

Customizing ALEPH: Modifying your ALEPH Web OPAC

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When I accepted the position of Information Technology and Instruction Librarian at SUNY Cortland in the spring of 2001, I was told that Cortland was to be in the second group of SUNY sites to migrate to ALEPH, the new SUNY library management system. My contributions and responsibilities to the migration team would involve the web OPAC that would be part of the new LMS. This fit well with my other job responsibilities as library webmaster. For my part, this news was met with both excitement and trepidation. While I enjoy challenges and trying new things, the job at Cortland was my first as a librarian and I had never been through a LMS migration before.

However, in the fall of 2001 I began preliminary planning concerning Cortland's new web OPAC. My first problem was that I had no idea what the ALEPH web OPAC would or could look like, how it was structured, and the pieces that made it work. At the time there were a limited number of libraries in the United States using ALEPH and many of the SUNY pilot sites had still not STP'd (switched to production). As a result, I began an extensive search for examples of the ALEPH web OPAC. I went to the ExLibris website to look at their list of customers. I searched the internet and I used word of mouth from SUNY staff involved in ALEPH (OLIS, and the pilot sites). When I found an ALEPH web OPAC I added it to the electronic list I was keeping.

Towards the spring of 2002, I began seriously testing the different web OPACs to see how they worked. I began printing out screens and putting them in a folder with notes. From this work several things became very clear. First, if I wanted to change the basic look and feel of the web OPAC I was going to have to use cascading style sheets. Second, the web OPAC was in frames. Third, the underlying ALEPH structure made the web OPAC work a challenge.

Choosing from the limitless possibilities

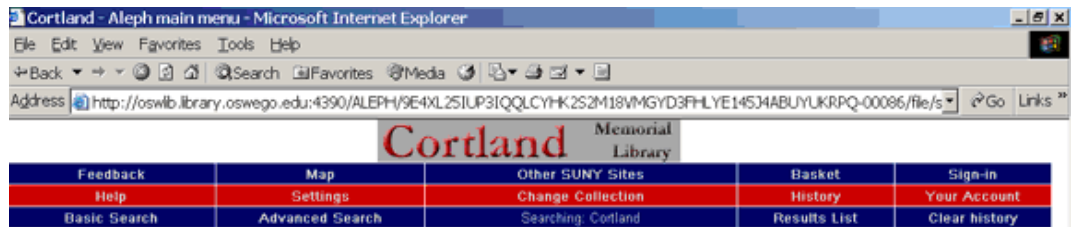
By the spring I needed to make some decisions about the basic structure of the Cortland web OPAC. It is safe to say that based on my initial survey that the possibilities for the web OPAC are nearly limitless. For example, MIT had chosen to re-arrange the frames and completely change the structure of many screens. However, I also realized that these kind of changes take time, skill, planning and resourcefulness. As a result, the first decision was that Cortland, like everyone else in Group2, would use the SUNY template as our starting point.

However, there were several potential changes which were discussed almost immediately. The first was purely a design issue. Our library wanted a customized Cortland "look" which matched [our website](#). The second change involved the basic search screen. In my initial exploration, MIT's basic search screen intrigued me because it had a single search box. Upon showing this design to the librarians it was decided that a single basic search box was more desirable than two search boxes. A third change involved instructions that SUNY Binghamton had placed on the brief list display screen to help users. Other changes involved re-arranging the brief record display, full record display and the availability screens.

Sign-in	Profile	Settings	Feedback	Help	ILL	Basket
ExLibris University						
Clear History	Searching: ExLibris U Complete		Change ALEPH Database		Other ALEPH Sites	
Basic Search	Advanced Searching		Results List		Previous Searches	

Based on what I had seen in my initial survey, I believed there were two keys to accomplish these changes efficiently. The first was to delve into the ALEPH web OPAC literature and

training and begin to make changes as soon as it seemed practical. The second was to utilize the code and experience of others as much as possible. I hoped that the institutions and people whose assistance I requested would be willing to help. Otherwise, I might not be able to complete the changes in the timeframe necessary.



Learning the language

In the spring I also attended web OPAC training with other staff members from the Group2 libraries. We received [in depth materials](#) about the web OPAC which allowed me to begin the customization process. The documentation provided by ExLibris is quite weighty. However, it is worth wading through because it is very detailed and in depth. One of the documents I found the most useful was the "List of WWW OPAC Files." This document details which files make up each of the web OPAC screens and is a good starting place if you want to determine what file you need to edit to make a particular change. If you want a more condensed version, go to http://facultyweb.cortland.edu/coombsk/sunyla_2003/webOPAC_files.asp This is a list that I created as I worked on the web OPAC. It describes both the files that make up each screen and what they do.

Customizing the web OPAC is a combination of editing HTML files and ALEPH configuration tables. The latter include instructions about what information to display on certain screens. For me the HTML changes were very easy to accomplish. This is one benefit of ALEPH - that simple but very beneficial changes can be achieved if you know the basics of HTML.

