

Manuale utente del plugin Web Librarian

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Introduzione

Questo plugin è nato come sistema portatile e multiplatforma per l'utilizzo da parte della Wendell Free Library durante la migrazione dal precedente sistema basato su schede cartacee a quello che prima o poi verrà fornito dal sistema bibliotecario regionale. Si è poi trasformato nell'erede web-based del programma Home Librarian 3 della Deepwoods Software.

Il plugin offre una gestione bibliotecaria web-based semplice e immediata, completa di catalogazione e sistema di prestito. Per ricercare e visualizzare elementi della collezione, potete usare gli shortcode disponibili. Ci sono anche diverse pagine di amministrazione dove potete gestire la collezione, gli iscritti della biblioteca e il banco prestiti.

Installazione e configurazione iniziale

Il plugin può essere installato direttamente caricando il file zip o usando l'installazione automatica dall'interfaccia di WordPress.

Ci sono delle opzioni che possono essere impostate, ma non sono necessarie per il funzionamento di base.

Configurazione opzioni

Sono presenti tre opzioni, tutte correlate all'uso dei web service di Amazon. Un account Amazon vi può tornare utile se intendete ricercare informazioni sugli elementi della tua collezione. Per fare ciò vi serviranno una chiave pubblica ed una privata per i web service di Amazon. Vi servirà anche un Amazon Associate Tag. Una volta ottenute tali chiavi, dovrete impostare correttamente le configurazioni:

1. **Chiave pubblica AWS** È la chiave pubblica che usi per accedere ai web service di Amazon.
2. **Chiave privata AWS** È la tua chiave privata per i web service di Amazon.
3. **Regione AWS** È la regione da usare per i web service di Amazon.
4. **Amazon Associate Tag** È la Amazon Associate Tag da usare.

Per utilizzare le funzioni di ricerca di Amazon è necessario impostare tutte e **quattro**.

Impostazione dei ruoli utente

Web Librarian aggiunge tre privilegi:

1. **manage_patrons** Permette di aggiungere, modificare ed eliminare gli iscritti.
2. **manage_collection** Permette aggiungere, modificare ed eliminare gli elementi della collezione.

3. **manage_circulation** Permette la gestione dei prestiti e la prenotazione di elementi.

E tre ruoli di utenza:

1. **Bibliotecario** Il ruolo di bibliotecario comprende tutti i privilegi menzionati, più il privilegio **edit_users**¹. Di solito questo ruolo viene assegnato al direttore della biblioteca.
2. **Assistente** L'assistente riceve i privilegi **manage_collection** e **manage_circulation** e così, oltre a poter gestire il banco prestiti, può aggiungere, modificare ed eliminare gli elementi della collezione.
3. **Volontario** Il solo privilegio del volontario è **manage_circulation**, che permette ad un volontario di gestire il banco prestiti.

Normalmente nelle piccole biblioteche solo il direttore o un bibliotecario anziano hanno l'autorità di aggiungere, eliminare e modificare le iscrizioni, visto che ciò regola anche l'accesso al prestito. Il ruolo dell'assistente corrisponde ad una persona autorizzata a svolgere mansioni di backoffice come gestire il banco prestiti e la collezione ed è tipicamente impiegato in biblioteche più grandi. I volontari sono persone che si possono occupare del banco prestiti e segnare quali elementi della collezione sono fuori e quali rientrano. Nel caso di biblioteche molto piccole tutti questi ruoli potrebbero essere ricoperti da una sola persona (il bibliotecario). Nota bene: tale utente non corrisponde all'amministratore del sito WordPress.

Shortcode per accedere alla collezione dalle pagine del sito

Dovrete creare delle pagine e inserirvi dentro uno o più degli shortcode disponibili, se volete rendere visibile e ricercabile la collezione dal vostro sito o blog. Attualmente sono disponibili tre shortcode:

1. **webbib_searchform** Questo codice genera un modulo per effettuare ricerche nella collezione. Accetta i seguenti parametri:

name Il titolo del modulo. Quello predefinito è 'searchform'.

actionurl Indirizzo di destinazione per il modulo. il valore predefinito è '' (Ciò significa che i risultati verranno mostrati sulla pagina stessa).

method Il metodo del modulo. Il valore predefinito è 'GET'.

Si possono effettuare ricerche per titolo, autore, argomento, parole chiave e codice ISBN. I risultati possono venire ordinati per codice interno, titolo o autore, in ordine discendente o ascendente.

I parametri seguenti saranno passati alla pagina di destinazione:

searchby Il campo per cui effettuare la ricerca. I valori validi sono: title (titolo), author (autore), subject (argomento), keyword (parola chiave), o isbn.

¹Necessario per poter associare gli ID iscritti agli utenti del sito.

searchbox Testo della ricerca.

webliborderby Il campo di ordinamento dei risultati. I valori validi sono: barcode (codice a barre), title (titolo), o author (autore).

webliborder Il tipo di ordinamento: ASC o DESC.

2. **weblib_itemlist** Questo shortcode genera una lista di risultati processando i risultati generati da **weblib_searchform**. Accetta i seguenti parametri:

name Il nome da dare al div contenente la lista degli elementi. Il valore predefinito è 'itemlist'.

perpage Il numero di elementi da mostrare su ogni pagina. Il valore predefinito è 10.

moreinfofourl L'indirizzo della pagina contenente informazioni dettagliate per un elemento selezionato. Il valore predefinito è ''.

inlinemoreinfo Se impostato come 'true' (vero), questo shortcode visualizzerà le informazioni dettagliate di un elemento selezionato. Il valore predefinito è 'false'.

holdbutton Se impostato come 'true' e se l'utente è collegato ad un id iscritto, questo shortcode fa apparire un pulsante che permette la prenotazione degli elementi trovati. Il valore predefinito è 'false'.

