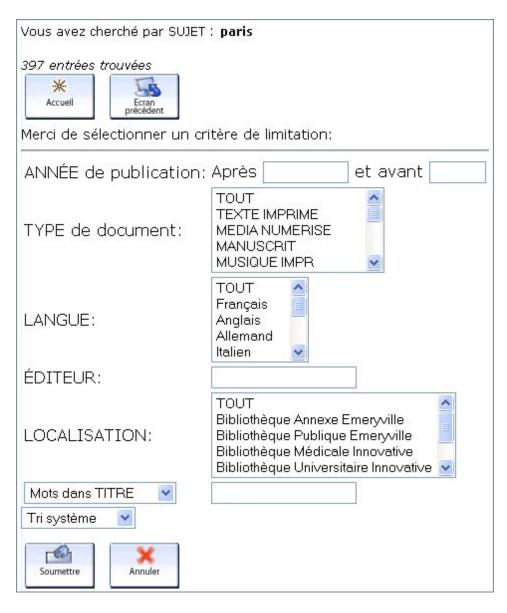
srchmod.html - English version

srchmod_frf.html - French version

If there is no srchmod_[lang].html file on your system the English srchmod.html will be used, with translations displaying where they are taken from the general translation file or from other translated files:



If there is no srchmod.html either a default form will be used instead. In this case, all generic translations come from the general translation file:



The search limits used in keyword searching are basically the same as the post-search limit options, and use the same files to get translations. The <u>Advanced Boolean Search Help Page</u>, <u>srchhelp_X.html</u> can be customized by language:

srchhelp_X.html - English version

srchhelp_X_frf.html - French version

Record Display

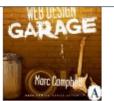
The full display of bibliographic records contains a number of modular components. With WebPAC Pro a customizable form is used to get even more control of the display.

The most important part of the full record display is the list of fields with labels and content. A bibliographic record presentation in Swedish could look like this:

Namn <u>Campbell, Marc (Marc R.)</u>

Titel Web design garage / Marc Campbell

Utgivning Upper Saddle River, N.J.: Prentice Hall PTR, 2005



PLACERING		HYLLPLATS	STATUS	MEDDELANDE		
HB:Konst/Musik Designbiblioteket		<u>Grafisk</u> <u>design</u>	TILLGÄNGLIG	LÅN 14 DAGAR		
Omfattning xvii, 530 s. : ill. ; 24 cm						
Serie	The garage series : street-smart books about technology					
Anmärkning	Marc Campbell presents a hands-on guide to designing and building websites that are not tedious and boring. The text gives practical, quick solutions to common design and usability problems					
Ämnesord	Webbsidor Design					
	<u>Designbiblioteket</u>					
	Grafisk formgivning					
	Grafisk design					
Klassning	Ifq.5					
	Pucbb					
Språk	engelska					

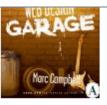
The same page in English will have English field labels, column headers, status and message values:

Author Campbell, Marc (Marc R.)

engelska

Title Web design garage / Marc Campbell

Imprint Upper Saddle River, N.J.: Prentice Hall PTR, 2005



LOCATION		SHELFMARK	STATUS	MESSAGE		
HB:Konst/Musik Designbiblioteket		<u>Grafisk</u> <u>design</u>	CHECK SHELF	14 DAY LOAN		
Descript	Descript xvii, 530 s. : ill. ; 24 cm					
Series	The garage s	The garage series : street-smart books about technology				
Note	building webs	Marc Campbell presents a hands-on guide to designing and building websites that are not tedious and boring. The text gives practical, quick solutions to common design and usability problems				
Subject	Designbibliote Grafisk formg	<u>Webbsidor Design</u> <u>Designbiblioteket</u> <u>Grafisk formgivning</u> Grafisk design				
Classmark	Ifq.5 Pucbb	-				

The language of the variable fields will be whatever the record was cataloged in and doesn't change. Fixed fields can have values in alternate languages and may change depending on the language used for display. (Status and Message fields in the example above - Location can also be translated) Code values are translated from any Millennium staff module (menu Admin - Parameters - General - Fixed-length codes).

