

# Web Public Search

The Web Public Search (also called *WebOPAC*) is a function for publishing your catalogue online. The library readers may query your catalogue, check the titles availability, reserve titles, check their account, renew their current loans, modify their address etc. On your side, you can get the statistics of the queries sent by your readers.

This document describes how to set up the web public search, how your readers can use it and the different kinds of statistics you can get.

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## 1. Operation principle

The WebOPAC server is a function of the BiblioMaker system that lets a library publish its catalogue on the web. Remote users can query the catalogue using their web browser.

The WebOPAC server functions in the following manner : processes are running on the server, waiting for requests. When a request using the HTTP protocol is received, it is analysed and handled : a search is performed in the database. The search result (a list of records) is sent back to the remote user as a HTML file.

The WebOPAC server is completely integrated in the BiblioMaker system and uses no external CGI executable. Therefore, it does not need any further application such as *Internet Information Services (IIS)* from Microsoft or *Apache*.

### 1.1 Single-user architecture

With a single-user version of BiblioMaker, the workstation is the web server. The WebOPAC server runs in the background while the user catalogues, searches records, prints lists or registers loans.

The constraint of this architecture is the need for the BiblioMaker application to run, otherwise the web server will not respond to requests. This is why the user shall not quit the program or turn his computer off.

If you don't want to transform your workstation in web server, you have the choice between two options :

- Install a copy of the program and of the data file on a web server. You will then have to copy regularly the data file from the workstation (or from a file server) to the web server.
- Use the client-server version of BiblioMaker to configure the BiblioMaker server as a web server. In this case, the workstation is not used as a web server.

N.B.: Using a client-server version of BiblioMaker implies a modification of its licences. Please contact Micro Consulting in order to get further information about this topic.

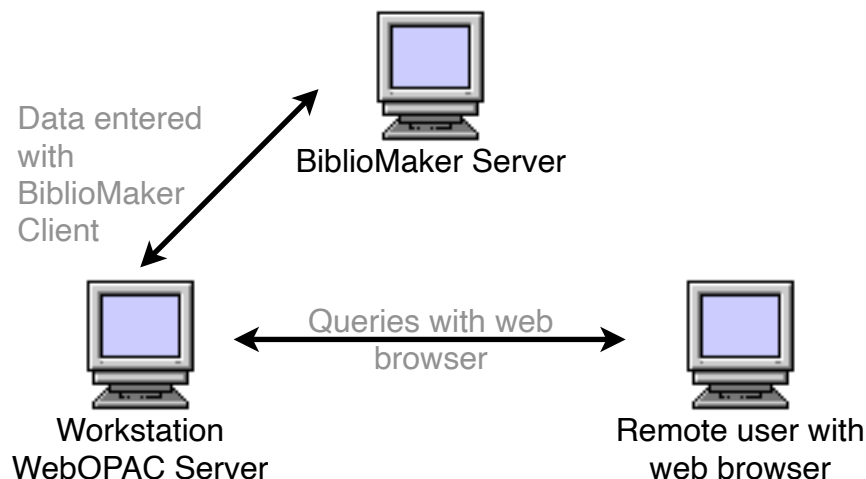
You will find information about setting up the WebOPAC server in the chapter called *Setting up the WebOPAC*.

## 1.2 Client-server architecture

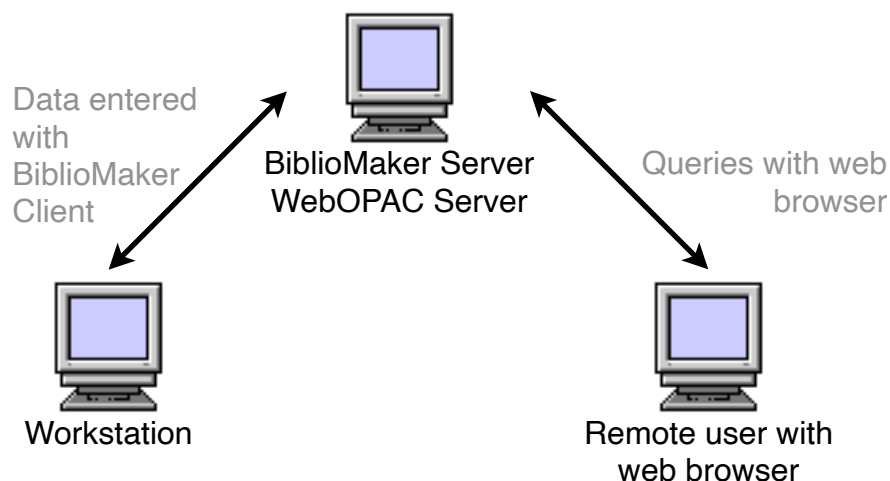
In multi-users mode, BiblioMaker uses the client-server architecture; it means that two applications are used : BiblioMaker Server on the server and BiblioMaker Client on the workstations. The data file is obviously hosted by the server.

With this architecture, the WebOPAC server can be hosted either by a client computer (1st option) or by the server (2nd option).