Questo codice richiama **weblib_itemdetail** per generare elenchi di elementi trovati visualizzati in breve o (se **inlinemoreinfo** è impostato come 'true') per generare la visualizzazione dettagliata dell'elemento selezionato (o del solo elemento trovato).

3. **weblib_itemdetail** Questo codice mostra un elemento in modo più o meno dettagliato. Di solito viene inserito in una pagina a sè stante (per esempio quella collegata a **moreinfofourl** passata a **weblib_itemlist**). Accetta i seguenti parametri:

name Il nome del div contenitore. Il nome predefinito è 'itemdetail[%i]'; il %i viene sostituito automaticamente con il codice a barre dell'elemento.

barcode Il codice a barre dell'elemento da visualizzare. Il valore predefinito è ''.

getbarcode Se impostato come 'true' (vero), questo shortcode otterrà il codice a barre dai parametri CGI. Viene solitamente utilizzato con il parametro **moreinfofourl** dello shortcode **weblib_itemlist**. Il valore predefinito è true.

holdbutton Se impostato come 'true' e se l'utente è collegato ad un id iscritto, verrà visualizzato un pulsante per la prenotazione degli elementi. Il valore predefinito è false.

detaillevel Livello di dettaglio della visualizzazione. Impostandolo su 'sintetico' (il valore predefinito) verranno visualizzati pochi dettagli. Ciò è utile nel caso di un lungo elenco di elementi (viene utilizzato dallo shortcode

weblib_itemlist per la visualizzazione di risultati multipli). Impostandolo su 'esteso' verranno visualizzati molti più dettagli (è ciò che fa lo shortcode **weblib_itemlist** per la visualizzazione di un singolo risultato).

moreinfourl URL della pagina dove sono visualizzate le informazioni riguardanti l'elemento. Il valore predefinito è ''.

Shortcode richiamato dallo shortcode **weblib_itemlist**. Non è da utilizzare direttamente, a meno che non si voglia mettere in risalto un elemento selezionato, usando una pagina apposita.

Semplice esempio

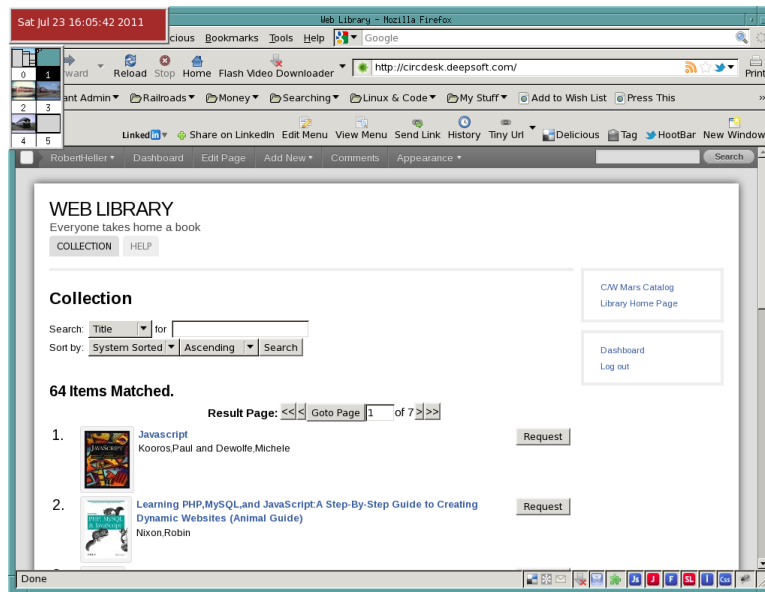


Figura 1: Lista di risultati in visualizzazione sintetica

Una pagina che include il contenuto seguente è sufficiente per avere un'interfaccia di ricerca nella collezione con visualizzazione dei risultati. The results of this page are shown in Figures and .

```
{{weblibsearchform}} {{weblibitemlist holdbutton=1
inlinemoreinfo=1}}
```

Profile / User Management

This plugin adds several pages to the user management / profile dashboard pages, upto 3 for non-privileged users and upto 4 for users with 'edit_user' privilege. These pages are:

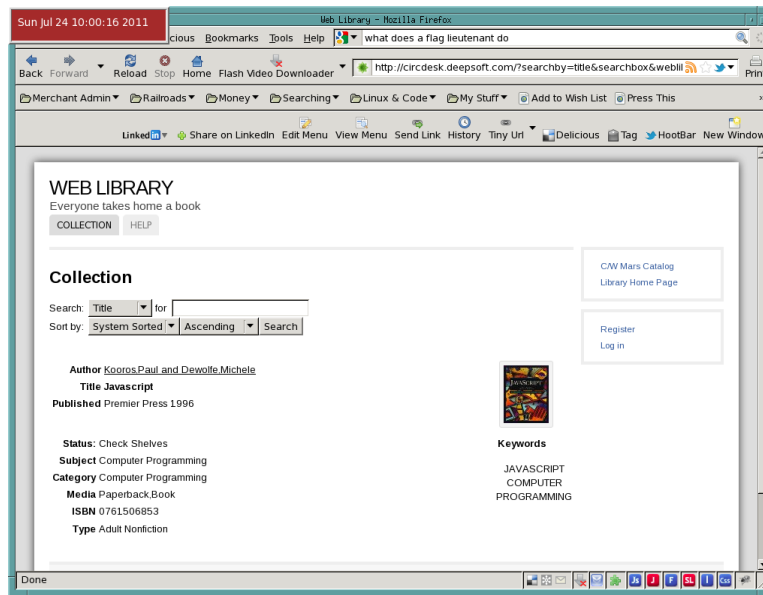


Figura 2: Singolo elemento in visualizzazione estesa

1. **Edit Patron Info** This page allows WordPress users to associate a library patron id with their WordPress username and to edit their patron name and contact information.
2. **Holds** This page allows WordPress users who have an associated library patron id to view their current list of holds (requests).
3. **Checkouts** This page allows WordPress users who have an associated library patron id to view their current list of checked out items.
4. **Add Patron ID** This page allows priviledged users users (typically librarians and adminstators) to associate patron ids with WordPress users.

