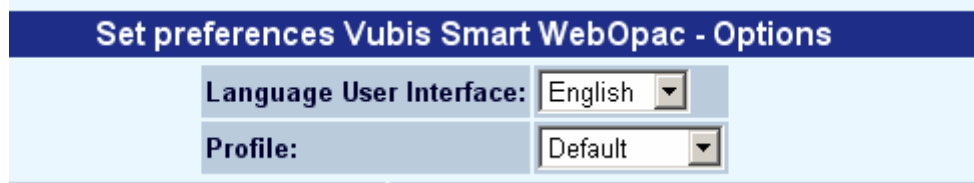# Webopac Preferences – Profile Options

1. Introduction

You can define options for each profile and for each language.

- Select the language for the profile from the drop-down menu

- Select the profile for which you want to make the changes


Languages are defined on the Start page.

This section (except "General") is based on the information made available in the **All Profiles** section, different options will be made available in this section. The different sections available for customisation are:

- Defaults

- Databases (Bibliographic & Authority)

- Boolean Operators

- Restrictions (language, acquisition timeframes, locations, material types)

- Indexes
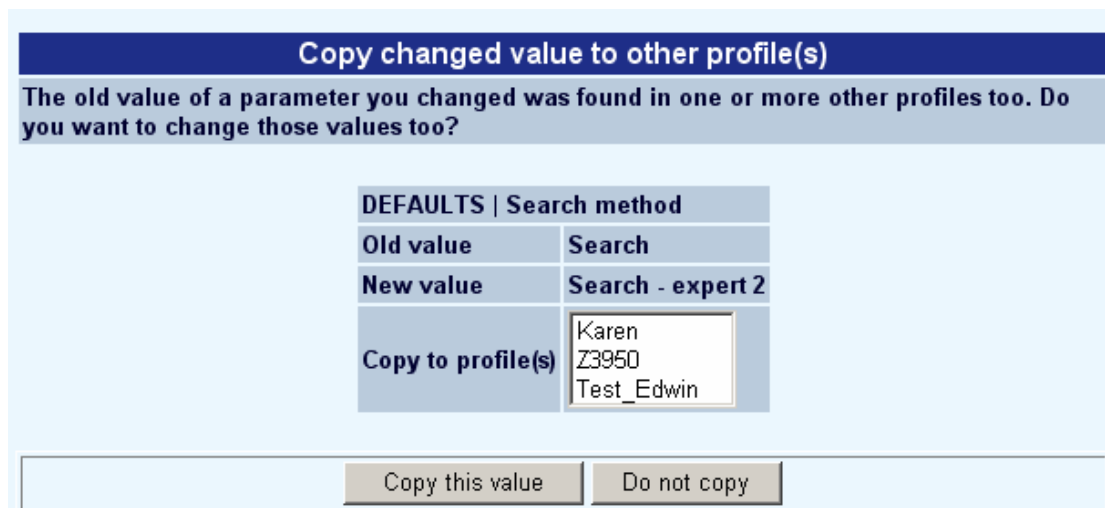
- Search Options

- Export options

- E-mail options

- SDI Profile setup

Note

Always remember to click the **Save changes** button to save any changes you have made.
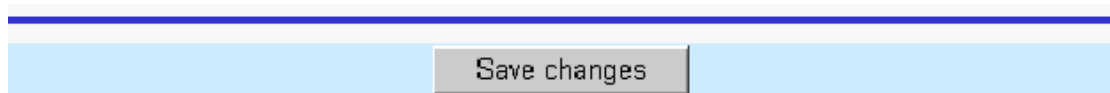
When you change the wording of any of the texts, and save the changes, the following window is displayed:

- Select **Copy this value** to apply the changes to one or more profiles

- Select **Do not copy** if you do not want the changes to apply to another profile.

2. General

The first portion of the options available is the ability to associate StyleSheets with each profile. A different StyleSheet can be associated for Netscape and IE browsers:

Stylesheet Netscape	vubisnn.css
Stylesheet Internet Explorer	vubisie.css

The next section has information about some basic display options:

Image (round corner) tab left	images/hoekl.gif
Image (round corner) tab right	images/hoekr.gif
Printer icon	images/print.gif
Show printer icon	Yes

- Image (round corner) tab left/right:

    - The file location of the image to be used on the tabs.

