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# OpenBiblio System Administration

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Thanks for being an OpenBiblio system administrator. We're glad that you are helping your library in this way.

## 1. Managing your libraries

OpenBiblio 1.0 introduced the ability to manage multiple libraries with a single OpenBiblio installation. Each library is considered a separate "site," with its own name, collection, address, hours, closed dates, and other settings.

### 1.1. Adding a site

1. Go to Admin → Sites.
2. Click "Add New".
3. Fill out the relevant information. Choose the calendar that includes the dates your new library will be closed. See below for more information about the calendars.

#### **Warning**

If you do not choose a calendar, the new site will not be able to calculate due dates properly and you will not be able to check out any copies at this site.

4. Click "Add."

## 1.2. Deleting a site

1. Ensure that there are no copies at the site that you'd like to delete.
2. Sign in as a different site.
3. Go to Admin → Sites.
4. Delete the site.

### Note

OpenBiblio does not allow you to delete the site that you are currently signed in as.

### Note

OpenBiblio checks to make sure that there are no copies attached to the site you wish to delete. If there are still copies attached, you will have to delete them or move them to a different site before you can delete the site.

## 1.3. Library-specific settings

If you'd like the staff view of OpenBiblio to include your library's hours and phone number, go to Admin → Library Settings → Library. Check the "Show Library Info on Staff Pages" box.

## 2. Managing your users

To add a new staff member, go to Admin → Staff Admin. Click on the "Add New" button, found both at the top and bottom of this screen. You can then assign a username, password, name, and permission set to your staff member.

### Tip

The maximum length for usernames is 20 characters. The maximum length for passwords is 32 characters.

### Warning

You must assign at least one permission, or the staff member will not be able to log in.

## 2.1. Working with passwords

Openbiblio's password management system is very straightforward. Users with Admin permission are able to change their own password or the password of any other staff account (including other administrators). Users without the Admin permission may not change anybody's password, not even their own.

To change the password of a staff account, go to Admin → Staff Admin. Click the pwd button next to the account you are working with. Enter the new password. The maximum length for passwords is 32 characters.

## 2.2. Deleting users

Anybody with the admin permission may delete a user.

1. Go to Admin → Staff Admin.
2. Click the edit button next to the account you are working with.
3. Verify that you are deleting the correct user.
4. Click the delete button.

### Warning

You may delete your account if you have the admin permission. Please be very careful when deleting staff members, particularly your own account.

## 3. Managing your catalog

This section describes settings in the Admin menu related to cataloging.

### 3.1. Managing media types

You can access media types in Admin → Media Types.

There are several settings you can choose for any Media Type in your catalog, which are listed below.

- *Description* - a human-readable name for what type of material you are describing.
- *Checkout Limit* - the maximum number of this type of item a member may check out.
- *Default* - If this is set to *Y*, the cataloging module will default to the current media type.

### Note

You should be careful to only set one media type to be default, or else the cataloging module will run into errors

- *Search display lines* - This setting governs how long search results views will be. If you choose 5, for example, the search results page will display the first 5 MARC fields for items of this media type (based on the order you define in the Admin → Biblio fields interface).
- *Image file* - You may upload your own icon image for this media type here.

### 3.2. Managing collections

You can access media types in Admin → Collections.

There are several settings you can choose for any Collection in your catalog, which are listed below.

- *Description* - a human-readable name for your collection, such as "Fiction," "Children's books," or "Genealogy Room." We recommend that each collection correspond to a physical area in your library.
- *Item count* - this field is calculated automatically by OpenBiblio based on how many items exist in this collection.
- *Collection type* - this field allows you to decide whether items in this collection should circulate or be distributed.
- *Default* - If this is set to *Y*, the cataloging module will default to the current collection.

### Note

You should be careful to only set one collection to be default, or else the cataloging module will run into errors.

## Circulating collections

Circulating collections have a number of other settings, usually associated with a specific *due date calculator*.

- *Due date calculator* is a specific procedure to determine when items in your collection should be due back to the library.
  - *simple*: this due date calculator will simply add the requested number of days and minutes to the current date and time. If the library's calendar indicates that the library will be closed on that day, it will extend the due date to 11:59 p.m. on the next available open day.
  - *at midnight*: this calculator works very similarly to the *simple* calculator, except that it *always* extends due dates to 11:59 p.m. This calculator functions very similarly to the circulation module in OpenBiblio 0.7.x, and is the best choice for collections that you'd like to circulate for a certain number of days.
  - *before we close*: this calculator is for items that should return to the library at closing time. Items will be due after the specified number of minutes or at closing time, whichever comes first. If you specify the Pre-closing padding, items will be due the specified number of minutes before the library closes, so that members don't try to return the items as you are trying to close the library.
  - *ask me*: anytime an item in this collection circulates, the staff member will manually select the due date and time. This can be useful for interlibrary loan collections, where due dates are rarely standardized.
- *Days due back* - the length of the loan period in days for items from this collection.
- *Minutes due back* - the length of the loan period in minutes for items from this collection. You may combine this with the *days due back* field, if you would like (e.g. items can be checked out for 3 days and 45 minutes).