Editing Your Patron Info

This page, shown in Figure allows WordPress users to first associate their WordPress username with a patron id and then allows them to update their name and contact information.

Items on Hold

This page lists the items a patron has requested a hold on. The patron can remove holds on selected items.

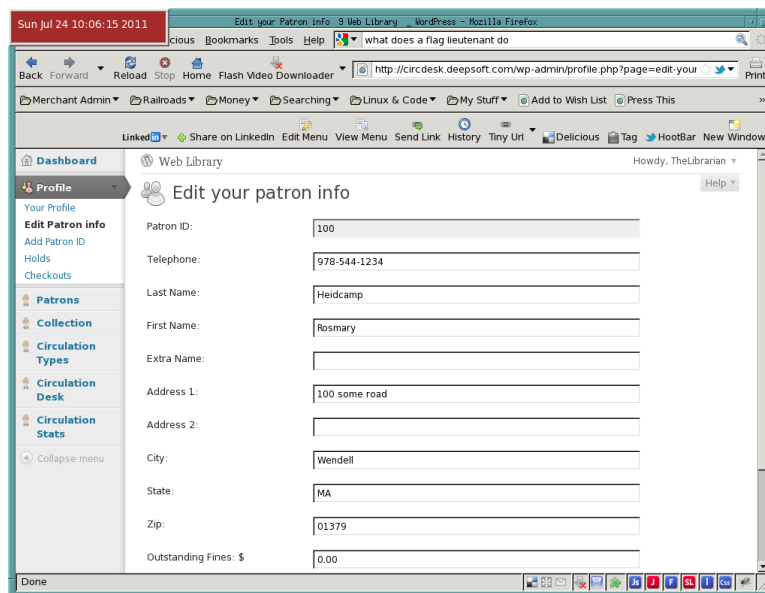


Figura 3: Editing Patron Info

Checked out items

This page lists the items a patron has checked out. The due dates are listed and the patron has the option of renewing items (up to a limit of 2 renewals).

Add Patron ID

This page, which requires privileged (**edit_users**), allows librarians and administrators to associate (or disassociate) patron ids with WordPress users.

Patron Management

Patron management entails the adding, removing, and editing of patrons and requires **manage_patrons** privilege. The main patron management page, shown in Figure , lists the patrons in the database. Patrons can be added one at a time or in bulk. Patrons can also be viewed or edited. Each patron has a unique id number, which is used when patrons either request holds or checkout items. Basic contact information is stored for each patron, as well as any outstanding files. Each patron also has an expiration date. Nothing special is done when the expiration date is passed. This is a bookkeeping feature to allow librarians to cull inactive patrons.

The Patron database can be downloaded as a CSV file and Patrons can be uploaded in bulk using a CSV file. The columns recognized are:

id The patron id.

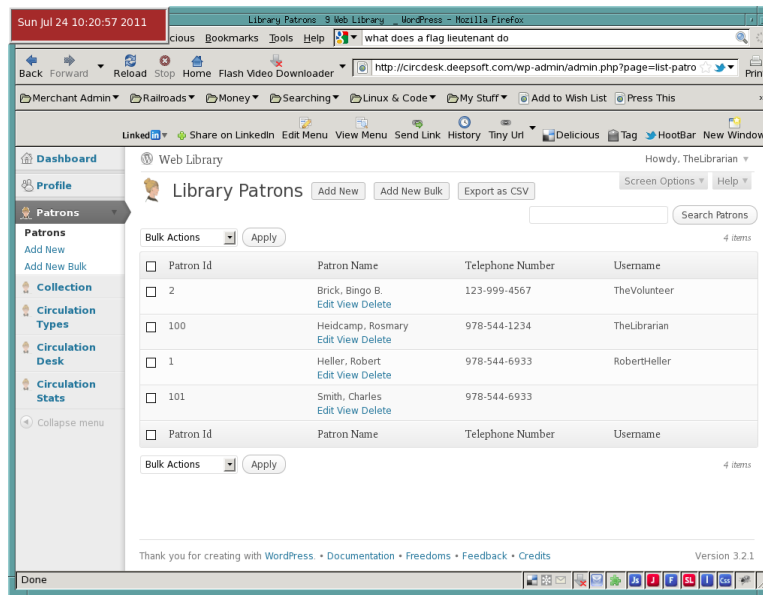


Figura 4: Patron List Page

firstname The patron's first name.

lastname The patron's last name.

extraname The patron's extra name (usually middle name).

address1 The patron's first address line.

address2 The patron's second (optional) address line.

city The patron's city.

state The patron's state.

zip The patron's zip code.

telephone The patron's telephone number.

outstandingfines The patron's outstanding fines.

expiration The patron's expiration date.

The minimum set of columns needed are **firstname**, **lastname**, **address1**, **city**, **state**, **zip**, and **telephone**.

