Aleph Update

IGeLU – Haifa
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Agenda

- Aleph today
- Aleph roadmap
- V21 highlights
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Aleph today

- 2320 institutions worldwide
- 75 Aleph customers in the Times top 200 university rankings
- 46 new Aleph customers from January 2010
Agenda

- Aleph today
- Aleph roadmap
- V21 highlights
Aleph Roadmap

- V20.0 – Major Release
  - Available – March 2009
- V20.1 – Minor Release
  - Available – October 2009
- V20.2 – Minor Release
  - Available – August 2010
- V21.0 – Major Release
  - Planned - January 2012
- V22.0 – Major Release
  - Planned - December 2012
Agenda

- Aleph today
- Aleph roadmap
- V21 highlights
User Groups initiated enhancements

- Cash workflow enhancements (CIRC) –
  - "Enter Waive Text" box will be allow for the option of not adding a note
- Billing notes
- In the patron’s library account under the fines/fees tab, include the author, bibliographic info and year of the material associated with each fine
- Multiple AVA fields in expand_doc_bib_avail (SYS) - Modify expand to produce multiple AVA fields when multiple locations exist
- Cataloging Edit Menu enhancement (CAT) - Add a configuration in INI file to decide which short-key will be used for each menu
User Groups initiated enhancements

- Encumbrances renewed may be based on last paid amount (ACQ) -
  - Adding to the service Renew Order Encumbrances for Serials and Standing Orders (acq-06-b) the option to base the next year encumbrances on the actual paid amounts (from the invoices) in the current year

- Multi-Item Display in Course Reserves (CIRC) –
  - For multi item BIB - the operator will be able to determine which items display or do not display in the OPAC Course search (based on parameter)
User Groups initiated enhancements

- Patron information display in ILL Request (ILL) –
  - Adding patron status, patron type and patron expiry date to the display on ILL request tab - Request Info (GUI) as well as in different ILL patron letters

- Log changes to Patron Records (CIRC) –
  - Adding patron changes, done via GUI, to the CIRC logger (Z309)
User Groups initiated enhancements

- Limitation of renewal in Renew Items on Loan service (p_cir_o8) –
  - The service allows patrons' loans to be renewed according to various criteria
  - Additional criteria to be added - limit the number of batch renewals
  - This would allow to process the first few renewals automatically by the batch process, requiring later renewals to be performed by the user via the OPAC

- Requesting multiple items from basket or e-shelf (SYS)
  - The user can place hold requests for multiple items selected within the e-shelf/basket in the OPAC
  - If any of the items cannot be requested, the user is presented with an error message
  - Additional information to be added explaining why each item can't be requested
User Groups initiated enhancements

- Validation of email address (CIRC)
  - When a patron's email address is added/changed in GUI circulation, OPAC or via X-Server, it will be validated for syntax and the existence of the remote mail server
  - The record will be updated regardless the validation result

- User-created expand routines (CAT) –
  - In tab_fix users are able create their own fix routines (for example in Perl language)
  - The mechanism does not exist in tab_expand
  - tab_expand will be modified so users can create their own expand routines
User Groups initiated enhancements

- Filter item lists by sub-library and year in the GUI (CAT)
  - Item lists in the GUI have sort options but no filtering
  - As these lists can get quite long (particularly for serials) sub-library and year filters will be added to item lists
- Loan of similar items (CIRC) –
  - Currently checking for like-items is supported when placing hold request only but not when loaning items
  - A new tab_check_circ will be added which will alert if similar items are loaned to the same patron
User Groups initiated enhancements

- Controlling transactions subject to circ cash limits
  - Cash types will be added as an optional parameters along with a parameter indicating whether these should be included/excluded when calculating balances against circ cash limits
  - New check_circ routines will be created for that purpose based on:
    Check_circ_5
    Check_circ_5_b
    Check_circ_9_a
    Check_circ_10_a

- Additional hold request checks (CIRC)
  - Adding hold request checks for the patron blocks, overdue, cash limits and loan limits like in tab_check_circ (for loan), whenever this is relevant for holds
User Groups initiated enhancements