- *Daily late fee* - The overdue fee for each day an item is held overdue.
- *Important date* - a specific date that OpenBiblio should take into account when calculating a due date and time. This might be the end of a term at school.
- *Important date purpose* - what OpenBiblio should do with the important date.
  - *ceiling date* - OpenBiblio will not calculate any dates that fall after the important date.
  - *specific date* - OpenBiblio will always use the important date as the due date.

### 3.3. Managing displayed fields

Each type of media displays certain MARC fields, and can be labeled in specific ways. For example, the field 300\$a contains page numbers for book records and number of discs for DVDs. Therefore, you might want to label these in different ways to create the clearest experience for your members and staff.

#### Adding and re-arranging displayed fields

1. Go to Admin → Media Types. Make sure that you have the appropriate media types listed.
2. Go to Admin → Biblio fields.
3. Choose the media type you are interested in.
4. Click "Add to / Modify Layout".
5. To add new fields, use the dropdown menus in the right column to choose the field that you would like. You may include the same field multiple times if you wish.
6. To re-arrange fields, drag and drop the entries in the right column until you are satisfied.
7. When everything looks good, click "Save Layout".

#### Removing and renaming displayed fields

1. Go to Admin → Biblio fields.
2. Choose the media type you are interested in.
3. Click the "Edit" button next to the field you wish to remove or rename.
4. Here you can change the "label" that displays to members and staff, as well as data standards for this field.

### 3.4. Managing custom fields for copies

OpenBiblio offers some great flexibility for describing your physical items. In fact, you can add any field you'd like by going to Admin → Biblio Copy Fields.

Any fields you enter here will be displayed to your staff members as optional fields.

## 3.5. Managing copy catalog options

OpenBiblio's lookup feature saves catalogers a lot of time and hassle by importing pre-existing biblio records from other libraries using the SRU or z39.50 protocols.

You must complete these configurations before using the lookup features.

### Basic configuration

To access these options, go to Admin → Online Options.

1. *Online protocol*: If you have installed yaz correctly, we recommend that you select YAZ from this menu. This will use the z39.50 protocol, which is more widely used than the SRU protocol.
2. *Maximum hits*: the number of hits to display to catalogers.
3. *Timeout*: the amount of time OpenBiblio should wait for a response from the lookup host.
4. *Keep dashes*: This setting determines whether or not you would like to keep hyphen characters in ISBNs that your catalogers enter. We recommend that you set this to false, because most z39.50 and SRU servers index ISBNs without hyphens.
5. *Call number type*: the call number scheme that you'd like to use. OpenBiblio will then attempt to retrieve a call number of that type from the remote server to add to a 099 field.
6. Not sure what Auto Dewey does
7. *Default Dewey* provides a default call number for items you catalog using the Dewey Decimal Classification, in case the remote server does not provide useful Dewey Call Number information.
8. *Auto Cutter* will automatically generate a Cutter number for you.
9. *Cutter Type* asks you to choose between LoC cutters and Cutter-Sanborn cutters.
10. *Noise words* are common words that you would like to remove from your queries to get better results.
11. *Auto collection* will automatically put new copies in your default collection.
12. *Fiction name* will be the initial part of any call number for fiction books, which typically do not use formal call numbers.

### Server-by-server configuration

You will also need to configure each remote server in Admin → Online Hosts.

## 4. Configuring the OPAC

This section will describe settings found in the admin menu.

## 5. Managing locales

OpenBiblio can be translated into any language that you wish!

### 5.1. Character set

You can use any character set that you find by running the MySQL command `SHOW CHARACTER SET` [<https://dev.mysql.com/doc/refman/5.7/en/charset-charsets.html>]. Do this by going to Admin → Locale and entering your preferred character set. If you enter an invalid charset or leave this field blank, it will default to the *utf8* character set.

#### Note

The character set you specify will appear in the `<meta charset>` attribute and apply to any database calls.

### 5.2. Creating a new locale

This requires access to the files and a good UTF-8 text editor.

#### Create a directory for your new locale

1. Create a new directory in the locale directory with the 2-character ISO 639-1 code for the language. For example, if you would like to do an Amharic translation, your directory would be called `am`.

#### Note

OpenBiblio traditionally uses the 2-character ISO 639-1 code, but you may also use a 3-character scheme or custom string if your language isn't represented in ISO 639-1.

2. Create a PHP file called `metadata.php`. Make sure that the class name begins with the ISO 639-1 code for your language.

```
<?php
class amMetaData {
    public function __construct() {
        $this->locale_description = "Amharic";
    }
    function pluralForm($n) {
        if ($n == 1 or $n == -1) {
            return 'singular';
        } else {
            return 'plural';
        }
    }
    function moneyFormat($amount) {
        if ($amount < 0) {
            return sprintf("(-%.br)", abs($amount));
        } else {
            return sprintf("%.br", $amount);
        }
    }
}
```

}

3. Add translations to trans.php.

## 6. Managing the MySQL database

This section will describe the database

## 7. Managing the server

This section will discuss other server-level considerations.

### 7.1. Logs

This section will mention logs of particular interest to OpenBiblio administrators.

### 7.2. Not yet implemented features

#### OPAC URL

In Admin → Library Settings → Miscellaneous, you can set the OPAC URL. However, this is currently not used anywhere in OpenBiblio.

#### Requests

In Admin → Library Settings → Requests, you can set the default from and to email addresses, as well as the default subject for emailed requests.