OpenOPAC
Installation Guide

Version 6.1

Last Updated: 19 May 2015
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WELCOME

Welcome to the OpenOPAC 6.1 Installation Guide.

Details on installing other components (such as the Amlib Client, ZServer and DIY Self Issues) are available in separate module specific Installation Guides.

OVERVIEW

The installation of the OpenOPAC involves the following steps:

1. Pre-requisites
2. Install the 5 required services
   - Apache Tomcat
   - Backend Services
   - Open Search Services
   - Open Frontend Services
   - Open CentralFrontend Services
3. Configure OpenOPAC
4. Configure styling and behaviour
5. It can be installed on the Amlib server, NetOpac server or a separate server depending whether it’s to be for internal use or external use

BEFORE YOU BEGIN THE INSTALLATION...

Before Installing OpenOPAC you must have upgraded to or installed Amlib 6.1 your server.

Read the Installation Notes First

Please carefully read the entire installation guide prior to commencing the actual OpenOPAC release installation.

If you have any questions please log a support call on TOPdesk
https://servicedesk.oclc.org/tas/public/index.jsp

If you do not know your TOPdesk login please email support-amlib@oclc.org and we will send it to you.

Serial Numbers Required for Installation of Amlib Modules

The OpenOPAC 6.1 installation requires a serial key. Your library is covered for installation & use of OpenOPAC by your Library’s Amlib NetOpac licence. Please contact Amlib Support via Topdesk https://servicedesk.oclc.org/tas/public/index.jsp before commencing the installation to receive this serial key.
**OPEN SUPPORTED OPERATING SYSTEMS & SYSTEM REQUIREMENTS**

|                  | • Windows 7                       |
| .Net Framework   | • 4.0 or later including Web Server (IIS) Support and HTTP Activation |
| IIS              | • 6.1 or later with ASP.net support installed |
| Java runtime     | • 6.1 or later                    |
| Memory (RAM)     | • Minimum 4GB                     |
| Hard Disk        | • Minimum 40GB depending on the size of the catalogue  
|                  | (Only applies to Solr search server) |
| Browser          | • IE 7 or higher                  
|                  | • Chrome, Firefox, Opera          
|                  | • Safari 5.1.7 or higher          |
| JavaScript       | • Must be activated               |
| Cookies          | • Must be activated               
|                  | • Automatic mobile device detection does not work without cookies.  
|                  | When cookies are disabled, the site can’t store culture information  
|                  | [eg. the language that is selected, and the date settings] and the login  
|                  | information is stored in a way that is considered to be unsafe. |

## PLEASE NOTE: If you have previously upgraded to Amlib 6 and have already installed OpenOpac at this time – we recommend you to totally uninstall the OpenOPAC and start over, using this new installer as this new installation corrects issues that other sites were having.
SECTION 1: PRE REQUISITES

If not installed already you must first install .NET Framework Full version 4.0 or later and Java runtime version 6.1 or later.

IIS with ASP.NET support must also be installed. For information on how to complete this please see Appendix A and B.

SECTION 2: INSTALL THE 5 REQUIRED SERVICES

OpenOPAC Software can all be found in the Version 6.1 folder, here under the ‘Set up Programs’ tab in the Amlib support section on the OCLC.org website.

Install Service 1: Install Apache Tomcat

1. Run the installer apache-tomcat-7.0.21.exe
2. Select Next
3. Select I Agree

4. Expand Tomcat in the tree and select Service Startup and Native, then Select Next

5. The configuration options screen can be left at defaults, Select Next

6. The Tomcat installer will try and find the location of the Java installation on the system, if this is incorrect please correct it then Select Next
7. Select the folder that you would like Apache Tomcat to be installed to, we recommend the default location, then Install

8. Tomcat will be installed
9. You can unselect Show Readme and then Select Finish. The service will then be started.
Install Service 2: Install OCLC Amlib Backend Services

1. Run the installer SetupOpenBackend.exe
2. Select Next

3. Select a Directory to install the Amlib Backend Service

4. Select Next
5. Select **Install**

![Image](image1.png)

6. Select **Finish** and the **Amlib Configuration Manager** should open automatically

![Image](image2.png)