### 1st Option



### 2nd Option



The second option gives the quickest response time, as all operations (reception of the queries, search in the database, answers send back) are performed on the same computer. Nevertheless, with the first option you can set up several WebOPAC servers concurrently, all of which will query the same database (*load balancing*). Another advantage of the first solution : you can protect your BiblioMaker server by putting it into a secured network zone and the WebOPAC server could be placed into a DMZ.

BiblioMaker in the Cloud uses the second option.

### **1.2.1. WebOPAC server on a client computer (1st option)**

If you have decided to use a client computer as an WebOPAC server, you can set it up with the BiblioMaker Client application that must be installed on this computer.

The WebOPAC server uses pages in the HTML-format delivered with the single-user version of BiblioMaker. These pages contain forms and templates for displaying the found records. Therefore, you must copy on the computer used as a web server the folder called *OPAC\_Web* you will find in the folder containing the BiblioMaker application on the BiblioMaker server. The exact path of the *OPAC\_Web* folder on the WebOPAC computer's hard disk is not relevant.

Please read the chapter *Setting up the WebOPAC* if you need further information about the options of the WebOPAC server.

The client computer and the BiblioMaker server communicate using the TCP ports 19812, 19813 and 19814 by default. If a firewall protects your server, do not forget to open these ports.

The computer used as an WebOPAC server can be used also as a normal workstation (the WebOPAC server runs in the background). But the BiblioMaker Client application must be running for the WebOPAC server to answer the queries. This is why you should inform the users of this computer that they shall not quit BiblioMaker Client.

### **1.2.2 WebOPAC server on the BiblioMaker server (2nd option)**

Because of technical constraints, BiblioMaker Server does not contain a user interface for setting up the WebOPAC server. The server could be theoretically be set up from a client computer. Nevertheless, some options (for instance, the IP address of the WebOPAC server and the path to the homepage) depend on the WebOPAC server's configuration. This is why we recommend to define the parameters of the WebOPAC server with the BiblioMaker Client program installed on the server.

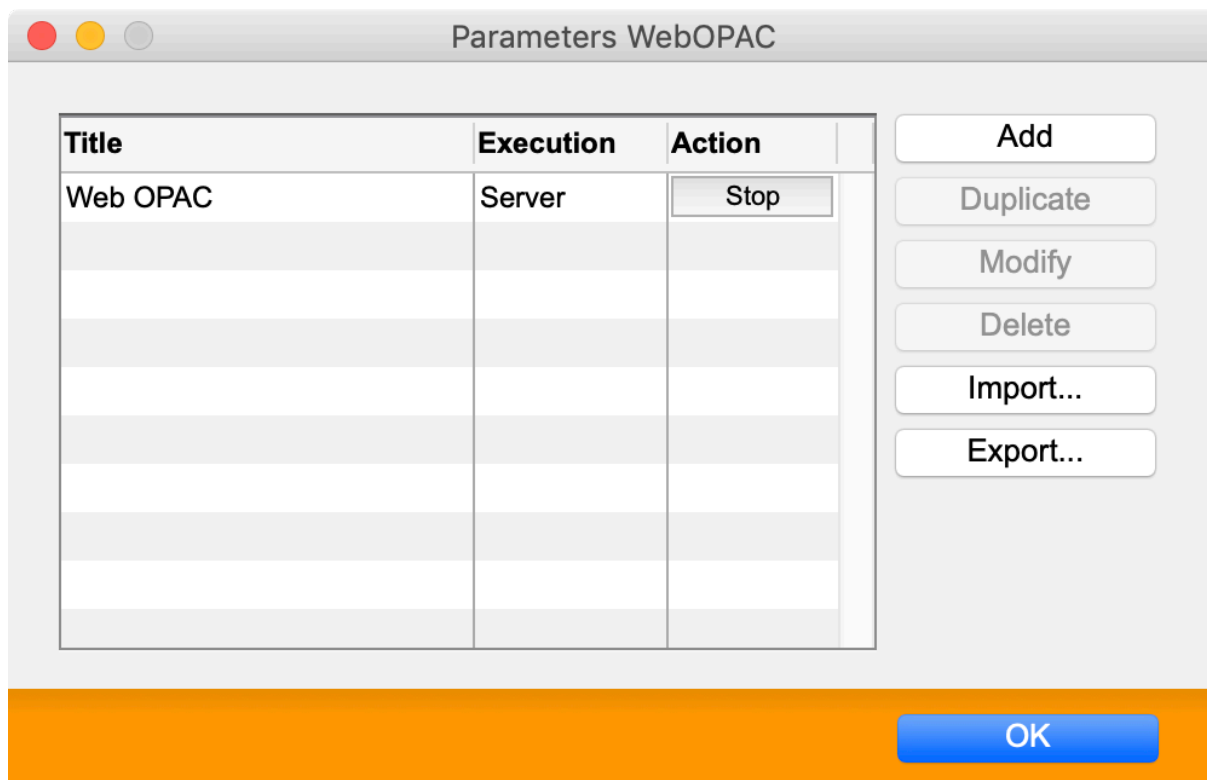
With BiblioMaker in the Cloud, the WebOPAC server basic settings are set up by Micro Consulting.