- Further SIP2 enhancements (CIRC)
  - Analysis of the following:
    - Improvements in handling of partial payments and overpayments
    - More flexible configuration of sign-in only IDs and IDs which require pin-code
    - Separating the self-service and GUI circulation checks
    - Support for more than one automated book sorter configuration
    - More options for sorting returned items and identifying exceptions
    - Better trapping of items with hold requests
    - Improvements in handling offline circulation
User Groups initiated enhancements

- Leaving changed item without saving (CAT)
  - In GUI Cataloging – Item List – a warning message will be displayed when the user has changed an item record and is selecting a new item without saving the change(s)
  - The warning will be flag depended
- HTML format patron notices within body of email rather than as attachment (CIRC)
  - A new email method will be introduced allowing sending emails with the HTML file formatted inside the body of the email
- OPAC - history of hold requests
  - Adding to Patron’s library account (in OPAC) Hold Request History (similar to Loan History)
User Groups initiated enhancements

- Server-side scripting support for OPAC (OPAC)
  - Adding an option to run an external script from within an html page using special tag and syntax
  - Adding an include html file to all web pages that will add environment variables relevant for the current session (patron, search etc) to be used by external scripts

- Display item call number and a loan counter during loan session (CIRC)
  - Item call number and loan sequence number will be added as new columns in the Loan List at the Loan session window
User Groups initiated enhancements

- Use of the comma in scripts for correction of records in Aleph sequential format (CAT)
- Enhance infrastructure of fix_doc_do_file_08 to use fixed parameters instead of comma delimited
- Enable correction of catalog records with text that includes comma by allowing a comma to be included in the string to be searched for and in the replacement string
Label printing for a chosen group of items

- GUI Item List - it is now possible to select multi lines for label printing
- The order of printed labels will be the same as the order of the items list display (as set in the Sort Option)

Generating labels for the selected items
Request Confirmation Screen

- A patron submits a hold request. The following form is filled (by patron or by the system) and the end user press “Go” (current mechanism):
Request Confirmation Screen

- The Hold Request details page is displayed (current functionality)
- Now, this page contains also bibliographic and item information:
Request Confirmation Screen

- Back button - the Hold Request form will be displayed again (including all the detailed filled in by the end user)
- When clicking the Go button the request is confirmed by the patron and a hold request record (Z37) is created
Request Confirmation Screen

- After clicking the GO button a message will appear on the full view of the chosen record.
- The message contains the pickup location for the requested item.
Automatic update of Item’s arrival date

- Providing an automatic update of item’s arrival date based on its related monograph order’s arrival date
- Based on parameter: ITEM-DATE-FROM-ORDER
- This flag will be consulted upon registering arrival of monograph order and determine whether or not the related item’s arrival date will be updated
- If the item’s arrival date is already populated, there will be no automatic update
- The operator will be able to manually update the item’s arrival date
Automatic update of Item’s arrival date

- Applied for the following monograph order arrival workflows:
  - GUI – ACQ - Arrival of a single monograph order
  - GUI – ACQ - Bulk arrival of monograph orders
  - GUI – ACQ - Registering arrival when monograph order’ line item invoice is registered
  - Batch service: Load Invoice and Line items (acq-32)
Automatic update of Item’s arrival date

Arrival Form for a monograph order:

Item:
Enhanced Photocopy Workflows

- Introduction of new statuses – Filled, Supplied, Refused, Deleted
- Photocopy request form fields in Web OPAC are pre-populated with bibliographic information according to relevant document
- It is possible to perform “Shipping” on selected photocopy requests of the same patron
- It is possible to view photocopy requests history in GUI CIRC
Enhanced Photocopy Workflows

- Introduction of new statuses:
Enhanced Photocopy Workflows

- Photocopy Request Shipping - a new button was introduced in photocopy requests list under patron tab:
Enhanced Photocopy Workflows

- Photocopy Request Shipping – clicking on the “shipping” button will result in the following:
  - Cash transaction for “photocopy shipment” will be created
  - Invoice of all related cash transactions will be printed
  - After invoice is printed, the requests’ status will be changed to “Supplied”, and the requests will be moved to z38h photocopy requests history table
Enhanced Photocopy Workflows

