



Aleph Product Update

ELUNA 2022

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Agenda

- Aleph Roadmap
- Aleph 23.4 highlights
- Aleph 24.0 highlights
- Plans for 24.1 and beyond



Aleph Roadmap – Updated

- V23.3 – Minor Release
 - Available – June 3, 2019
- V23.4 – Minor Release
 - Available – January 2021
- V24.0 – Major Release
 - Planned – July 2022
- V24.1 – Minor Release
 - Planned – December 2023
- V24.2 – Minor Release
 - Planned – July 2025

NERS
enhancements



Aleph V23.4 Highlights (Released January 2021)

Enhancements V23.4

- Circ - barcode scanning for reading room loans - add missing functionality
- Delete Item Records (p-item-11) - add option to use STA field for BIB record management
- Expanding ORCID from authority records to source record
- Check routine needed to identify records that exceed size limits

Circ - barcode scanning for reading room loans

- Enhance the 'GUI-Circulation-Reading list loans list' so that user will be able to simultaneously moved to the item AND update the item's location from 'Reading Room' to 'On shelf' and vice versa

Circ - barcode scanning for reading room loans

- Background

- Aleph 'GUI-Circulation-Reading Room Loans List' functionality provides an easy way to navigate between the listed items.
- However, this functionality doesn't suffice when handling a massive amount of items that need (on a daily/hourly base) to be moved from 'Shelf' to 'Reading Room' and vice versa

Circ - barcode scanning for reading room loans

- Business Requirements

- *Scanning and highlighting is implemented but moving the item is not*
- *Currently, you just jump to the item in the list by scanning the barcode, and then have to click the appropriate button to move the item*
- *Wish for the item to be highlighted and then moved without having to press any button*
 - *If the item is in reading room, scanning the barcode would move it automatically to the shelf*
 - *if the item is on shelf, scanning the barcode would move it to the reading room selected in the drop-down menu*
- *Moving items between the reading room and the shelf and vice versa stands for about 70% of all our circulation transactions, so this would be a huge time saver and also make the workflow easier. Not to mention the ergonomic benefits*

Circ - barcode scanning for reading room loans

- Solution Description

- a new GUI-Circulation flag will control the functionality of the 'Jump to Barcode' action in the patron's list of reading room loans
- Upon setting-up the flag, the 'Jump to Barcode' action will include both activities:
 - the relevant item will be highlighted (already supported)
 - the item will be marked as 'Reading Room' or 'On Shelf' ; the opposite to its current status (new functionality)

Circ - barcode scanning for reading room loans

- A new flag will be set in the PC file: **./circ/tab/circ.ini**
 - **Flag section:** [ReadingRoom] - new section
 - **Flag name:** AutoMoveItem - new flag
 - **Possible value:** Y/N
- N = (default) Retain current functionality in which 'Jump to barcode' detects and highlights the relevant line in the list
- Y = New functionality. The 'Jump to barcode' action detects the relevant line and change it from 'On shelf' to 'Reading Room' and vice versa

Circ - barcode scanning for reading room loans

List of Reading Room Loans

RR Sublibrary: HLR

Jump to Barcode:

Barcode	Title	Date	Due Date	RR	Call no
848686	Lady Gaga :	20/08/19	17/09/19	✓	ML420.L185 364
7547-150	Journal of the Royal Musical Association.	21/08/19	17/09/19	✓	M102 .J47
32044000071199	Shi ni chun chun chun wen hui =	21/08/19	17/09/19		ML420.L185 364
32044019321843	The Chinese recorder and missionary journal.	21/08/19	17/09/19		Ch 2.3.13

Sample of item 7547-150 BEFORE barcode is scanned --> The item is currently located in the reading room

Shelf <-
-> RR
Item
Print
Barcode

List of Reading Room Loans

RR Sublibrary: HLR

Jump to Barcode:

Barcode	Title	Date	Due Date	RR	Call no
848686	Lady Gaga :	20/08/19	17/09/19	✓	ML420.L185 364
7547-150	Journal of the Royal Musical Association.	21/08/19	17/09/19		M102 .J47
32044000071199	Shi ni chun chun chun wen hui =	21/08/19	17/09/19		ML420.L185 364
32044019321843	The Chinese recorder and missionary journal.	21/08/19	17/09/19		Ch 2.3.13

The new functionality:
Sample of item 7547-150 AFTER barcode is scanned --> the item is moved back to the shelf

Shelf <-
-> RR
Item
Print
Barcode

Delete Item Records (p-item-11) - add option to use STA field for BIB record management

- There is a need to enhance the way bibliographic and holding records are managed by the 'Delete items records (item-11)' service.
- Need to retain the content of the deleted records and set the relevant value in the status (STA) field.