Please read the chapter *Setting up the WebOPAC* if you need further information about the options of the WebOPAC server.

## 2. Setting up the WebOPAC

You set up the WebOPAC server with the BiblioMaker (Client) application. If the WebOPAC server is hosted by the BiblioMaker server, please use BiblioMaker Client installed on the web server. If the web server will be hosted by a client computer, you have to connect to the BiblioMaker server with BiblioMaker Client from the future WebOPAC server.

You set up the WebOPAC by calling the **Configure the web public search** command in the **Other** menu of the **Maintenance**. If several user accounts have been defined in the BiblioMaker application, only the Administrator will be allowed to access the configuration dialog.



*The **Execution** column is not displayed with the single-user version of BiblioMaker.*

You can define several configurations for the WebOPAC (for instance one configuration for a WebOPAC server located inside your local area network and another configuration for a WebOPAC server located at an Internet service provider who publishes your catalogue on the web). This is why a dialog box displays the several defined configurations. If you want to create a new configuration, click on the **Add** button (or on **Duplicate** if you want to keep the settings of another existing configuration).

As there are many parameters for the WebOPAC, the configuration dialog is divided in several pages.

With BiblioMaker in the Cloud, only tabs containing settings for librarians are displayed.

## 2.1 Web server tab (not available in the cloud version)

The screenshot shows a macOS-style window titled 'Modification Parameters WebOPAC'. It has several tabs: 'Web server' (selected), 'Authorisations', 'General', 'LDAP', 'Security', 'E-mails', and 'Library info'. The 'Web server' tab contains the following fields and options:

- Configuration:** A text field containing 'Web OPAC'.
- Automatic startup of the server:** A checked checkbox.
- Web server running on a client computer:** An unchecked checkbox.
- Filter queries:** An unchecked checkbox.
- IP address:** A text field containing '192.168.144.31' with a dropdown arrow.
- TCP port number:** A text field containing '19819'.
- Number of processes:** A text field containing '4'.
- Size in bytes:** A text field containing '128 000'.
- Main Folder:** A text field containing ':OPAC\_WEB' with a 'Path...' button to its right.
- Home Page:** A text field containing ':TEMPLATE:French:Main.htm'.
- Activities log (file WebOPAC Log.txt):** An unchecked checkbox.
- Queries log:** A checked checkbox.
- Auto. delete after:** A text field containing 'days' with a 'Delete all' button to its right.

At the bottom of the window are 'Cancel' and 'OK' buttons.

**Configuration** : configuration's name. Each configuration must have a unique name.

**Automatic startup of the server** : check this box if you want the web server to start during the software startup.

**Web server running on a client computer** : check this box if the integrated web server must run on a client computer and not on the BiblioMaker server.

**IP address** : enter the IP number or the computer name which the web server must run on.

**TCP port number** : define the web service's port number. Standard ports are 80 and 8080. On the Mac, the 80 port number is usually reserved. Caution, don't define a port number already on use by another service on the same computer.

**Number of processes** : usually 4 is enough. If you expect to receive many simultaneous queries, you may define a value greater than 10.

**Size in bytes** : size of each process in random access memory. By default, 128'000 are enough.

**Main folder and Home Page** : homepage's path. The homepage is a HTML file located on the web server's hard disk. Use the **Path...** button in order to select the file. By default, the main folder (folder called *OPAC\_Web*) is located inside the folder containing BiblioMaker's single-user version. The homepage is located inside this folder, in a subfolder called *Template*, then in another subfolder sporting the interface language name (for instance *English*) and its name is *Main.htm*.

**Activities log** : tick this box only temporarily, if you have problems with the web server.

**Queries log** : tick this box if you want the program to save each received query in order to get statistics about the use of the online catalogue.

**Auto. delete after x days** : define here how long the period of time before statistics must be deleted. The 0 value means no statistics record is deleted.

## 2.2 Authorisations tab

Modification Parameters WebOPAC

Web server | **Authorisations** | General | LDAP | Security | E-mails | Library info

**A reader may:**

- ☒ check his current loans and reservations
  - ☒ modify his address
  - ☒ modify his password
  - ☒ query his past loans
  - ☒ renew his loans
    - ☒ even if other loans are overdue
    - ☒ even if the date of return is over
    - ☒ even if the title is reserved
    - ☒ despite balance
  - ☒ cancel his reservations
- ☒ reserve titles
  - ☒ even if a copy is available
  - ☒ despite overdue loans
  - ☒ despite balance
  - ☐ Mandatory password

**Loans in self-service**

- ☒ Enable loans in self-service
  - ☒ Borrow titles
    - ☒ Allow new loans despite overdue loans
  - ☒ Return titles

**The following readers are allowed to borrow titles:**

- ☒ Contact
- ☒ Donateur
- ☒ Editeur
- ☒ Fournisseur
- ☒ Imprimeur
- ☒ Lecteur

**Private access**

- ☒ Activate Private access

**Period of validity of a session** 24 Hours

**Identification fields**

- ☒ Code barres
- ☒ Numéro
- ☒ Cote
- ☒ ISBN / EAN

Cancel OK

This page of the parameters lets you define which services you offer to the library users.