- Displaying Historical photocopy requests (new table Z38H)
Automatic reflection of changes in linking Authorities

• When the Authority preferred term (1XX) is updated and the term is present in other Authority record(s) as see also (5XX) – the 5XX will automatically be updated (control subfields will stay in place)

• A new fix routine - fix_doc_aut_5xx
Serials Batch Claim – additional parameters

- Serials Batch Claim (serials-44) service now includes Order Unit and Method of Acquisitions filters
- Allow filtering the input of the batch to produce claims for items which are related to the desired order unit and acquisition method
- The print templates were enhanced to include, among other data, the following information:
  - Order Unit
  - Method of acquisition
  - Vendor code and name
Serials Batch Claim – additional parameters

Print Claim Letters/Report (serial-44) - USM50

Sort Report Output By: Title

Item Sublibrary:
- All
- Medicine Library
- East Asian Library
- Humanities Library
- Main Undergraduate
- Law Library
- Economics Library

Vendor Code

Order Unit:
- None
- Humanities (Ordering Unit)
- East Asian (Chinese)
- East Asian (Japanese)
- East Asian (Korean)
- East Asian (Vietnamese)
- East Asian (Western)

Method of Acquisition:
- None
- Purchase
- Gift
- Approval
- Collective
- Deposit account record
- Depository item

No.of Claims Filter: Any Claim
Enumeration/Chronology

- Support all levels of enumeration/chronology
- New oracle table was introduced - Z103-X. It is an expansion of Z103 table and includes the new levels
Enumeration/Chronology – based on another item

- It is possible to fill in the enumeration/chronology information based on another item identified by its barcode.
- A new option was introduced in the “Edit Actions” menu (available also using right click in the cataloging draft) - “expand from item”, which will open form for entering an item barcode.
Enumeration/Chronology – based on another item
Updating Enumeration/Chronology

- When item’s enumeration/chronology is updated (including binding):
  - New LKR is created in the linked BIB record with the updated enumeration and chronology information
Renewing ILL Requests

- Renew is now supported
  - For the following workflows:
    - ILL module
    - Circulation patron's loans list
    - WEB OPAC
    - RestFull APIs
  - For the following ILL Protocol type:
    - ISO
    - Danzig
    - SLNP
    - Letter protocol
    - BL Protocol
- Difference how the renew is handled:
  - SLNP – actual renewal
  - Other protocols – request to renew
- Renew outside of the ILL module will be allowed only if PAT-RENEW-ILL is set to Y in tab100 of the ILL library
NCIP

- The Shipping Note in the "RequestItem" message is now supported and can be used to add any relevant free text such as the requested volume information.
- This information will be stored in the hold request record created on the Aleph side and can be used by the operator.
Other

- MAB to MARC – GND Authority project
- RVM thesaurus support
Performance Improvements

- Added parallel processing based on parameter
  - Ongoing Indexing (UE01)
  - Catalog Records Retrieval (Ret-01)
  - Global Changes for Items (Manage-62)
- Batch Word index building (Manage-01) – it is now possible to use existing dictionary (Z97) w/o re-building it (based on parameter)
- GUI – improved response time (technical changes)
  - Panes with scrolling
  - Items display
Technical

- Oracle 11.2
- RH 6
- Certification for SUN Solaris 5.10 x86
- Separate batch server topology improvements
• ARC 3 will be released together with V21
• Oracle 11.2
• Performance improvements in full ETL
• Incremental ETL for all data types
• Many additional fields
• New domains: CIRC logger and Photocopy
• Infrastructure (in Aleph) to define 70 bibliographic fields to be exported to ARC
• Note: Sizing might be impacted
Agenda

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A Future Path for Every Customer

Aleph 20 → v21 → v22 → v23 → ...

Voyager 7 → v8 → v9 → v10 → ...

Alma → Update → Update → Update → Update → Update

Verde 2 → SP’s → SP’s → SP’s → ...

DigiTool 3 → SP’s → SP’s → SP’s → ...
Thank you and have a great conference!

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