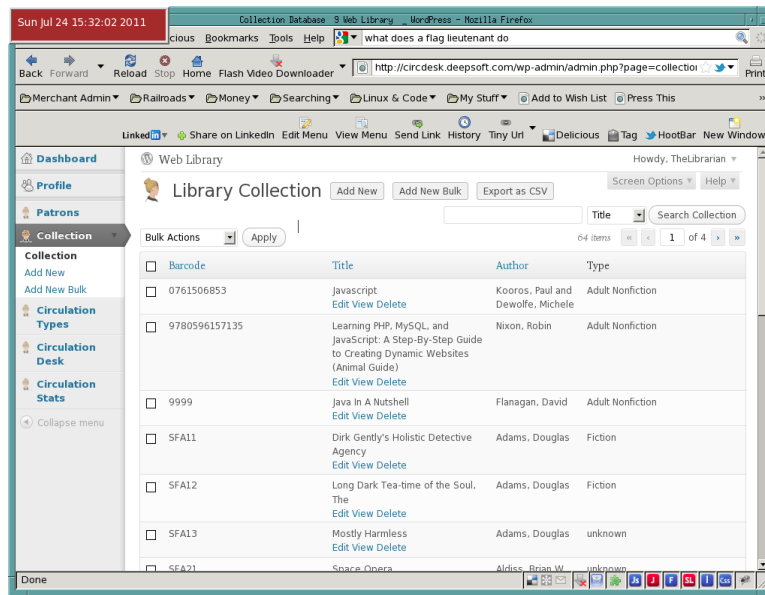


Figure 5: Collection Listing Page

Collection Database Management

Collection database management entails the adding, removing, and editing of items in your collection and requires **manage_collection** privilege. The main collection management page, shown in Figure , lists the items in your collection database. Items can be added one at a time or in bulk and can be viewed or edited. Each item has a unique “barcode”, which is up to 16 characters long. Often this is a digit string as returned by a barcode scanner, either from barcode stickers printed or purchased for this purpose or from printed UPC labels on the items themselves.

Items in the collection database can be searched by title, author, subject, ISBN, or keyword. The rows can be sorted by barcode, title, or author. And the whole database can be exported as a CSV file.

Adding and editing items in the collection database

On the add item page, shown in Figure , there are fields for all of the database columns of an item, including Barcode, Title, Author, Subject, Description, Category, Media, Publisher, Publisher Location, Publish Date, Edition, ISBN, Type, Thumbnail URL, and Keywords. Only the Title, Author, Subject, and Type are required. It is also possible to make use of Amazon’s extensive product database to find values for or to directly fill in these fields. Under the Amazon logo is a form for entering searches of Amazon’s product database, shown in Figure . Typical Amazon search results are shown in Figure and item lookup results are shown in Figure .