7. The **AM** and **TE** databases will display as default

- **Please Note**: This configuration automatically has the **AM** [Live] and **TE** [Test] databases defined [but not set]

8. In the **Amlib Systems** tab, highlight the **Live** or **Test** database connector and Select the **Edit** button – the **System Editor** will open

9. If your database prefix is not ‘**AM**’ add a new connector by selecting the **New** button. On the **General** tab, enter the **Prefix** and a **Description**, otherwise continue with **step 6**
10. On the Databases tab, enter the following details:

- Choose the details for the RDBMS and OleDbProvider from the drop-down boxes

- Enter the details for the Lib database

- **Server** – enter the name of the Server running your Amlib databases
- **Instance** – enter an Instance (only if required – otherwise leave as Default, an example would be SQLEXPRESS)
- **Port** – enter a Port number (if required – otherwise leave as 0 [for unused])
- **User** – enter the Username for the database connection
- **Password** – enter the Password for the database connection – the username and password should be the same as that the login for your other Amlib databases. SYSADM/SYSADM is the default login for most Amlib database setups.

- Select the Copy to all button to copy the details to the other database fields

7. Select the OK button once complete – the System Editor window will close
Testing

Once complete, the connection can be tested:

1. Highlight the relevant database – for example: AM – and Select the Test button

![Test button](image1.png)

2. The Test Connections window will display with the result – if errors occur, the reason will display in the Error Details column:

   a. Test successful – all Results = OK:

      ![Test successful](image2.png)

   Test unsuccessful – all Results = Fail with Error Details shown, Use the error details to guide you and go back and check your configuration:

      ![Test unsuccessful](image3.png)

3. Select the Close button to close the Test Connections screen
Configuring the connection for OPEN

1. Select the OPEN tab
2. Select the Database prefix for the one that has been configured

3. Select an Amlib Operator for example, OPAC, STAFF [depending on how it's been setup]

4. Select Save
5. Select Exit
Install Service 3: Install OCLC Open Search Services

1. Run installer SetupOpenSearch.exe
2. Select Next

3. Select a Directory to install Open Search

4. Select Next
5. **Select a location** to install the Solr data and configuration, we suggest creating a folder for it.

![Image of Installation Paths]

6. **Select Next**

![Image of Ready to install OCLC Open Search]

7. **Select Install**

![Image of Completed the OCLC Open Search Setup Wizard]

8. Select Finish

**Install Service 4:** Install OCLC **Open Frontend Services**

1. Run installer `SetupOpenFrontend.exe`
2. Select Next

![Welcome to the OCLC Open Frontend Setup Wizard](image)

3. Enter your **Serial Number** provided by OCLC

![Serial Number entry screen](image)

4. Enter the **host name**, this should be the host name of the server/computer or if it is only to be accessed via network or a public domain name eg: [http://library.yourinstitution.com](http://library.yourinstitution.com)
5. Enter the **port number**. This number should be the same as the port number your website runs off.

   **Note:** In most instances this will be port 80, however if you have NetOpac also installed on your server then you’ll need to select a different port number such as Port 81 for OpenOPAC.

![Port Number Image](image)

6. Select a **Directory to install** Open Frontend to

![Destination Folder Image](image)

7. Select **Next**
8. Select **Install**

9. Select **Finish**
Install Service 5: Install OCLC Open_CentralFrontend Services

1. Run installer SetupOpenCentral.exe

![Image of SetupOpenCentral.exe welcome screen]

2. Select Next

3. Choose a Directory to install Open Central Frontend to

![Image of Destination Folder dialog box]

4. Select Next
5. Select **Install**

6. Select **Finish**

7. A browser window will load. **Minimise** it as it will be needed later.
Configure Tomcat for Solr

1. Go to the bin folder of your Apache Tomcat Installation (Default: C:\Program Files\Apache Software Foundation\Tomcat 7.0\bin)

2. Right Click on Tomcat7W.exe and Run as administrator

3. Change to the Java tab

4. Under Java Options add the following line to the bottom of the list:
   -Dsolr.solr.home=...\SolrConfigAndData

   **NOTE:** The dots must be replaced by the Solr folder specified during the installation of the Search setup (step 5 on page 13)
5. Select **Apply**