- Printer icon:

    - The file location of the image to be used for the printer.

- Show printer icon:

    - If set to Yes, the printer icon will show on the right above the record list display.

	🖶 Page 1 / 3 (
Title	**Author**	**Edition** Av
☐ Beyond the Farthest StarBook	F.M. Revell Roger Smith	2002

3. Defaults

Select the default language and the default search tab users of this profile will see when they first gain access to the system:

DEFAULTS	
Language Interface:	English
Search method:	Search

- Use the drop-down menus to select the user language and search method.

Select from this area which items to be made available for the current profile from the overall list:

- Select an item from the list on the left-hand side of the screen and click the ➡ icon to move it to the accessible list on the right-hand side.

- In order to change the order of the information, highlight an item in the right-hand side list and click the ⬆ icon to move it up in the list or the ⬇ icon to move it down in the list.

- To move an item out of the accessible options, highlight the item in the right-hand side list and click the ⬅ icon. The item will move back into the left-hand side list and will not be displayed for the current profile.

4. Restrictions

Select what languages can be used to restrict a search. And select what time since acquisition will be made available for the user to select when restricting a search.

Note

The wording for the acquisitions restriction is defined in **All Profiles** – **Options and texts**.

- Select an item from the list on the left-hand side of the screen and click the ➡ icon to move it to the accessible list on the right-hand side.

- In order to change the order of the information, highlight an item in the right-hand side list and click the ⬆ icon to move it up in the list or the ⬇ icon to move it down in the list.

- To move an item out of the accessible options, highlight the item in the right-hand side list and click the ⬅ icon. The item will move back into the left-hand side list and will not be displayed for the current profile.

5. Locations, Material types, Indexes

This section of the preferences screen allows the site to choose the available locations, material types and indexes that will be displayed in the current profile:

DATABASE FOR LOCATIONS, MATERIAL TYPES and INDEXES	Library Database

Locations for restrictions (Library Database)

Available options		Chosen options	
ANGIER LIBRARY	← →	ANDERSON CREEK ANDERSON CREEK PUBLIC CHILDREN ERWIN LIBRARY	↑ ↓

Sublocations for restrictions (Library Database)

Available options		Chosen options	
	← →	Reference Collection	↑ ↓

Material types for restrictions (Library Database)

Available options		Chosen options	
Adult Audio-Visual	← →	Regular (21 Days) Weekly (7 Days) Art Print (60 Days) Internet PC	↑ ↓

Available Indexes (Library Database)

		For current User interface language only ☐	
Available options		Chosen options	
Photographs ISSN Titles Series title	← →	Title keywords Author keywords Keywords Subject keywords	↑ ↓

- Select an item from the list on the left-hand side of the screen and click the ➔ icon to move it to the accessible list on the right-hand side.

- In order to change the order of the information, highlight an item in the right-hand side list and click the ↑ icon to move it up in the list or the ↓ icon to move it down in the list.

- To move an item out of the accessible options, highlight the item in the right-hand side list and click the ← icon. The item will move back into the left-hand side list and will not be displayed for the current profile.

For the available indexes you can also specify whether or not these are available only for the current user interface.

Note

If you use sublocations (and a table is set up via AFO 613 – Sub-locations) you can set up restrictions for this in the same way as described above.

Other options

This section allows the site to define various defaults for the current profile:

- Choose the appropriate default index from the drop-down list.

- Specify whether or not authority items with zero records must be shown or not.

This parameter applies to the pop-up screen that is shown when you offer a search option on a field that is controlled by an authority list (e.g. Material Type). It determines whether or not the user will also see codes to which no bibliographic record is linked. Depending on the number of authority lists you have defined, you will see one or more indexes to set the parameter for.