Libraries that do not wish to make their online catalog available to everyone, but only to their registered readers, may check the **Private Access** box: readers will have to identify themselves to access the online catalog. In this case, it is strongly recommended to check the **Mandatory Password** box to prevent any abuse of the connection.

Define with the **Period of validity of a session** the time before the reader's login and password are requested again. This can range from a few minutes to 365 days. 24 hours is a good compromise between security and convenience.



## 2.3 General tab

The screenshot shows a window titled 'Modification Parameters WebOPAC' with several tabs: 'Web server', 'Authorisations', 'General' (selected), 'LDAP', 'Security', 'E-mails', and 'Library info'. The 'General' tab contains the following settings:

- ☐ Orders can be seen
- ☐ Relation "And/Or" (subjects search form)
- ☐ Relation "And/Or" (subjects->titles)
- ☐ New readers may sign up
- ☐ Titles may be sent to readers' home
- ☐ Display the date of return
- ☐ Display the borrower name
- ☒ Display title cover picture
- ☐ Search the picture automatically on the internet

Simple Search and by Title / Keywords

- ☒ Broaden the search if no record found
- ☒ Implicit truncation

New acquisitions

Titles acquired since the  last days

Delay before titles are available  days

Administrator of the server

Name

E-mail address

E-mail sender

User

☐ Display showcase

Showcase title

- ☐ Display the last  new acquisitions
- ☐ Display titles with the 'In Showcase' value

☐ Activate Antolin

Buttons: Cancel, OK

**Orders can be seen** : current orders may be displayed in search results (this check box has a meaning only with the acquisitions module of BiblioMaker PRO)

**Relation "And/Or" (subjects)** : if this check box is ticked, a pop-up menu containing the And/Or boolean relationship is displayed in the search form by subject. This menu is only useful if you work with subjects composed of main subjects and secondary subjects (such as for instance "Great Britain : History : 20th Century").

**Dialog "And/Or" (subjects->titles)** : if this check box is ticked, radio buttons are displayed under the list of found subjects. These radio buttons let you combine several selected subjects for searching for corresponding titles.

**Display the borrower name** : displays the borrower name in the availability section of a lent title.

**Display the date of return** : displays the date of return in the availability section of a lent title.

**Display the thesaurus search** : if this check box is ticked, an additional link called **Display the list of subject categories** is displayed in the search form by subject (this check box is displayed only if you have the Thesaurus module).

**Display title cover picture** : A picture of the title cover is displayed. This picture comes from the COVER PICTURE field in the Titles file.

**Search the picture automatically on the internet** : if the title record does not contain the cover picture, the picture is searched on the web. But the search happens only if the title's ISBN has been saved in the title record.

**Simple Search and by Title / Keywords** : specify how the application should behave when searching.

**Administrator of the server** : enter the name and the e-mail address of the librarian the readers may contact. The name and the e-mail are displayed on the homepage.

**E-mail sender** : choose here an e-mail sender account. These accounts are defined with the **Configure sending e-mails** command in the **Other** menu of the Maintenance.

If you'd like to be informed by e-mail when a reader reserves a title, changes his post address or registers to the library, you must define this parameter.

**User** : choose here one of the BiblioMaker user accounts. These accounts are defined with the **Users** command in the **Maintenance** menu of the Maintenance.

The account you choose here is saved in changed Address or Loan records. You access the last modification's author with the **Info** button of the corresponding records. This can be useful if you need to understand who modified a record and when.

This is why we suggest that you create a user called for instance "WebOPAC server". If you uncheck the **Active** check box, this user account will not be displayed in the login dialog.

**New acquisitions** : define here the period of time for a new acquisition to be considered as such. This delay is used as a parameter when searching for new acquisitions in the WebOPAC and in the virtual showcase (read on).

**Display showcase** : if you tick this box, a virtual showcase is displayed on the online catalogue homepage. The showcase contains either new acquisitions, or titles you have selected. Please note that only titles with a cover picture are displayed in the showcase.

**Activate Antolin** : by ticking this box, you can link your catalogue with the german Antolin website. Antolin contains thousands of books for children.

## 2.4 LDAP tab (not available in the cloud version)

Add Parameters WebOPAC - Nr 1

Web server Authorisations General **LDAP** Security E-mails Library info

☒ Authentication with LDAP server Test

IP address	
TCP port number	389
LDAP server version	3
Query	sAMAccountName=<uid>,cn=users,dc=?,dc=ch

Cancel OK

**Authentication with a LDAP server** : if you tick this check box, BiblioMaker will communicate with a server using the Lightweight Directory Access Protocol. This kind of directory is used for managing users and authorisations in a centralised manner.

When a reader wants to query his/her account or reserve a title, he/she must give his/her identity (reader code) and a password. BiblioMaker transmits the code and the password to the LDAP server. The LDAP accepts or refuses the password. If the password is invalid, the reader must enter the password again.

If the password is valid, BiblioMaker saves it in the reader's record. So, if the LDAP is temporarily unavailable, BiblioMaker will use the saved password in order to authenticate the reader.