6. Select on the **General tab**

7. Select **Stop** then Select **Start** [to restart the service]
SECTION 4: CONFIGURE OPEN

1. Open the browser window that you minimised before. It’s URL will be

2. If you plan to use the default configuration just Select save on this page and the system will notify you that it will recycle the app pools. If saving fails please contact customer support for assistance at support-amlib@oclc.org or call 1300 260 795

3. If you wish to have your own settings and not the default settings, then start the Central Frontend Service (this service). Check all web service addresses, and the desired connections between them (on the third tab – ‘connections’). Verify if the Solr settings on the fourth tab are correct and working.
4. Then save these settings (it is very important to Select save, even if you have not changed anything)

5. Now you can start the Opac Gui, the address will be http://servername/Main.aspx. The search will not return any items because the Solr database is not filled with catalogues yet. You can also test external or network access by navigating to the hostname entered in step 4 of page 14. eg http://library.yourinstitution.com

6. Before doing the initial load, there are some default Marc tags that are set to display in Open, Please Contact the Head Librarian to check these Marc tag settings before proceeding with install. As the librarian may wish to display specific tags in OpenOPAC. The Librarian will need to log in as the Administrator here http://servername/Main.aspx first, to set up these marc tags, before you can do the initial load.

7. To Log in as the administrator

Select > Log on tab
Username: Administrator
Password: 1234  [ this is the default PIN, but we recommend the Librarian changes this PIN after installation is complete]
Go to the **Configuration tab** > select **Marc Fields** > then set them as you wish and select > **SAVE**


9. Start the **Initial Upload** Data process. You can start them from the **Initial Upload Tab**. Try one Catalogue item upload first. Please specify a valid catalogue ID before you start the upload process. Please note that the stock item must be set to Opac? = Y and the catalogue must be set to Opac View Restriction = N. The Librarian will be able to assist with these settings.

10. Select on the **Initial Upload** tab and enter a valid catalogue reference number from Amlib and try uploading one catalogue [must do this TEST first to ensure all is correct]

Please wait while the process executes
The process will notify on success

11. If everything completed successfully the process to upload all catalogue items can be started. This may take between 10 and 60 minutes, depending on the number of catalogue records and the performance of the server. \[If you cannot complete the ‘Upload all Catalogues’, because it stops or you get an error message before it completes, please take a screenshot of the error and contact support-amlib@oclc.org or call 1300 260 795 for advice on how this can be resolved.\]

12. Start the upload of **Master data** (takes about 2 minutes)

13. Start the upload of **Suggestions** (about 20 - 30 minutes)

14. Open is now configured and ready for use – with its default settings

15. Librarians will then need to log in as an **Administrator** on OpenOPAC and set up their own Configurations for Open, its theme colours, image, Library name, searches, the screen displays and all the settings required for their library. The **configuration guide** is available in the OCLC Downloads and Software Updates section, Version 6 to help you configure your OpenOPAC.

**Options:**

16. If you decide to use SSL transport security, you have to create the according binding in IIS and connect a valid certificate with the binding. Client certificates are not necessary.
17. If you want to use net.tcp as protocol for communication between the internal web services, you have to enable net.tcp on the virtual directory and enable net.tcp in the bindings of the web site (Not the virtual directory).

18. If this doesn’t work check if net.tcp is installed with the windows version you are using (go to your installed Windows Features - in Control Panel / Programs and Features / turn Windows Features on or off) and check you have activated ‘Windows Communication Foundation Non-HTTP Activation’ (found under ‘Microsoft .NET Framework 3.5 / 4.0 or higher’).
SECTION 5: TROUBLESHOOTING

What services do I need to check if none of the pages from OpenOPAC can be accessed?

- There are 2 potentials areas that may need attention:
  - **Tomcat:** This is most likely the issue. A better assumption can be made by inspecting the error being received.
  - **IIS:** There may be an issue with IIS or its configuration. This is less likely and once again troubleshooting will depend on the error received.

Where are the services that I need to check when OpenOPAC is not working correctly?

- There are four services that are application pools that can be accessed through IIS manager. These are:
  - Apache Tomcat
  - OCLC_Amlib_Backend
  - OCLC_Open_CentralFrontend
  - OCLC_Open_Frontend
  - OCLC_Open_Search

How do I restart Tomcat if this stops working?