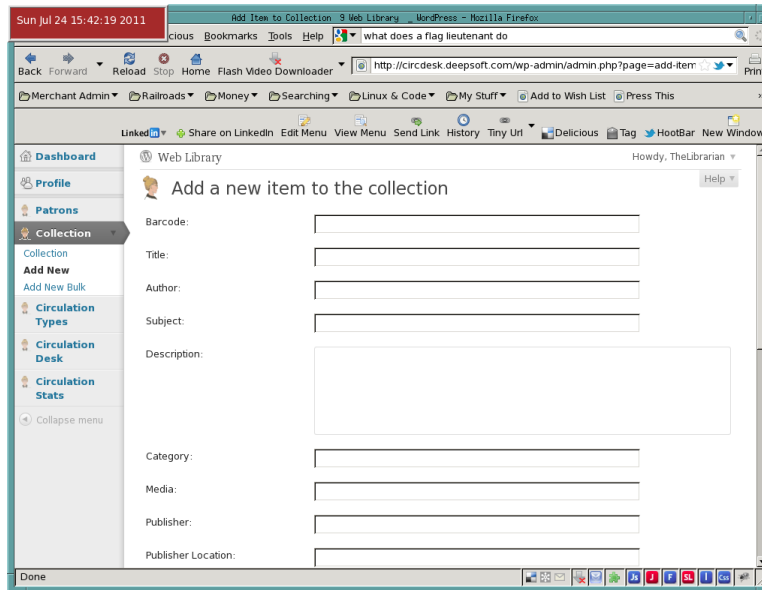


Figura 6: Adding an item to the collection

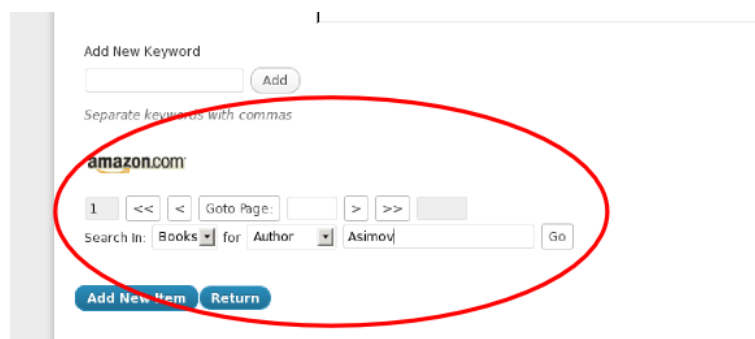


Figura 7: Amazon Search Form

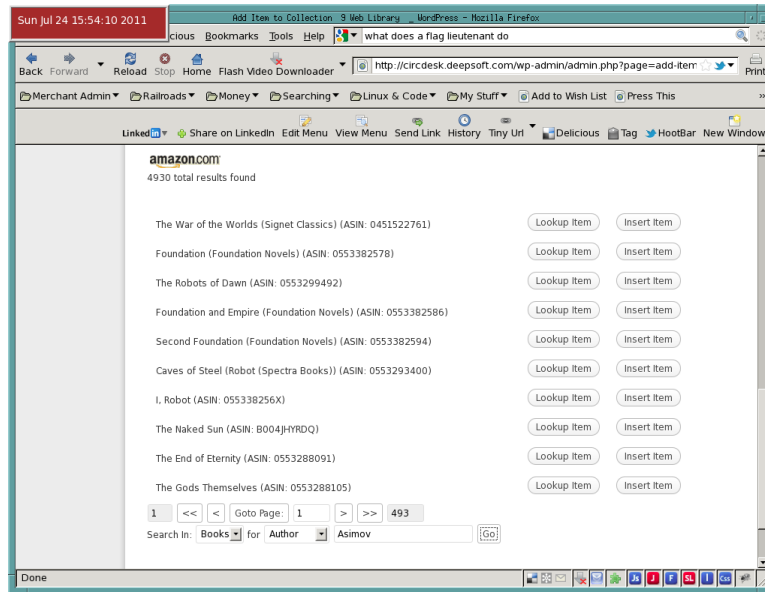


Figura 8: Amazon Search Results

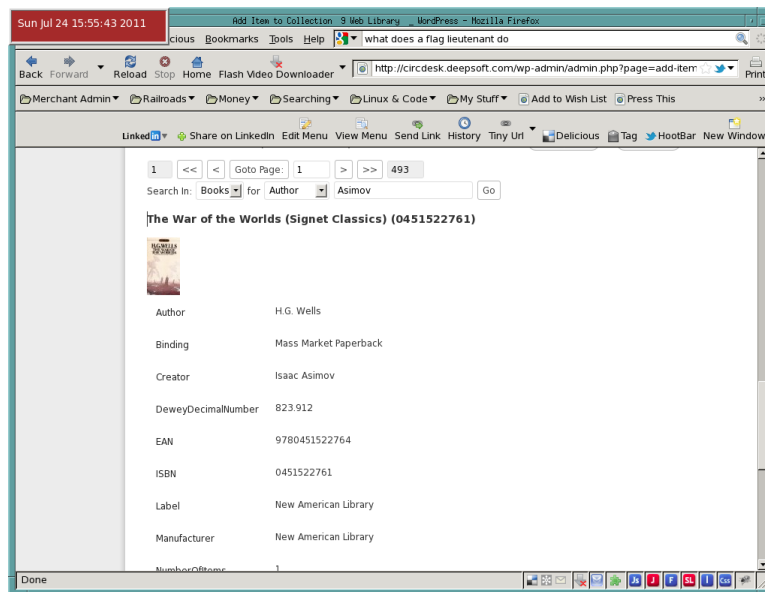


Figura 9: Amazon Lookup Results

Adding items in bulk to the collection database

A CSV file can be uploaded to add items in bulk to the collection database. The columns recognized are:

barcode This is the item's barcode.

title This is the item's title. It is required.

author This is the item's author. It is required.

subject This is the item's subject. It is required.

description This is the item's description.

category This is the item's category.

media This is the item's media.

publisher This is the item's publisher.

publocation This is the item's publisher's location.

pubdate This is the item's publish date.

edition This is the item's edition.

isbn This is the item's ISBN.

type This is the item's type. It is required.

thumburl This is the item's thumbnail URL.

keywords This is the item's keywords (as a quoted, comma separated list).

Circulation Type Management

Items in the collection database have an associated *Circulation Type*, which defines a loan period and is also used for statistical analysis. The circulation type management pages are used to manage these *Circulation Types*, where they can be listed (see Figure , new ones added, and existing ones edited.

Circulation Desk

The *Circulation Desk* page implements a virtual circulation desk, where circulation tasks can be performed. These tasks consist of checking out items, placing items on hold, checking in returns, listing patron and item circulation records, listing items on hold, and listing items checked out. There are six aspects of this page, representing the six functional modes:

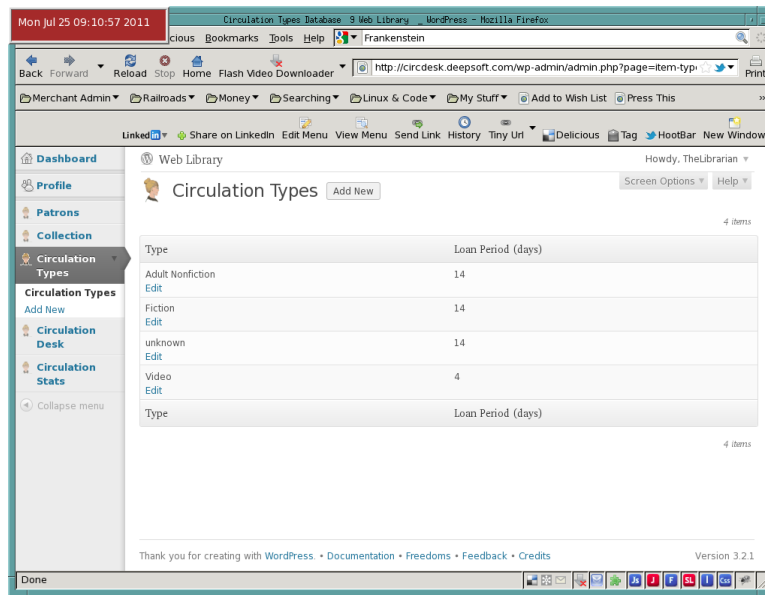


Figura 10: Circulation Types List page

1. **Main Circulation** This is the general entry mode, and list all items in the collection with their circulation status, described in Section .
2. **Item Circulation Record** This mode list the circulation status for a selected item in the collectection, described in Section .
3. **Patron Circulation Record** This mode lists the circulation record for a selected patron. This is a listing of items this patron has on hold or has checked out, described in Section .
4. **Circulation Hold List** This mode lists the items that currently have holds on them, described in Section .
5. **Circulation Checkout List** This mode lists the items that are currently checked out, described in Section .
6. **Circulation Checkin Page** This mode is used for checking in returned items, described in Section .

Main Circulation

The main circulation page is the initial aspect of the *Circulation Desk* page. It lists the the circulation records of all items² in the collection. The same searching and ordering as is available on the collection management page is available, as shown in Figure .

²A page at a time.