At the bottom of the structure is the Record Display Definition file, <u>webpub.def</u>. It allows staff to define the fields to display, the order in which they should appear on a record display and the labels that should be used for each field group tag or for individual MARC tags. The file can vary by language:

webpub.def - English version

webpub_swe.def - Swedish version

Language

The rest of the the full record display is governed by hardcoded behavior (mainly the standard navigation buttons), Web Options and the Bibliographic Record Display Form. This form can vary by language in the usual way:

bib_display.html - English version

bib_display_swe.html - Swedish version

For additional information, refer to the Innovative Guide & Reference, Page # 106854: Bibliographic Record Display Form.

Setting default language and change language

The WebPAC can be presented in one, two, or more languages. Setup depends on which alternative the library chooses.

For more information about the Web Options described below, refer to Innovative Guide & Reference, Page #106921 Language Handling Options.

• If the WebPAC will be in one language only, and that is a language other than English, (i.e. no alternate languages are offered), use Web Option LANG.

When this option is used, the library must create Main Menu and OPAC Menu files for the specific language, e.g. mainmenu_thx.html and opacmenu_thx.html for a WebPAC in Thai. There is no need to have language specific versions of other files, and all Web Options can be used without language extensions.

• If more than one language is offered, and the default language should be something other than English, use Web Option ROOTLANG.

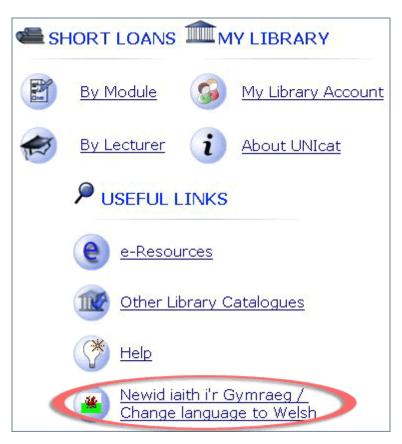
This option specifies the language used by the Main Menu command link ("/"). It means that a link to the "root" URL, e.g. http://ourlibrary.millennium.edu/ will lead to the Main Menu of the language defined in ROOTLANG, e.g. mainmenu_spi.html if ROOTLANG=spi.

If the library has a multi-language WebPAC it is necessary to offer users links to the alternate language(s). This can be done by including links on any customizable HTML page, or in the toplogo files.

The advantage of using the toplogo is that users can change language at any time regardless of where they happen to be in the WebPAC: looking at a search result, a search help screen or the Main Menu:



This method is often used by libraries whose users prefer one or the other (or the third) language, while libraries whose users are mainly using the "root" language may offer a link to the other language(s) on the Main Menu only:



In most cases libraries prefer to link users to the OPAC Menu page of the alternate language, e.g.

Change Language to English

Another possibility is to offer links to some key functions in multiple languages, e.g. in the toplogo files:



It is possible to offer a list of languages on a separate page by using command link <u>/weblang</u>. This command link works together with Web Options LANGLIST and (optionally) DIACLIST.

Getting Started

NOTE: these instructions refer to WebPACs in multiple languages. The process is simplified if the WebPAC will be presented in one language only - see the previous page.

Once decisions have been made regarding design and functions to be used, the work on setting up the WebPAC for alternate language(s) can begin.

- If the library will use the example set, translate all HTML pages that are going to be used. Create new pages as needed, using appropriate naming conventions. Pay special attention to links. Make sure all command links have the correct language extension. Make sure links to specific HTML pages or graphic files are pointing to files with the correct language extension and that those files actually exist.
- Create/edit the webpub_[lang].def file(s) to correspond with the webpub.def file.
- · Create graphic files for all buttons and other images that are language dependent. Name them consistently for all languages.

TIP: Sort files by Type in the live or staging directory in Web Master mode. Grouping all gifs together makes it easier to see if anything is missing or if the names don't match.