The parameters of the LDAP server are :

**IP address** : LDAP server's address (the 389 port number is implicit; if the LDAP server uses another port number, enter it after the colon sign following the IP address; example : 192.168.3.23:390).

**Query** : query syntax used to query the LDAP server. The query must contain the <uid> code that will be replaced by the reader's ID\* signing in the WebOPAC.

\*the reader's ID is either the LDAP IDENTIFIER field contents (if this field has been filled out) or the reader CODE field contents.

Syntax example : sAMAccountName=<uid>,cn=users,dc=?,dc=ch

## 2.5 Security tab (not available in the cloud version)

The screenshot shows a window titled 'Add Parameters WebOPAC - Nr 1' with several tabs: 'Web server', 'Authorisations', 'General', 'LDAP', 'Security' (selected), 'E-mails', and 'Library info'. The 'Security' tab contains the following fields and controls:

- ☐ Activate secure connections (https)
- Secure TCP port number: 8443
- Number of processes: 4
- Secure domain: (empty text box)
- Company: (empty text box)
- Department: (empty text box)
- Place: (empty text box)
- Canton: (empty text box)
- Country: CH
- Secure e-mail address: (empty text box)
- Certificate order: Generate button
- Private key: Enter... button
- Public key: Enter... button
- Certificate: Enter... button
- Certificate signed by: ... button with a dropdown arrow
- Validity: 00.00.0000
- Emitted: (empty text box)

At the bottom right, there are 'Cancel' and 'OK' buttons.

When a reader logs in in the web public search (in order to book a title or to query his account), he enters his reader code and password. When querying his account, the web server transmits personal information such as the list of lent titles, the private address etc.

These information can be encrypted using the SSL protocol (*Secure Socket Layer*). SSL needs a digital certificate authenticating the BiblioMaker web server. With the Security tab, you can generate a certificate order and register the certificate delivered by the authority you have chosen.

**Activate secure connections (https)** : tick this check box if you want to secure the connections in the web OPAC.

Notice : this box can be ticked only if all obligatory parameters in this tab have been defined.

**Secure TCP port number** : enter the TCP port number to use for secure connections. Usually, it is the port 443. But if the server Web OPAC runs under Mac OS X, only port numbers greater than 1024 can be used. We suggest that you choose the 8443 port number, but check first that this port is not already in use.

**4D port number** : enter the TCP port number for insecure connections. As this field has been created mainly for test purpose, it is safer to leave this field empty.

**Number of processes** : number of processes answering to queries. If you think that the web server will not receive more than several hundreds queries a day, you may define a value of 4 processes.

**Secure domain** : domain name encoded in the certificate. The Web OPAC server must belong to the domain name. If the server has a subdomain name, enter here the subdomain name followed by the domain name (for instance *opac.library.ch*). You can also enter an IP address, but some certification authorities (such as *QualitySSL*) demand a domain name.

With the  icon, you can query the [www.uwhois.com](http://www.uwhois.com) web site and display in a web browser the Whois information about the entered domain name.

**Company** : library or institution name having reserved the domain name.

**Department** : library/institution department.

**Place** : library/institution's place.

**Canton** : library/institution's canton.

**Country** : library/institution's country. Enter here a code of two characters, following the ISO-3166 standard ([http://www.iso.org/iso/country\\_codes.htm](http://www.iso.org/iso/country_codes.htm)). For instance, the country code for Switzerland is *CH*.


**Secure e-mail address** : e-mail address for the contact person registering the domain name. Caution, some certification authorities (such as *QualitySSL*) demand the e-mail address to contain the registered domain name.

**Certificate order** : after all fields have been filled up, click on the **Generate** button. The button's name turns to **Display**. Click on the **Display** button and copy the text that has been generated. This text must be pasted into the online form on the certification authority's web site.

**Private key** : a certificate contains a private key. This key is generated automatically with the certificate order. But you may also generate a key with another software. In this case, click on the **Enter...** button and paste the key.

**Public key** : a certificate contains a public key. This key is generated automatically with the certificate order. But you may also generate a key with another software. In this case, click on the **Enter...** button and paste the key.

**Certificate** : after you have received the certificate from the authority, copy it, click on the **Display** button and paste it. If a certificate has been registered, its creation date and time are displayed next to the **Display** button.

**Certificate signed by** : pop-up menu containing the main certification authorities. After you have selected the authority, click on the  icon in order to connect to its web site, on which you may send your certificate order.

**Validity** : enter the certificate validity date. Indeed, a certificate validity is limited in time. When starting the Web OPAC server in secure mode, BiblioMaker displays an alert when the validity date is nearly reached.

When the Web OPAC server starts up the secure connections for the first time, it creates two files on the disk : *key.pem* (containing the private key) and *cert.pem* (containing the certificate). These files are saved in the same folder as the BiblioMaker application (single-user or server version).

This means that the folder containing the application may not be read-only.