6. Weights

This section allows the site to specify what the weight of various searches will produce when finding related words:

For example, in the above screen snap-shot, the subject keywords index will weight a single match in a record with a value of 1. However, for every other occurrence of the word in the record, the weight will multiply by 5. This means that a subject search for Fish would weight a record with only 1 match a 1, but a record with 3 matches as 25 (1 x 5 x 5). This section is not necessary and by default all matches are weighted evenly.

The option "Display related works button" can be checked to suppress or display the related works button for a database on a per profile basis

Note

Related works only works with the Smart database and does not work with MARC/21.

7. Other options

7.1 Miscellaneous options

The next section contains a few miscellaneous setup options.

Ignore WebOpac visibility setting:	Yes ▼

Bibliographic records can be marked for Visible in WebOpac or not. There is a separate restriction index on WebOpac visibility. This flag works as a search restriction that is selectable in the staff module, but automatic in the WebOpac. In the WebOpac the use of the restriction is configurable by search profile. That way public profiles can skip records that are not meant to be visible, while staff profiles can still include those records in the search results.

If this option is set to Yes, it means you will see all records regardless of whether or not they are flagged as "invisible"

Max. difference in position of two words to be NEAR:	3 ▼
Mask sign stands for:	1 character ▼
With Browse right truncate automatic, also in case of left or middle truncate:	Yes ▼
What to show in case of no result:	Alternatives ▼
One result: next level:	Yes ▼
Search on Internet :	Yes ▼
URL for searching the Internet	http://www.altavista.com/cgi-bin/quer

- Max. difference in position of two words to be NEAR:

    - The NEAR Boolean term can be set to mean whatever the site deems reasonable per profile. In the above example, if two words are 1, 2 or 3 characters apart, they are to be considered NEAR.

- Mask sign stands for:

    - The mask sign can stand for either 1 or 0 characters or 1 character.

- With Browse right truncate automatic, also in case of left or middle truncate:

    - Right truncation is automatic when browsing – this will set both left and middle truncations automatic as well.

- What to show in case of no result:

    - This allows either alternatives or an error message to be displayed if the word entered from a search results in no matches. Alternatives will only be displayed based on information and data in the actual database.

- One result: next level:

    - If the search only finds one result, you can choose to display the full record immediately.

- Search on Internet:

    - Allow the user to search on the internet from the full record based on their search criteria

- URL for searching the internet:

    - If searching on the internet is allowed, input the string to place in front of the search term to automatically perform the search.

7.2 Miscellaneous options start screen

The below options allow the site to configure some options particular to the start screen for the current profile:

OTHER OPTIONS START SCREEN	
Choice of interface language:	Flags above buttons ▾
Choice of max. items per list:	Yes ▾ **Default value** 50 ▾
Choice of profile:	Yes ▾
Open VubisWeb in new browser window:	No ▾

- Choice of interface language:

    - This allows for either flags, drop-down box or no language choice as well as the positioning of the flags.

- Choice of max. items per list:

- Users can have the option of choosing how many items to return in the brief display. Set whether this option is activated and what the default value is.

- Choice of profile:

  - Even if a user is presented with a profile based on either the URL chosen or the IP address, it is possible to allow users to choose their own profile to use.

- Open Vubis Smart WebOpac in new browser window:

  - Set whether or not Vubis Smart WebOpac will open in a new browser window when a user logs in.

Note

Mozilla based browsers (i.e. FireFox) may retain sensitive borrower information in its history after Logout from User Activities when the WebOpac profile is set as a non-public workstation and does not open a new browser window. It is highly recommended that all profiles which allow public access to workstations be set to force the logout from User Activities to reset the session. The last option above should be set to YES in order to clear personal information for any profile where shared access is required.

8. Data export

If the user is allowed to export saved data this specifies where that data is exported to.

EXPORT OF DATA BY END USER	
Available templates for export	
Available options	Chosen options
	Meta template for export With Covers Meta template 2 with ISBD smart
Offer option to export via FTP:	Yes
Directory for temporary storage on database server (incl. end slash, e.g.: "c:\tmp\")	d:\databases\wubisdata\temp\
URL of FTP site	
Upload FTP files to remote server:	No
FTP server for upload	
User on upload FTP server	
Password for user on FTP server	
Directory on FTP server	

- Available templates for export

- Once you have created templates to be used for export, you can determine here whether or not they are available for this profile

- Offer option to export via FTP

  - Specify whether or not FTP is allowed for export.