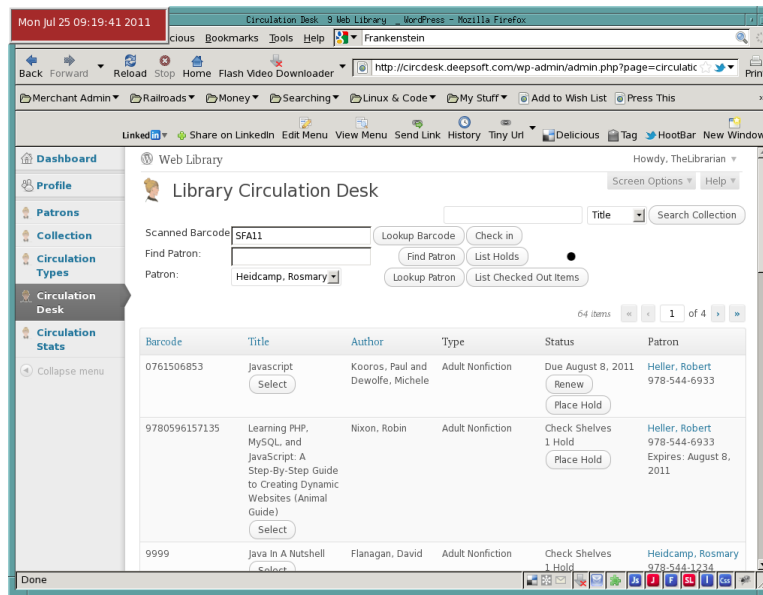


Figura 11: Main Circulation page

From this aspect all of the other aspects can be selected, by use of the various buttons at the top of the page:

Lookup Barcode This button looks up an item by barcode and displays the selected items circulation record (see Section).

Lookup Patron This button looks up a selected patron and displays the patron's circulation record (see Section).

Check in This button shifts to the returned items check in page, as described in Section .

List Holds This button shifts to the circulation hold list aspect, as described in Section .

List Checked Out Items This button shifts to the circulation checked out list, as described in Section

There is an additional button, the **Find Patron** button. This button does not change the page's aspect. Instead it does a search, by name, of the patron database and displays a drop down list of matches, from which a patron can be selected, as shown in Figure .

All of the item lists are same³, listing the item barcode, the item title, the item author, the item status, and the patron the item is checked out to or held by. If the item is neither checked out nor held, this last column is blank. If an item is both checked

³Except for the *Patron Circulation Record* listing, which omits the **Patron** column.

Scanned Barcode:

Find Patron:

Patron: Heidcamp, Rosmary

Buttons: Lookup Barcode, Check in, Find Patron, List Holds, Lookup Patron, List Checked Out Items, Select Patron

Figura 12: Patron Search Results

out and has a hold, the patron the item is checked out to is listed. If the item has more than one hold, the patron associated with the first (earliest) hold is listed. In the title column is a **Select** button that can be used to directly look up the item. If the item is checked out, there will be a **Renew** button in its status column. There will always be a **Hold** button in the status column, which will place a hold for the currently selected patron.

Item Circulation Record

Mon Jul 25 09:20:52 2011

Circulation Desk -- Circulation Record for SFA11

Scanned Barcode: SFA11

Find Patron:

Patron: Heidcamp, Rosmary

Buttons: Lookup Barcode, Check in, Find Patron, List Holds, Lookup Patron, List Checked Out Items, Back to Main Circulation

| Barcode | Title | Author | Type | Status | Patron |
|---------|---|----------------|---------|--------------------|------------------------------|
| SFA11 | Dirk Gently's Holistic Detective Agency | Adams, Douglas | Fiction | Due August 8, 2011 | Brick, Bingo B. 123-999-4567 |

Buttons: Select, Renew, Place Hold

Version 3.2.1

Figura 13: Circulation Record for a selected item (SFA11)

This aspect of the *Circulation Desk* page is shown when a specific item has been looked up or selected. Only the selected item is listed and an additional button is added

to return to the main aspect of the circulation desk page. A typical view of this page is shown in Figure .

Patron Circulation Record

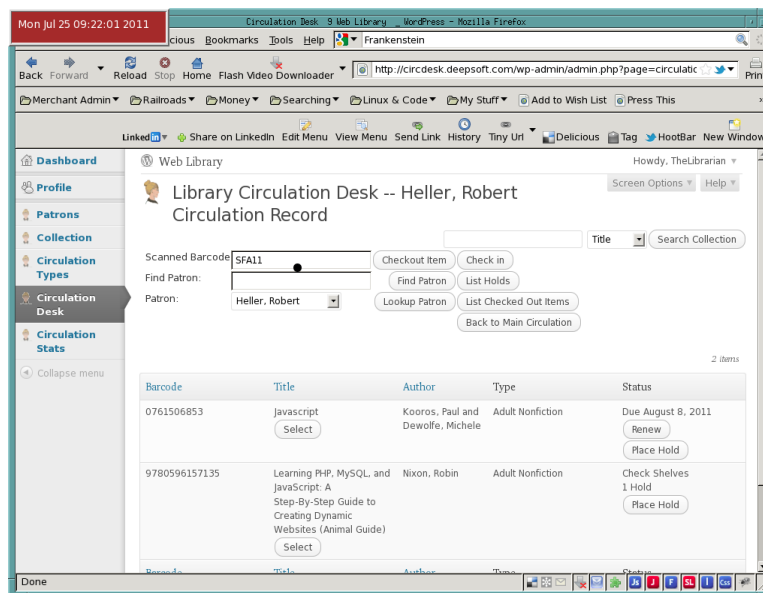


Figure 14: Circulation Record for a selected patron (Heller, Robert)

This aspect of the *Circulation Desk* page is shown when a selected patron is looked up. It displays the selected patron's held and checked out items. The **Lookup Barcode** button is changed to a **Checkout Item** button. This button will cause the selected item (barcode) to be checked out to the currently selected patron. Again, an additional button is added to return to the main aspect of the circulation desk page. A typical view of this page is shown in Figure .

Circulation Hold List

This aspect of the *Circulation Desk* page lists all items that currently have holds on them. An additional button is added to return to the main aspect of the circulation desk page. A typical view of this page is shown in Figure .

Circulation Checkout List

This aspect of the *Circulation Desk* page lists all items that are currently checked out. An additional button is added to return to the main aspect of the circulation desk page. A typical view of this page is shown in Figure .