- Find the Apache Tomcat Service inside Windows Services and restart it.

How do I restart the central front-end services?

- This can be done by restarting IIS or recycling the application pools through IIS manager.

How do I restart Central services?

- This can be done by restarting IIS or recycling the application pools through IIS manager.

When do I need to use the SAVE function?

- As part of the initial configuration and when you have made supervisor/parameter changes in the Amlib client, so the changes will be sent and updated to OpenOPAC.

If you cannot complete ‘Upload all Catalogues’ when doing the Initial Load, because it stops or you get an error message before it fully completes …

- There could be an issue with your tables or indexes in the database, please log a support call on TOPdesk and attach a screen shot of the error message. If you do not know your TOPdesk login please email support-amlib@oclc.org and we will send it to you.

Have I installed the 4 main services?

- To check if you are unsure you have done all of them, before proceeding > go to C:\inetpub\wwwroot\ in this folder you will see 4 folders with the following names: Backend Services; Open Search Services; Open Frontend Services; Open CentralFrontend Services
How do I check if a catalogue update/change has occurred in OPEN?

- Go to Main > Supervisor > Supervisor > Library Menu > OpenTransactions – you can see what has been updated and is waiting to be transferred across to Open.

- Highlight the record in question: you can either select F4 Delete to delete an update or select F5Query to check whether it’s been updated yet.
  - If it has, it will disappear from this table, when you select F5Query.
  - If you select F8Cat you will see what Catalogue record has been updated or is awaiting update in Open.

How do I ensure parameter changes I make in Amlib are transferred to OpenOPAC [such as supervisor or loan parameter settings]?

- Go to the Open Central Fontend Gui
  and select > First Steps tab > select SAVE

When you get this error: Content from the Website listed below is being blocked by IE enhanced Security Configuration when you go to


And see the page load incorrectly - where it appears to all be on the one page and Tabs do not open
3. Make sure you can start OPEN to ensure the Connections are correct and the Service is working. The default should work.
4. From this Main page it is possible to set the Marc Tag parameters before doing the initial load to ensure the EFields. There are some default Marc Tags not already but these can be checked and additional Marc Tags added.
5. Navigate back to http://[OPENIP]:8981/DeferredFrontendDefault.aspx to complete the initial load of all the Catalogue items. If you are using Marc Tag parameter these can be viewed.
6. From the TAB "Initial Upload" by one CatalogueItem upload first. Enter a valid Cat Ref No from one of your catalogue items. This may take between 10 and 60 minutes, depending on the number of catalogue items.

7. Congratulations: you have finished the installation of OPEN!
8. If you decide to use SSL transport security, you have to create the relevant binding (for example Https) in IIS.

Please specify all protocols that are enabled in IIS. If the addresses specified here are invalid the Opac system will not work.

Lms Service Http: [OPENIP]:8981/BackendService/Services/LmsService.svc
Lms Service Https: [OPENIP]:8981/BackendService/Services/LmsService.svc
Search Service Http: [OPENIP]:8981/SearchService/Services/SearchService.svc
Search Service Https: [OPENIP]:8981/SearchService/Services/SearchService.svc
Central Service Http: [OPENIP]:8981/CentralFrontendService/CentralFrontendService.svc
Central Service Https: [OPENIP]:8981/CentralFrontendService/CentralFrontendService.svc
Frontend Service Http: [OPENIP]:8981/FrontendService/FrontendService.svc
Frontend Service Https: [OPENIP]:8981/FrontendService/FrontendService.svc

Please specify only protocols that are enabled in IIS. The connections specified here are to be used by the connections.