Delete Item Records (p-item-11) - add option to use STA field for BIB record management

- Background

- As part of the 'Delete Items Records (item-11)' functionality, Aleph enables deleting Bibliographic records for which all items are deleted
- The current delete action of item-11 is similar to the online action (GUI-Cataloging-Delete from server)
- It removes most of the contents of the Bibliographic records (e.g. title, author, ISBN, identifiers, etc.) and add DEL=Y field
- This situation is problematic when there is a need to inform a third-party utility that record is deleted from the catalog

Delete Item Records (p-item-11) - add option to use STA field for BIB record management

- **Required Functionality:**

- 'Delete Items Records (item-11)' service should be enhanced to :
 - retain the content of the deleted record
AND
 - update the STA field (rather than DEL field)

Delete Item Records (p-item-11) - add option to use STA field for BIB record management

Solution Description

- 'Delete Items Records (item-11)' service will be enhanced with a new 'Record Management' option: Update STA Field
- The 'Update STA Field' will offer a new functionality for marking the bibliographic and holding records as 'deleted' (using the Aleph STA field rather than Aleph DEL field)
- The new functionality will retain the bibliographic and holding data of the deleted record.
- Retaining the data will enable to inform third-party systems about withdrawn inventory

Delete Item Records (p-item-11) - add option to use STA field for BIB record management

Delete Item Records (item-11) - USM50

* Input File Name: delete_item

* Items Report File Name: item_11_report

* Notices File Name: item_11_notice

Override

- Hold Requests
- Bookings
- Photocopy Requests

Update Database

- Yes
- No

Deleted Report Format: 00

Not Deleted Report Format: 00

Letter format: 00

Record Management

- None
- Delete
- Update STA Field **New option**

Runtime: Today

At: [] O'clock:

Library: USM50

Print ID: []

Report Language: []

Submit

View History

Cancel

Help

Add to History

Online

Delete Item Records (p-item-11) - add option to use STA field for BIB record management

<i>Leader</i>	<u>LDR</u>	— —	00000das^^2200685^^^4500
<i>Date and Time</i>	<u>005</u>	— —	20190911145605.0
<i>Deleted</i>	<u>DEL</u>	— <u>a</u>	Y

Sample of a BIB record deleted as a result of activating item-11 with "Delete" mode (current func.)

LDR - field is kept. Position 05 is set to "d" (deleted)

005 - timestamp is updated

DEL - new field is added **DEL\$\$aY**

Delete Item Records (p-item-11) - add option to use STA field for BIB record management

<i>Leader</i>	<u>LDR</u>	—	—	00000nas^^2200685^^^4500
<i>Control No.</i>	<u>001</u>	—	—	000000814
<i>Date and Time</i>	<u>005</u>	—	—	20191003161236.0
<i>Fixed Data</i>	<u>008</u>	—	—	750727c19069999nyumn1p^^^^^^^0^^^a0eng^d
<i>LC Control No.</i>	<u>010</u>	—	a	a^^43002181^//r872
<i>Nat.Bib. Cno.</i>	<u>016</u>	7	a	A30075000
			2	DNLM
<i>ISSN</i>	<u>022</u>	0	a	0003-276X
<i>System No.</i>	<u>035</u>	0	a	(OCoLC)01481086
<i>LCC No.</i>	<u>050</u>	00	a	QL801
			b	.A45
<i>Dewey No.</i>	<u>082</u>	—	a	611.05
<i>Abbrev. Title</i>	<u>210</u>	0	a	Anat. rec.
<i>Key Title</i>	<u>222</u>	4	a	The Anatomical record
<i>Main Title</i>	<u>245</u>	04	a	The Anatomical record.
<i>Imprint</i>	<u>260</u>	—	a	[New York, etc.] :
			b	A. R. Liss [etc.].
<i>A.E. Related To</i>	<u>740</u>	0	5	med
			a	Anatomical record (Online)
<i>Owner</i>	<u>OWN</u>	—	a	HYI
<i>Status</i>	<u>STA</u>	—	a	DELETED

Sample of a BIB record deleted as a result of activating item-11 with 'Update STA Field' mode (new func.)