## 2.6 E-mails tab

The screenshot shows a web application window titled 'Add Parameters WebOPAC - Nr 1'. It has several tabs: 'Web server', 'Authorisations', 'General', 'LDAP', 'Security', 'E-mails' (which is selected), and 'Library info'. The 'E-mails' tab contains the following fields and options:

- Message:** A dropdown menu with 'Inscription of a new reader' selected.
- Subject:** A text field containing 'Inscription of a new reader'.
- Body:** A large text area containing the following text:

```
The following reader wants to apply to the library:

Title: BM_READER_TITLE
First name: BM_READER_FIRST_NAME
Surname: BM_READER_SURNAME
Address: BM_READER_ADDRESS
Post code: BM_READER_POST_CODE
Town: BM_READER_TOWN
Phone: BM_READER_TELEPHONE
Date of birth: BM_READER_BIRTH_DAY.BM_READER_BIRTH_MONTH.BM_READER_BIRTH_YEAR
E-mail: BM_READER_EMAIL
Remarks: BM_READER_REMARKS
```
- Do not send this message:** An unchecked checkbox.
- Buttons:** 'Cancel' and 'OK' buttons at the bottom right.

When a reader performs some operations in the online catalogue (for instance applies to the library, reserves a title or cancels a reservation), an e-mail can be sent to the librarians in order to inform them.

You can edit the e-mail title or message. If you tick the **Do not send this message** check box, no e-mail will be sent for the corresponding operation.

Notice : It is necessary to set up BiblioMaker in order to send e-mails by using the **Other>Configure sending e-mails** in the Maintenance. Once the e-mail settings have been defined, you can choose the e-mail account with the **E-mail sender** pop-up menu in the **Webserver** tab of the WebOPAC parameters.

## 2.7 Info picture tab

The screenshot shows a web browser window titled 'Add Parameters WebOPAC - Nr 1'. The 'Library info' tab is selected. The main area contains a large text box with a placeholder image of an orange circle with 'BM' in white. To the right of the image is the text: 'Nottingham Public Library', 'Fulton Road', 'Nottingham EC34 AR34', 'Phone 03 345 67 67', and a blue link 'info@nottinghamlibrary.co.uk'. Below this, it says 'Our Public Library has a collection ab about 8000 books and 500 DVDs.' and 'You can lend up to 5 books and 2 DVDs for 3 weeks.' At the bottom, there are two input fields: 'Online map's URL' with the value 'https://www.google.ch/maps/place/Nottingham/@46.22377,6.22245,15z/data=!4m2!3m1!1s0x478c6fa56c92e539:0x693a841' and 'Library phone number' with the value '00442895456325'. A 'Select...' button is in the top right. At the bottom right are 'Cancel' and 'OK' buttons.

Register in the last tab a picture giving information about the library. This picture is displayed in the web public search when a reader clicks on the **Information about the library** link on the homepage.

Insert the picture in this dialog either with the Copy and Paste function, or the **Select** button.

The **online map's URL** is a link to an online map that lets remote users using their mobile device locate the library. You fill up this field by visiting such an online map web site (for instance Google Maps), by displaying the library location, then by copying and pasting the map URL to this field.

The **library phone number** is displayed in the interface for mobile devices as a link or a button : by clicking on it, the remote user can directly call the library.

## 2.8 Starting / Stopping the WebOPAC server

You manually start or stop the WebOPAC server from the dialog box listing the server configurations : select the configuration, then click on the **Start / Stop** button.

With the multi-user version of BiblioMaker, if the WebOPAC server is hosted on the BiblioMaker server, you can start/stop the web server from any client computer. If the WebOPAC server is hosted on a client computer, only this computer can start/stop the web server.

If you modify some web server settings, these new settings will be taken into account only after a restart of the web server.

## 2.9 Setting up readers' accounts

If you'd like your readers to be able to query their account and to reserve titles, you must give them a password they will enter in the WebOPAC in order to authenticate.

Use the **Action>Apply>Password loans** command in the Addresses file in order to define a password. You can give password in three manners :

- **Apply a value** : the same password will be applied to all selected readers.  
Communicating the password to the readers is easy. But it is not very secure, as readers could quickly realise that their password is the same as their neighbours'...
- **Apply the reader code** : the system gives to each reader his code as password. When a reader connects to his account for the first time, the system demands that he changes his password. This method is more secure than the first one and communicating the password to the readers is quite simple.
- **Apply a random value** : the system gives any password to each reader. This method is the safest one, but you need to communicate the password in writing (letter or e-mail) with the **Password letter** available in the Print dialog of the Addresses file.

The screenshot shows a dialog box titled "Apply Addresses". It has two main sections. The first section, labeled "Target", contains a dropdown menu currently showing "Password loans". The second section, labeled "Substitute with", contains three radio button options: "the value:" (which is selected), "the reader code", and "a random value". Below the "the value:" option is a text input field. At the bottom of the dialog are two buttons: "Cancel" and "Apply".



### 3. Using the WebOPAC

The online catalogue can be browsed either from a computer or a tablet, or from a mobile device with a small screen (such as a smartphone). The user interface is optimized for each screen size, but on smartphones, there are less options than on a computer.

#### 3.1 Query the catalogue

Readers query the catalogue by connecting to the homepage using a web browser.