Direction:
FromAnyToCentralService
FromAnyToFrontend

Need to add this site as a trusted site

![Internet Options](image)
Add [http://openopac](http://openopac) as a trusted site select **ADD** and **APPLY**

Close and refresh browser:

It will now open correctly
APPENDIX A: INSTALLATION OF REQUIRED .NET COMPONENTS

Windows Server 2012

1. On the Start page, Select the Server Manager tile, and then Select OK.
2. In Server Manager, select Dashboard, and Select Add roles and features.
3. In the Add Roles and Features Wizard, on the Before you begin page, Select Next.
4. On the Select installation type page, select Role-based or feature-based installation, and Select Next.
5. On the Select destination server page, select a server from the server pool, select your server, and Select Next.
6. On the Select server roles page, expand Application Server and ensure the following is installed:

   ![Image of Application Server roles]

7. On the next page make sure the following are installed:

   ![Image of .NET Framework 3.5 Features]

8. Confirm and finalise installation, please note that you may require the Windows Server 2012 installation media to complete this installation

Windows Server 2008

Please run the .NET installer provided with the OpenOPAC installers.
Install IIS with .NET support on Windows Server 2012

1. On the Start page, Select the Server Manager tile, and then Select OK.
2. In Server Manager, select Dashboard, and Select Add roles and features.
3. In the Add Roles and Features Wizard, on the Before you begin page, Select Next.
4. On the Select installation type page, select Role-based or feature-based installation, and Select Next.
5. On the Select destination server page, select Select a server from the server pool, select your server, and Select Next.
6. On the Select server roles page, select Web Server (IIS), and Select Next.
7. On the Select features page, Select Next.
8. On the Web Server Role (IIS) page, Select Next.
9. On the Select role services page, note the preselected role services that are installed by default, expand the Application Development node, and then select ASP.NET 4.5. (If you installed .NET 3.5, select ASP.NET 3.5 also.)
10. On the Summary of Features to install page, confirm your selections, and then Select Install.
11. In the Add features that are required for ASP.NET 4.5? box, Select Add Features.

- The following additional features are added:
12. .NET Extensibility 4.5
13. ISAPI Extensions
14. ISAPI Filters
15. .NET Extensibility 3.5 (If ASP.NET 3.5 was selected)
16. Select Next.
17. On the Confirm installation selections page, Select Install.
18. On the Installation progress page, confirm that your installation of the Web Server (IIS) role and required role services completed successfully, and then select Close.
19. To verify that IIS installed successfully, type the following into a web browser:
http://localhost
The default IIS Welcome page is displayed.
Install IIS with .NET support on Windows Server 2008 or 2008 R2

1. Select Start, point to Administrative Tools, and then Select Server Manager.
2. In Roles Summary, Select Add Roles.
3. Use the Add Roles Wizard to add the Web server role.
4. On the Select Role Services page, note the preselected role services that are installed by default, and then select the following additional role services:
   - ASP.NET
   - .NET Extensibility
   - Request Filtering
   - ISAPI
   - ISAPI Extensions
5. On the Summary of Features to install page, confirm your selections, and then Select Install.
6. On the Installation Results page, confirm that your installation of the Web Server (IIS) role and required role services completed successfully, and then select Close.
7. To verify that IIS installed successfully, type the following into a Web browser:
   http://localhost
   You should see the default IIS Welcome page.

Install IIS with .NET support on Windows 7 and Windows Vista

1. Select Start, and then Select Control Panel.
2. In Control Panel, Select Programs, and then Select Turn Windows features on or off.
3. In the Windows Features dialog box, Select Internet Information Services to install the default features, and then select the following additional features:
   - ASP.NET
   - .NET Extensibility
   - Request Filtering
   - ISAPI
   - ISAPI Extensions
4. Select OK to close the Windows Features dialog box.
5. To verify that IIS installed successfully, type the following into a Web browser:
   http://localhost
   You should see the default IIS Welcome page.
APPENDIX C: LANGUAGE AND DATE CONTROL OF BROWSERS VIA IIS SETTINGS]

To control the language setting of all your browsers in your institution/library who are accessing the OpenOPAC, you will need to change 2 settings in IIS [Internet Information Services manager]

Open IIS7

Highlight OpenOpacGui in your sites folder on the left

Select Net.Globalisation from the ASP.NET box under OpenOpacGui home Page

There will be a drop down menu besides Culture and UI Culture

Change both of these to English (Australia) (en-AU) and then select Apply in the top right hand corner.

This will ensure that the flag in the top right hand corner of your browser when you access the OpenOpac will always be the Australian flag. This setting appears to affect Chrome, Firefox and IE.
APPENDIX D: FORCING COMPATIBILITY MODE TO BE TURNED OFF IN IIS7

If OpenOPAC is opening in Compatibility Mode when using Internet Explorer it can be turned off via IIS. This is recommended if external users are accessing the website and having Compatibility Mode issues.