However, editing the "ALEPH tables" was more challenging. Establishing the display and arrangement of the information requires some knowledge of MARC fields and subfields. So, the first major milestone for me was when I got the bibliographic fields on the full display screen rearranged.

For those of you who are or will be attempting this I have two suggestions. First, get a copy of the [MARC Bibliographic Standards or bookmark a web-based version](#). Second, become friends with someone who has cataloging experience or better yet the cataloger at your library. I had the advantage of having done some cataloging. However, such knowledge fades if you don't use it every day. So I had to have a little review session with our Bibliographic Services Librarian.

While this may sound daunting, the distinct advantage of such a customizable system is that any information in the bibliographic, holdings, or item record can be displayed. If you think that it is important to display the local notes then you can display them.

Finding Assistance

Even with all the documentation and training, there were several things I needed further help with. For me, the best sources were people who were working with the ALEPH web OPAC already. As a result, I spent time emailing and talking with both Laura Murray (OLIS) and Natalie Sturr (SUNY Oswego). This opportunity of having someone to discuss all of this with is very rewarding and positive for me. Additionally, Andy Perry and Sandy Card (Binghamton) were able to provide some new insights when I visited them shortly before our STP date.

However, in order to accomplish the single basic search box effect, I needed help outside of SUNY. As a result, I contacted MIT. I hoped that they would be able to explain to me how to alter the code to make this work or better yet provide me with their code. I was extremely fortunate to have MIT provide me with a copy of their basic search page. I replaced what we

had with this new code and "voila!" a single search box. In addition, my contact at MIT expressed interest in providing additional help if necessary and a keen interest in discussing web OPAC issues. For me this was a huge accomplishment, because when I emailed MIT, I didn't expect to receive a response back. It was extremely gratifying to know that ALEPH sites were willing to offer assistance and code to one another. Personally, I find this an advantage to the SUNY*Connect* LMS. Large institutions like MIT, University of Iowa, Harvard, and the California library system have done a lot of work developing their web OPACs. This collective experience is a great resource to draw upon.

Additionally, as more SUNY campuses move to ALEPH, the overall expertise within SUNY grows. The SUNYLMS email list provides a great forum for people to ask questions and it seems that there is now a critical mass of ALEPH users to allow for some good problem solving. As a result, all the SUNYs can benefit from each others experience.

An Overview of the Process

SUNY Cortland followed a relatively simple model for developing its web OPAC. As previously discussed the first step was for us to investigate existing ALEPH web OPACs in order to determine the features that we wanted to incorporate into our design. The second step in our development process was to build a preliminary version of our web OPAC beginning with the SUNY template and incorporating the desired features. The third step was to have library staff test this first version and to provide feedback. Based on the feedback, alterations were made and the staff was asked to provide feedback again. This process went through several iterations until we reached the STP version of our web OPAC.

Some of the features and components of ALEPH that we took advantage of are cascading stylesheets, virtual bases, the ability to both customize and/or re-use different screens, and the ability to customize the bibliographic data which is displayed. Cascading style sheets (CSS) are a distinct advantage of the web OPAC. Through CSS the font-family, color, background color and many other display settings can be controlled for the whole web OPAC. Much of the customization of the color scheme was done via CSS rather than altering the many individual pages that make up the web OPAC.

Virtual bases were another distinct feature of the ALEPH web OPAC. Creating several "bases" allowed the library to subdivide our collection into specific groups or sub-collections, which can be individually searched. The most important sub-collection we have is the Teaching Materials Center. The Teaching Materials Center (TMC) is a collection of teaching materials typical of those used in K-12 classrooms. Students majoring in education typically want to limit a search to the TMC. In the past, there was no easy way to do this. With the ALEPH web OPAC this is now possible.

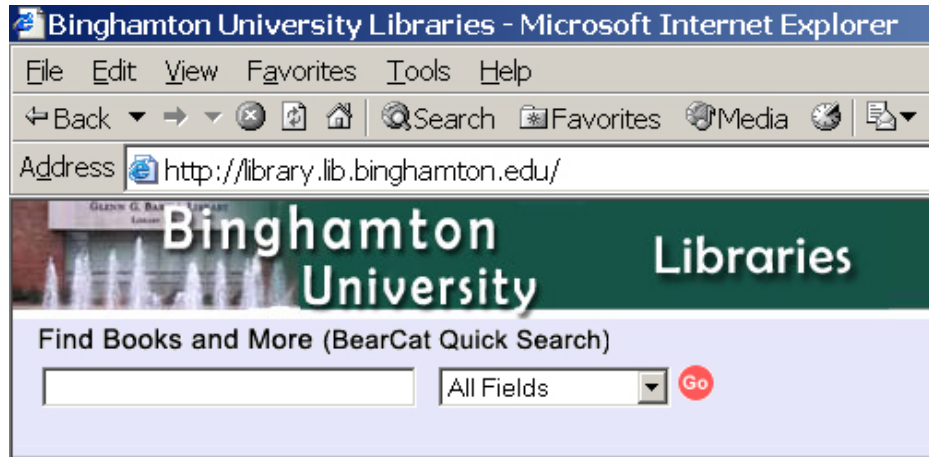


In addition, you can modify the basic and advanced search screens to customize them for your individual bases. We have chosen to do this with our Advanced Search Screen. However, screens can be reused from one base to another as well. This is a distinct advantage for screens which are the same in the both the 01 (bibliographic) library and the 30 library which controls reserves.