- Check Web Options
 - o First of all, set the "startover" options so that navigation will work across all pages.
 - check through the option groups and add versions with appropriate language extension for all options that must vary by language. Generally speaking, that should be any option that can contain a piece of text and/or refer to a file.
 - o If the default language should be something other than English, set the ROOTLANG option
- Translate OPAC option Patron self-identification prompts & examples as desired.

TIP: In order to add translations, log in with a login associated with the appropriate language, or change language from the main menu.

• Test thoroughly. Use all available indexes to search; look at displays; use buttons and other links; test optional functions; log in as a user and try out all functions offered.

A tip for troubleshooting: it is easy to compare any page with the same page in another language by tweaking the URL. The URL for a WebPAC page in an alternate language always contains the language code, like this:

http://ourlibrary.millennium.edu/search*fin/a?SEARCH=jones&SORT=D&searchscope=1&submit=L%C3%A4het%C3%A4

To view the same page in English, simply remove the language code element and reload the page (hit **<Enter>**). Alternatively, from an English page add the language element (*[lang]) and reload the page.

Some common problems and their solutions:

- The Home/Start Over button is displayed in the correct language, but it links to the English Opac menu (or other English page).
 - The behavior of this button is governed by Web Option STARTOVER. Most likely STARTOVER_[lang] is missing.
 - XSTARTOVER and PSTARTOVER work in the same way.
- The toplogo_[lang] file has a "Home" link that does not work. It links to the English home page.
 - o This is probably related to the use of a command link, such as "/" (mainmenu) or /search (opacmenu). The command link needs a language extension, e.g. /search*rus.
- A search in one or more of the indexes results in an English index browse or record display, even though it started at a page in the alternate language, e.g. /search*rus/d (srchhelp_d_rus.html).
 - Check the HTML in the file. The link for the Submit button is probably 'hand coded' and set incorrectly. Change it to link to the correct language.
 - **TIP**: on most pages token <u>{submit}</u> can be used. It will look at the language and link correctly. The linking will be correct even if the corresponding Web Option does not exist for the alternate language.
- A navigation button, e.g. Another Search, displays in English even though there is an anothersearch_[lang].gif file and the BUT_ANOTHER_lang] option is set to use that file.
 - Firstly, BUT_options cannot vary by language, so BUT_ANOTHER_[lang] is ignored.
 - Then, if the name of the file is not consistent with the English file name, the system will use the English file defined in BUT_ANOTHER.
 - o For more detail, refer to the Naming conventions section of this tutorial.
- · A form displays in English, although the navigation button or command link is set correctly for the alternate language.
 - o Check if an optional page or form is used, e.g. srchmod.html (Limit/Sort form). If so, you also need a srchmod_[lang].html. Create it, or disable the English form, e.g by renaming it slightly. The system will then use its own default form instead, and translations will be provided by the general translation file.
 - Refer to Optional pages vs default forms in this tutorial for a description of how the system treats optional pages in reference to alternate languages.
- Toplogo_[lang].html exists and works fine except on certain pages, such as help_[lang].html, where the toplogo is in English.
 - This is likely related to the use of token {toplogo}. The token only works on pages that are system generated or called by command links. On all other pages the toplogo has to be coded directly on the page, because the system cannot interpret the language context.
- Some parts of a search result page are in English and it is difficult to figure out how to fix it.
 - This is probably caused by missing Web Options.

 Refer to the *Innovative Guide & Reference*, Page #106890: <u>Navigating the WebPAC Browse Display</u> and Page #106872: <u>Search Results</u>

 Options to help identify the options that are used and that need to vary by language.

- A user is searching the WebPAC in the alternate language but the record display is in English.
 If all or some field labels are in English it means webpub [lang].def is missing or incomplete.
 If the record content is in English, this is correct the language will be whatever the individual record was cataloged in and does not

WEBPAC SITE MAP

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WebPac

This tutorial introduces the management of WebPAC Pro using the Millennium Administration module and the Web Master and Web Options modes.