On the homepage, they can either enter some words in the «Easy search» field, or click on a link in order to do a specialised search (by keyword, author, subject, series, etc.). After they have filled up the form, they get a list of records corresponding to their criteria.

In the list of found titles, a click on a title displays the complete title record with its availability.

#### 3.2 Registration of a new reader

A link called **Sign up to the library** is displayed on the catalog's home page. When one clicks on this link, a registration form is displayed. After he has filled out the form, the reader clicks on the **Send** button.

The form is sent by e-mail to the librarian who decides to accept or refuse the registration. For security reasons, the address data file is not modified by the registration.

You can configure the registration form, in order to choose which fields must be displayed and which ones are obligatory. You need an HTML editor and some basic knowledge of the Javascript programming language. The registration form is a file called *Register.htm* located in the *OPAC\_Web/Template/[Language]/* folder.

Caution : do not edit the original file, but copy it and put the copy into the *OPAC\_Web/[Language]/* folder. Edit only the copy. The copy must sport the same name as the original file.

#### 3.3 Query an account

A link called **My account** is displayed on the catalog's home page. When one clicks on this link, a login dialog is displayed. The reader must enter his code and his password, then click on the **Sign in** button.

If the reader has forgotten his code or password, he can get it by e-mail using the e-mail address registered by the library.

After a successful login, the web public search displays the reader's post address and the list of current loans and reservations.

If the readers have the corresponding authorisation, they may change their post address (link **Edit address**), change their authentication password (link **Edit password**) and display their past loans (link **Display past loans**).

##### 3.3.1 Changing the post address

Changing the post address is done with a form containing the current address. The reader edits the fields and validates the changes with the **Send** button. The reader record is immediately updated in the database's Addresses file and an e-mail is sent to the librarian.

You can configure the form for updating the post address in order to choose which fields must be displayed and which ones may be edited. You need a HTML editor. The form is a file called *PageAddr.htm* located in the *OPAC\_Web/Template/[Language]/* folder.

Caution : do not edit the original file, but copy it and put the copy into the *OPAC\_Web/[Language]/* folder. Edit only the copy. The copy must sport the same name as the original file.

### 3.3.2 Changing the password

Changing the password is done with a form containing three fields : the field for entering the current password and two fields for entering the new password. The reader validates the change with the **Send** button. The reader record in the database's Addresses file is immediately updated and an e-mail send to the librarian.

You can configure with a HTML editor the form for updating the password. The form is a file called *ChangePassword.htm* located in the *OPAC\_Web/Template/[Language]/* folder.

Caution : do not edit the original file, but copy it and put the copy into the *OPAC\_Web/[Language]/* folder. Edit only the copy. The copy must sport the same name as the original file.

### 3.3.3 Displaying past loans

The past loans display a list of title lent by the reader, sorted chronologically.

You can configure the list format with an HTML editor. The list is a file called *ListStat.html* located in the *OPAC\_Web/Template/[Language]/* folder.

Caution : do not edit the original file, but copy it and put the copy into the *OPAC\_Web/[Language]/* folder. Edit only the copy. The copy must sport the same name as the original file.

### 3.3.4 Renewing loans or canceling reservations

If the corresponding authorisations have been given and if all conditions are met, the reader may renew a current loan or cancel a reservation. A check box **Renew/Cancel** is displayed next to each current loan/reservation.

When a reader renews a loan or cancels a reservation, the database's Loans file is immediately updated and an e-mail is sent to the librarian.

You can configure with a HTML editor the web page displaying the reader account. The page is a file called *ListLoan.htm* located in the *OPAC\_Web/Template/[Language]/* folder.

Caution : do not edit the original file, but copy it and put the copy into the *OPAC\_Web/[Language]/* folder. Edit only the copy. The copy must sport the same name as the original file.

## 3.4 Title reservation

A reader reserves a title from the online catalogue. In the detailed view of a title record, alongside the title's availability, a link called **Reserve this title** is displayed. This link opens a reservation page : the reader must enter his code and his password in order to reserve the title.

If the library's policy is to send titles to readers' home, two additional radio buttons are displayed in the reservation dialog box : **I will fetch the title at the library when available** and **Please send me the title when available**. The chosen option appears on the e-mail sent to the librarian.

A reservation creates a reservation record in the Loans file and an e-mail is sent to the librarian.

You can configure with a HTML editor the web page displaying the reader account. The page is a file called *ReserveTitle.htm* located in the *OPAC\_Web/Template/[Language]/* folder.

Caution : do not edit the original file, but copy it and put the copy into the *OPAC\_Web/[Language]/* folder. Edit only the copy. The copy must sport the same name as the original file.

## 4. Statistics about the WebOPAC

With BiblioMaker, you are able to get much many information about the use of the WebOPAC. Indeed, the system can register each query received and print statistics about them.

### 4.1 Setup of the WebOPAC

You setup the WebOPAC by calling the **Configure the web public search** in the **Other** menu of the Maintenance, either in the single-user of BiblioMaker or on a client computer with BiblioMaker Client.

Among the many options you will find in the Web server tab a check box called **Query log**. This box must be ticked if you want the program to register the queries.