Another advantage of the ALEPH web OPAC is that you can customize the information which displays from the bibliographic, item and holdings records. The brief display list (of title information, etc.) can be both re-arranged and modified. The same is true of the full display and the availability screen. This is a distinct advantage for libraries which vary as much as those in SUNY.

Where we are now

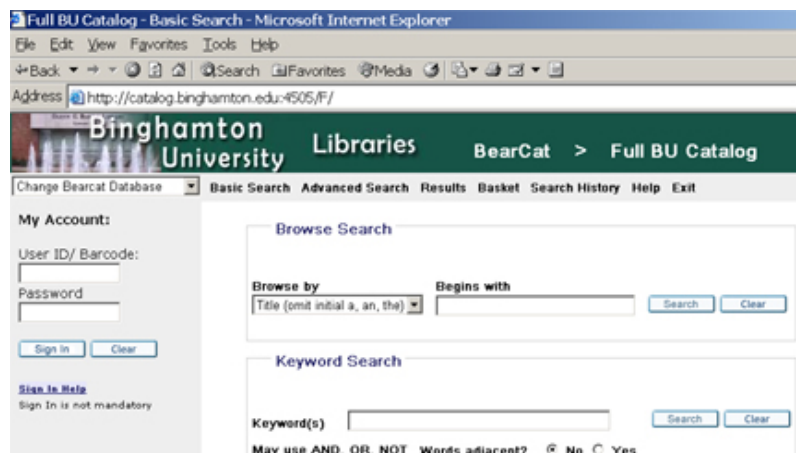
I want to point out that the STP version of our web OPAC is not our current version. We have made additional changes based on an iterative model. Some of these are fixes to problems that we keep finding. There are many screens and "cases" in the frames version of the web OPAC. As a result, even the most thorough testing might not show all the screens. Plan to spend some of your time following up on little bugs. You may think of this as annoying. However, I prefer to think of it as an opportunity to re-visit the validity of the original design decisions and to make enhancements to that design.



For me, enhancing some part of the web OPAC is the fun part of this process. There is always something new to try and I keep finding aspects of the web OPAC that I haven't explored yet. Since our STP date we have made many small upgrades to our web OPAC.

Additionally we have discovered the deep linking feature of ALEPH. Deep linking allows you to construct a URL that can generate a search in ALEPH. The user is taken to a single record or a set of records. The library systems staff at Binghamton showed me this feature which is utilized on their library's web site. Binghamton generously shared the code with me and I translated it into a form useable for Cortland and Morrisville's use. This is another excellent example of ALEPH collaborations that have borne fruit for multiple SUNYs.

The future for Cortland includes a move to a [frameless web OPAC](#) (available with the ALEPH500 v14.2 patch 7 software). I have been told the frameless version has many fewer files and is compliant with accessibility standards. This will be a major step forward. I also am investigating the potential use of XML within the ALEPH environment.



Lessons Learned

Over the last two years, working with the ALEPH web OPAC has been a very positive and collaborative process from which I have benefited a great deal. My experiences in particular have allowed me to meet and collaborate with colleagues in SUNY who I might not have met if not for my web OPAC work.

A crucial part of the ALEPH information sharing network has been people's willingness to both ask and answer questions and to share their knowledge and experience. I am learning new things all the time. For instance, the non-SUNY ALEPH institutions are great resources in this regard. In addition, to MIT, University of Iowa has also provided solutions to several of our problems, particularly dealing with electronic reserves. This illustrates the importance of using as many resources as possible to solve your problem. The [NAAUG list \(ALEPH-NA\)](#) and [conference](#) provide opportunities to communicate with other non-SUNYs about ALEPH. Additionally, it has been my experience that other inquiries via email or phone are well received.

This help is also available now from a growing list of SUNY campuses. For example, this year at SUNYLA, Connie Holberg of Jefferson Community College showed me how to make the title field a link on the brief display screen. This was a "problem" that our library had been struggling with since early in the process. To get a solution was extremely gratifying to us. In turn, I passed the solution to Andy Perry at SUNY Binghamton, where it is currently being used in their web OPAC. This is one of the greatest advantages of a single LMS for SUNY. A solution for Jefferson Community College can be a solution for Binghamton. Each institution can focus on its own strengths and share those strengths with the rest of SUNY.

Another lesson I have learned over the last two years is to keep exploring, innovating and improving the web OPAC. Users expect and want more from both the library website and web OPAC. It is up to us to provide them with the best experience possible.



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