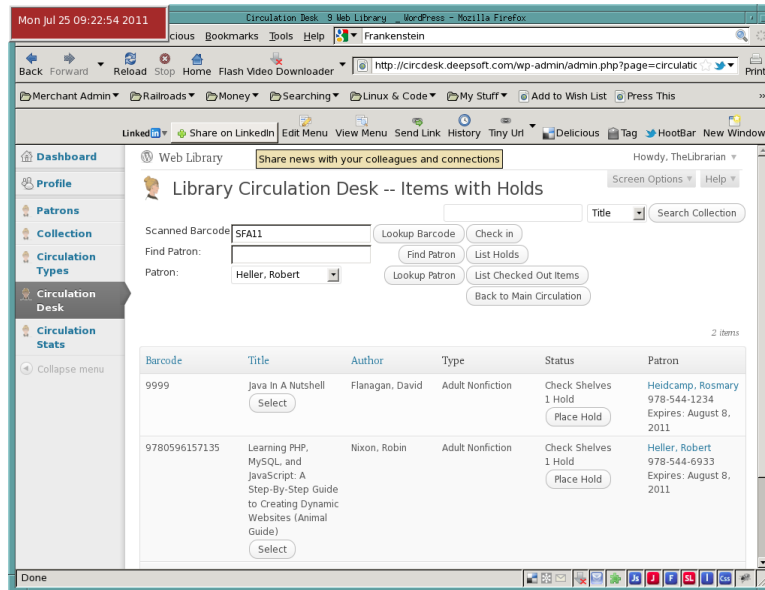


Figure 15: Circulation Hold List

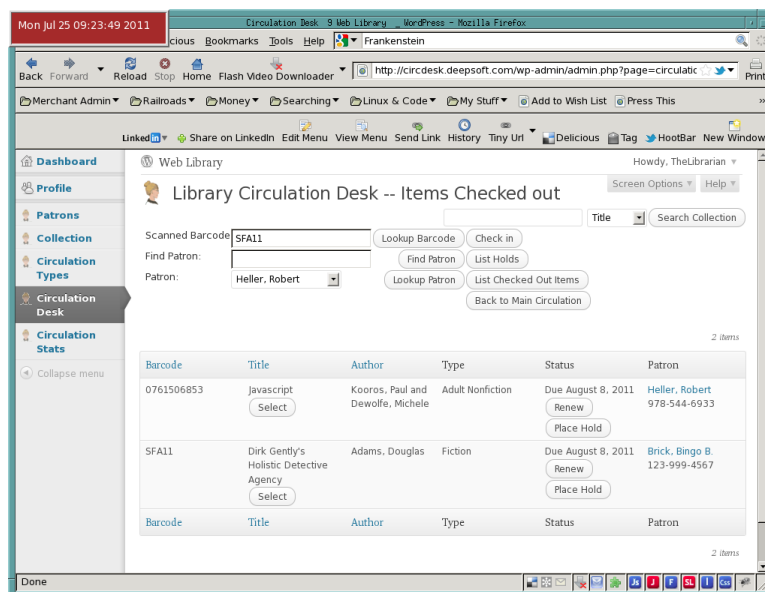


Figure 16: Circulation Checkout List

Circulation Checkin Page

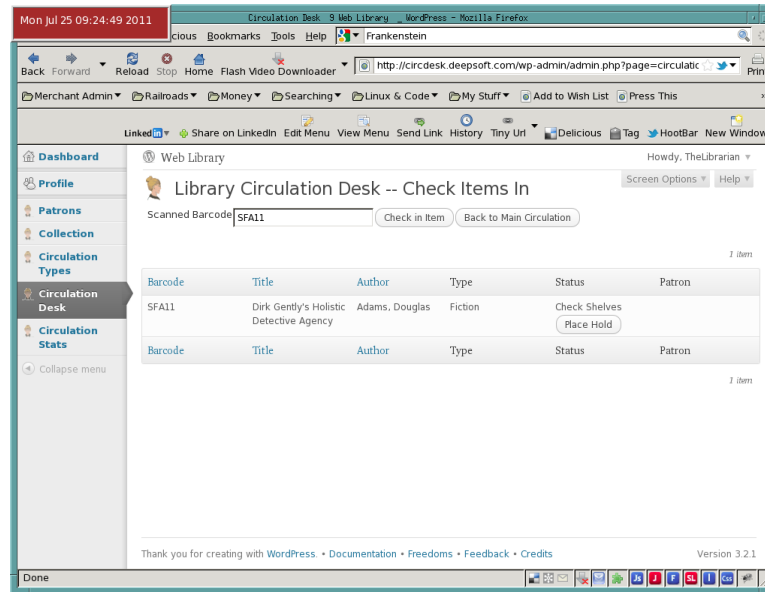


Figura 17: Circulation Checkin Page

This aspect of the *Circulation Desk* is used to check in returned items. As items are checked in, they are listed as a verification / sanity check. A button is provided to return to the main aspect of the circulation desk page. A typical view of this page is shown in Figure .

Circulation Statistics

Finally, circulation statistics can be viewed and downloaded using the circulation statistics pages. Circulation statistics can be listed by month (shown in Figure) or by monthly totals. The statistics can also be downloaded as CSV files.

Stylesheet selectors used by the short codes (front end).

weblib-button This selector is used with both input and a tags and defines how buttons look⁴.

From front.css:

```
/{*} All \textless{}input type=\char{"}\submit\char{"}
```

⁴With a (link) tags it makes the links look and act like buttons.