- Directory for temporary storage on database server:

  - Where should files be kept temporarily for storage on the database server.

- URL of FTP site:

  - What the URL of the ftp site is.

- Upload FTP files to remote server:

  - Allow the user to ftp files

- FTP server for upload:

  - The server information for uploading of files

- User on upload FTP server:

  - User ID for FTP server

- Password for user on FTP server:

  - Password for FTP server

- Directory on FTP server:

  - What is the directory for the files on the FTP server

Additionally you can define various help and message texts:

↩	Append entries
↩	Cancel
↩	Clear existing entries
↩	\<center>Close window\</center>
↩	\<center>Export save list\</center>
↩	\<center>Select elements for export\</center>
↩	Saved items UBVU Catalogue
↩	Select the elements you need
↩	Export savelist :
↩	items selected
↩	This savelist already has entries. Would you like to remove them before adding your SDI
↩	*** Create new savelist ***:
↩	\<!-- Sign between label and data --\>\<i>Reference Manager\</i> users can enter the nece:
↩	\<font size="2">Other character

Texts and messages

9. Email

This section allows setup of email communication for marked records:

EMAIL COMMUNICATION	
Sender of email messages from Vubis system	d.alexander@geac.com
Address for emails (feedback) from end users	d.alexander@geac.com
Address mail server	mailhost.geac.com

Fill in the text boxes as appropriate.

Note

Ensure both email addresses are valid.

10. SDI Profiles

Setup the management and configuration of the SDI profiles that can be created by borrowers:

SDI AND PROFILES	
Maximum number of profiles per user	3 ▾
Maximum number of queries per user	100 ▾
Default number of publications before email notification	5 ▾
Default number of days before email notification	30 ▾
Default number of days for testing query	120 ▾
SDI results may be converted to a general savelist (**STAFF ONLY)	☐

- Maximum number of profiles per user

    - This is the maximum number of SDI profiles each borrower is allowed.

- Maximum number of queries per user

    - This is the maximum number of SDI queries allowed for each profile.

- Default number of publications before email notification

    - This can be overridden by the user.

- Default number of days before email notification

    - This can be overridden by the user.

- Default number of days for testing query

    - This is the default period that appears for the test query option in the SDI configuration pages of the WebOpac. The borrower can select another period when testing their queries.

- SDI results may be converted to a general savelist (**STAFF ONLY)

    - Check this box if staff are allowed to create a savelist based on SDI.

Note

The system can "convert" the data in an SDI result list to a "general savelist". This will add the SDI results to a general savelist, which can then be used in a search tree. You can select

from a list of existing general savelists, or create a new one. If you create a new savelist, you will need to give it a name in the box provided. If a name is not supplied, you will receive an error message and will be prompted to enter a name.

11. Bread crumb

With this option you can specify whether or not the search path must be shown at the top of the screen as well as the wording of the search path elements.

BREAD CRUMB	
Show path to this page (Bread crumb):	Yes
URL to start page (option):	
Text for URL to start page:	Start search
Text for URL list index terms level 1:	Terms level 1
Text for URL list index terms level 2:	Terms level 2
Text for URL record list:	Record list
Text for URL full description:	Full Descr.
Style class for bread crumb:	

These settings would look like this on the display of a full bibliographic record:

Search -> Terms level 1 -> Terms level 2 -> Record list -> FullDescr

12. Thesaurus links

The system has the ability to display, for every authority type, a small icon after the authority wording. This is available on both the result lists and the full record displays.

A click on the link icon will lead to the display of the full authority record.

The following parameters will be implemented:

- include authority reference on result list pages for authority types

- include authority reference on full record display pages for authority types

- icon to display for authority links

THESAURUS LINKS	
Authority database: Authors	
Show link on index term	No
Show link on record screen	No
Text popup message	
Link text	

Note

This option is only available when the thesaurus module has been implemented. Please contact Infor for more information.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	July 2008	Creation	
1.1	August 2008	new option for WebOpac visibility	