IIS 7 and IE 7 -9

1. Open IIS [Internet information Service Manager]
2. Highlight OpenOPACGui
3. Select HTTP Response Headers from under OpenOPACGui home page

4. Select Add on right –top hand side

5. A pop-up box labelled Add Customer HTTP Response Header will appear

6. Type in X-UA-Compatible in the Name field
7. Type in IE=8 Value field
8. Then select OK
9. This will cause IIS to open in Internet Explorer to display OpenOPAC as if it was Internet on Explorer 8.
IIS 7 and IE 10 -11

1. Open IIS [Internet information Service Manager]
2. Highlight OpenOPACGui
3. Select HTTP Response Headers from under OpenOPACGui home page

4. Select Add on right –top hand side

5. A pop-up box labelled Add Customer HTTP Response Header will appear

6. Type in X-UA-Compatible in the Name field
7. Type in IE=EDGE Value field
8. Then select OK
9. This will cause IIS to open in Internet Explorer to display OpenOPAC with compatibility mode turned off [Warning Edge is sometimes unstable and is considered the setting for non-production sites, if you have any issues using this setting, then try IE=8 as the value instead]
APPENDIX E: TO HAVE A PUBLIC [EXTERNAL] FACING OPENOPAC

So that your OpenOPAC can be accessed from a webpage [publically] such as a council site or maybe a school website. There are two choices depending on how your network is set up, what is accessible and what is not and what your institutions preferences are.

OpenOPAC can be installed anywhere on your Network, it does not need to be installed on your Amlib server or even on an Internal server, as long as OpenOPAC has access to the Amlib databases that is all that is required for it to run. Some clients will install this program on a Web-Server or in a De-militarized zone [DMZ] so it can be accessed by all anywhere. While others prefer to have their own internal set up.

If it has been installed on an Internal Server that has other important resources on it that you don’t want public to access, but is fine for library to use. Then we suggest you set up a second install of OpenOPAC on a Web-server that can be accessed by the public.

If you want to set up a second install Of OpenOPAC for this purpose, so they can be accessed publically on a council or school web-page – see point 2

1. If installing on a web-server or in a De-militarized zone (DMZ) only

1. Install OpenOPAC on a web server or in a De-militarized zone (DMZ)
2. Install it on a different port from the default HTML port 80 - such as port 81
3. Ensure you put in the correct Hostname for this webserver when installing for the Hostname
4. Ensure that port 1433 is open on the webserver [for two-way traffic] – so it can access the Amlib databases – this is the only access OpenOPAC needs (everything else can be locked down and not accessible)
5. If using an enrichment provider such as Amazon.com or Syndetics etc. You will need to ensure that this web-server allows access to these sites by either adding them as exceptions to the firewall rules or add them as trusted sites. Otherwise images and content will not appear.
6. Also either have pop-up blockers turned off or sites such as www.amazon.com or http://www.syndetics.com/ enter them as exceptions to the pop-up blocker rule or add as trusted sites
2. If this is a Second Install of OpenOPAC - You will need to do the following

1. Install another OpenOPAC on a web server or in a De-militarized zone (DMZ)
2. Install it on a different port 83 to your internal one
3. Ensure you put in the correct Hostname for this webserver when installing for the Hostname
4. Ensure that port 1433 is open on the webserver [for two-way traffic] – so it can access the Amlib databases – this is the only access OpenOPAC needs (everything else can be locked down and not accessible)

5. If Library is using an enrichment provider such as Amazon.com or Syndetics etc. You will need to ensure that this web-server allows access to these sites by either adding them as exceptions to the firewall rules or adding them as trusted sites. Otherwise images and content will not appear.

6. Also either have pop-up blockers turned off or sites such as [www.amazon.com](http://www.amazon.com) or [http://www.syndetics.com/](http://www.syndetics.com/) enter them as exceptions to the pop-up blocker rule or add as trusted sites

7. Then configure it the same as their internal one was configured
6. Load all catalogues etc.....
7. This new URL can put as a hyperlink on their council /library website that will go straight to OpenOPAC – giving them public access.