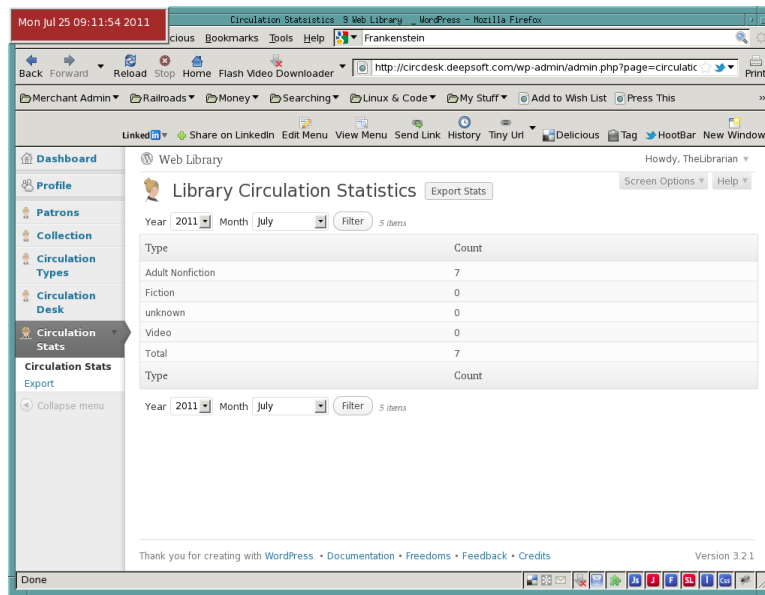


Figure 18: Circulation Types Statistics List page

... \textgreater{} and many \textless{} a href=\char'"\{} \char'"\{}... \textgreater{} have class=\char'"\{} weblib-button \char'"\{} -- the links are meant to look like buttons. I coded the submit buttons to have this class as well as the \textless{} a href\textgreater{}'s, so that they would all have the same styling. {*/} \par {*/} Common button styling {*/} / .weblib-button { border: outset 2px \#dcdad5; cursor: pointer; color: \#000000; background-color: \#dcdad5; } \par .weblib-button:hover { font-weight: normal; color: \#000000; text-decoration: none; } \par {*/} Links-as-buttons styling {*/} / a.weblib-button { height: 24px; white-space: nowrap; {*/} padding: 2px; {*/} padding: 0px; / {*/} margin-top: 2px; margin-bottom: 2px; {*/} / } \par a.weblib-button:link { font-weight: normal; color: \#000000; text-decoration: none; } \par a.weblib-button:visited { color: \#000000; font-weight: normal; text-decoration: none; }

weblib-total-results This selector is used with the total search results count.

From front.css:

```
.weblib-total-results { white-space: nowrap; font-weight:
bold; font-size: 150%;
float: left; }
```

weblib-item-table This selector is used with the tags that contain the search results.

From front.css:

```
.weblib-item-content-block, .weblib-item-table {  
display: table; }
```

weblib-item-row This selector is used with the tags that contain a row of search results.

From front.css:

```
.weblib-item-row { display: table-row; padding:  
8px 0px; width: 100%;  
}
```

weblib-item-index This selector is used with the tag that contains the result index.

From front.css:

```
.weblib-item-index { font-size: 150%;  
padding: 0px 4px; text-align: left; width: 5%;  
}
```

weblib-item-element This is used with the tags for a single item element.

From front.css:

```
.weblib-item-element { display: table-cell; vertical-align:  
top; padding: 2px; }
```

weblib-item-pagination-table This is used with the pagination at the top and bottom of multipage results.

From front.css:

```
.weblib-item-pagination-table { display: table;  
width: 40%;  
margin: 2px 30%;  
}
```

weblib-item-pagination This is used with the pagination at the top and bottom of multipage results.

From front.css:

```
.weblib-item-pagination { display: table-row; width:  
100%;  
padding: 8px 0px; font-size: 120%;  
}\par .weblib-item-pagination .pagelabel { vertical-align: top;  
display: table-caption; padding: 2px; font-weight: bold; }\par .weblib-item-pagination  
.pagelink { vertical-align: top; display: table-cell; margin: 0px;  
}\par .weblib-item-pagination .pagenumform { white-space: nowrap;  
width: 25%;  
}
```

weblib-item-long This is used with long display of a single item.

From front.css:

```
.weblib-item-long { display: table; }
```

weblib-item-head This is the item heading styling.

weblib-item-left This is the left side of the long item display.

From front.css:

```
.weblib-item-left { width: 90%;  
}
```

weblib-item-content-block This is the long item content block.

From front.css:

```
.weblib-item-content-block, .weblib-item-table {  
display: table; }
```

weblib-item-content-element This is the long item content element.

From front.css:

```
.weblib-item-content-element { display: table-row;  
}
```

weblib-item-left-head This is the long item left heading.

From front.css:

```
.weblib-item-left-head { font-weight: bold; text-align:  
right; display: table-cell; padding: 2px; }
```

weblib-item-left-content This is the long item left content.

From front.css:

```
.weblib-item-left-content { text-align: left; display:  
table-cell; padding: 2px; }
```

weblib-item-author This is the styling of the author name.

From front.css:

```
.weblib-item-author { text-decoration: underline;  
}
```

weblib-item-title This is the styling of the title.

From front.css:

```
.weblib-item-title { font-weight: bold; }
```

weblib-item-right This is the styling of the right side of the long item display.

From front.css:

```
.weblib-item-right { }
```

weblib-item-center-head This is the styling of the keyword heading of the heading.

From front.css:

```
.weblib-item-center-head { font-weight: bold; text-align: center; display: table-cell; padding: 2px; }
```

weblib-item-keyword-list This is the styling of the keyword list.

From front.css:

```
.weblib-item-keyword-list { text-align: center; display: table-cell; padding: 2px; }
```

weblib-item-thumb This is the styling of the thumbnail image.

From front.css:

```
.weblib-item-thumb { padding: 0px 4px; }\par .weblib-item-thumb  
img { min-width: 48px; min-height: 72px; }
```

weblib-item-holdbutton This is the styling of the hold (request) button.

From front.css:

```
.weblib-item-holdbutton { }
```

weblib-item-brief This is used to style the brief item display.

From front.css:

```
.weblib-item-brief { }
```

weblib-item-info This is used to style the item info.

From front.css:

```
.weblib-item-info { width: 85%;  
}
```