### 4.2 Statistics on the use of the WebOPAC

Each query is automatically saved in a file called *Statistics WebOPAC*. You reach this file with the Statistics WebOPAC command in the **Data** menu.

A statistics record contains the following information :

- Date and time of the query
- Query type (easy search, search by title, by author, by class mark, by subject, by series or by several criteria)
- Search criteria entered by the reader
- Number of found records

With the **Find** command, search queries using the criterion of the date, time, number of found records or query type. If you only need to know how many queries have been received during a certain lapse of time, enter the dates in the **Find** dialog and start the query.

If you need more detailed statistics, several list and export formats are available:

#### 4.2.1 Print templates

##### List of search criteria

List containing the date and time of each query and the search criteria defined by the reader. This list is useful if you want to analyse the criteria and the syntax used by the reader. The list could show that some readers don't use the right syntax (for instance with the search by author, by typing the name before the surname). If necessary, train the readers.

Another example is to search for queries by subject that have led to zero found record. Print a list of these queries and compare the typed words with your own subjects directory. If you should notice that some words are often used by readers, but that they miss in your directory because you use a synonym, you could add this word to the directory and refer it to another subject record.

##### Number of queries by date

Print template containing the number of queries received during a certain lapse of time. Numbers are summed up by hour, day, week, month or year. You get a list and a chart.

### **Number of queries by type**

Print template containing the number of queries received, distributed by search type (easy search, by keyword, by author, by series, by class mark, by subject or by several criteria). You get a list and a chart.

#### **4.2.2 *Export templates***

##### **Simple**

This template exports into a text file each selected query with all details (date and time, query type, number of found records, search criteria). Open this text file with a spreadsheet program and use the search and sort functions in the spreadsheet in order to analyse the queries.

## 5. Customizing the WebOPAC's user interface

The WebOPAC is delivered in a fully functional way and can be started right after some basic parameters have been defined. But some libraries would like to customize the online catalogue, for instance in order to accomodate it to their main website or to change some objects (library's logo, explanation to the readers, etc.).

BiblioMaker WebOPAC's server uses templates saved in a folder called «OPAC\_Web» located in the folder containing BiblioMaker's single-user version. You can modify these templates if you need to.

One should not underestimate the difficulty of customizing the HTML pages. A HTML text editor is necessary as well as knowledge of the HTML codification, cascading stylesheet and the structure of the files installed on the server. In fact each page contains links to other pages as well as codes for the server. If one page is modified there is a risk that links may be broken or that needed codes are erased, which could lead to an unusable WebOPAC. In view of this, the customization of HTML pages should only be done by experienced persons who can devote several hours to the job.

This document does not explain in all details how to customize your online catalogue (please read the handbook for that), but it describes a minimal customization, such as displaying your own logo and the library's name and address in the header, the information about your library and it explains how to edit the stylesheet in order to change the frames colour.

### 5.1 Minimal customization

#### 5.1.1 Library's logo

By default, the online catalogue displays the BiblioMaker logo on the header. You can replace it with your own logo.

The logo must be saved in a GIF file named *Logo.gif*. This file must be placed on the computer used as the WebOPAC server, in the *OPAC\_Web/Common/* folder. Usually, the *OPAC\_Web* folder is found under :

Windows : *C:\Program files(x86)\BiblioMaker[version number]/*

Mac OS : *Macintosh HD:Applications:BiblioMaker:*

#### 5.1.2 Library's name and address

The library's name and address can be displayed in the header near the logo.

The name and address must be entered directly in the BiblioMaker database : call the **File>Maintenance**, then the **Maintenance>Configuration** commands. Fill out the **Library** and **Heading** fields.

#### 5.1.3 Information about the library

There are several ways to display information about the library. We will explain only the easiest one, so that the link called **Information about the library** on the home page displays this information.

In a word processor or graphics painting software program, write the information (opening time, number of books you have, etc.). You can naturally add some pictures.

After you have defined the layout for this information, grab a copy of the screen part containing the information. Under Windows, use the Snipping tool. Under Mac OS, press the Command-Control-Shift-4 keys.

In BiblioMaker, display the parameters of the WebOPAC server (command **File>Maintenance**, then **Other>Configure the web public search**, then change the existing configuration). In the **Info Picture** tab, paste the picture you have copied.

#### 5.1.4 Frames colour

The properties of frames and of other objects are saved in a stylesheet file called *Stylesheet.css* located inside the *OPAC\_Web/Template/Common/* folder. Usually, the *OPAC\_Web* folder is located under :

Windows : *C:\Program files(x86)/BiblioMaker[version number]/*

Mac OS : *Macintosh HD:Applications:BiblioMaker:*

Do not edit the original *Stylesheet.css* file, but copy it to the *OPAC\_Web/Common/* folder and edit the copy.

The stylesheet contains about 40 styles. The frames colour is defined in the following styles :

.ExplanationZoneBorderColor

.FindZoneBorderColor

.InfoZoneBorderColor

.MainZoneBorderColor

Replace the colour codes with the code of another colour. If you don't know the colour code, you will find on several websites utilities for converting a colour to its code.