- record's content is kept
- new STA\$\$aDELETED is added
- 005 time tamp is updated

Expanding ORCID from authority records to source record

- expand the published data with the ORCID (driven from the related Authority record)
- Will allow the user to search, retrieve and display the ORCID when using Primo, OPAC, other discovery tool

Expanding ORCID from authority records to source record

- Background

- Most personal names are not unique, they can change (such as with marriage), have cultural differences in name order, contain inconsistent use of first-name abbreviations and employ different writing systems
- The ORCID (Open Researcher and Contributor ID) is an alphanumeric code to uniquely identify scientific and other academic authors and contributors
- ORCID provides a persistent identity for humans, similar to that created for content-related entities on digital networks by digital object identifiers (source: <https://en.wikipedia.org/wiki/ORCID>)

Expanding ORCID from authority records to source record

- Aleph doc_expand mechanism provides the ability to enrich data with additional information coming from the related Authority records.
- Expanding the ORCID, from the Authority record to the Bibliographic record, will enhance the data retrieve and display functionality; especially when using a discovery tool such as Primo, OPAC, etc.
- It is required to enhance the expand from authority functionality to include the ORCID (set in tag 024 of the authority record).
- It should be implemented similarly to the current "expand from authority programs" (expand_doc_bib_accref*)

Expanding ORCID from authority records to source record

- **Solution Description**

- To address the requirement, the current expand routine *expand_doc_bib_accref* will be enhanced by a new parameter that provides the functionality of expanding the bibliographic data with ORCID driven from the related Authority record.

Expanding ORCID from authority records to source record

- Setting-up the New Parameter
 - The current expand routine `expand_doc_bib_accref` will be enhanced to apply a new parameter set in the 3rd column of the table: `./<xxx01>/tab/tab_exapnd`

```
!      1      2      3
!!!!!!!-!!!!!!-!!!!!!-!!!!!!-!!!!!!-!!!!!!>
PRIMO-FULL expand_doc_bib_loc_usm
PRIMO-FULL expand_doc_type          tab type config  the new orcid parameter
PRIMO-FULL expand_doc_bib_accref    orcid             for expand_doc_bib_accref
```

- The above shows setting up the orcid parameter for PRIMO-FULL expand menu

Expanding ORCID from authority records to source record

Output:

Case description	BIB Data	Related AUTH data	Expanded BIB data (new functionality)
Classic case: BIB has 100 tag with related AUTH record The related AUT record contains a single 024 field The 024 has \$2orcid	100 \$pBacouel-Jentjens, Sabine \$d1967- \$9(DE-588)171594452	024 \$a0000-0002-5951-1679 \$vcg_orcid \$2orcid	100 \$pBacouel-Jentjens, Sabine \$d1967- \$9(DE-588)171594452 \$OORCID: 0000-0002-5951-1679

Check routine needed to identify records that exceed size limit

- Provide an efficient tool for identifying records that exceed size limit

Check routine needed to identify records that exceed size limit

- Aleph provides several flows for loading BIB/AUTH/HOL records from various sources
- Before the load, the user is expected to perform checks of the incoming data to identify potential inconsistencies
- Providing a new check program, that alerts in case a record exceeds its size limit, will facilitate the flow so that relevant actions will take place before the actual load.

Check routine needed to identify records that exceed size limit

Background:

- Any BIB/AUTH/HOL record in Aleph is limited to:
 - Total number of **bytes** for the whole record: 45000
 - Total number of **bytes** for each field: 2000
 - Total number of **subfields** for the whole record: 5000
- **Current functionality**
 - There are cases in which data that is loaded into Aleph exceeds the size limitation
 - In such cases Aleph might shorten the record or load it as is. Either way causes data corruption, interrupts the load action, crashes indexing, etc.

Check routine needed to identify records that exceed size limit

- **Requirement:**

- Provide a new check program, that alerts in case a record exceeds the its size limit.
- Will enable the checks to be done before the actual load.
- The new check programs will identify BIB/AUTH/HOL records that exceed the Aleph record's size limitation
- This new program will be applied at the stage of checking the records (e.g. using manage-25 service) before the actual load (e.g. using manage-18 service). This way, the load and all subsequent actions will not be interrupted by records that exceed the size limitation.

Check routine needed to identify records that exceed size limit

- Solution Description

- The 'check doc' mechanism will be enhanced by a new program that checks the record's size limitation
- New alerts will be added to inform clear message/s related to the record's size limitation
- User will be able to review the alerts and amend the records that exceed the size limitation
- There will be no change in the way data is loaded into Aleph

Check routine needed to identify records that exceed size limit

- **Setting-up the new check_doc_size program**

- **Can be set in:** check_doc configuration table of BIB/HOL/AUTH libraries (check_doc configuration table already exist)
- **Deployment:** User that will be interested in this feature will set *check_doc_size* at the relevant check routine.
- **Example:** Setting up the new program in the BIB directory (./usm01/tab/check_doc). This will activate the new program whenever P-MANAGE-25 check routine is applied.

```
P-MANAGE-25      check_doc_tag_text
P-MANAGE-25      check_doc_line
P-MANAGE-25      check_doc_line_contents
P-MANAGE-25      check_doc_lkr
P-MANAGE-25      check_doc_doc
P-MANAGE-25      check_doc_size      The new check_doc program
```

Check routine needed to identify records that exceed size limit

- **Activating the new check program**

- In reference to above Example set-up:
 - Upon activating 'Fix and Check Catalog Records (manage-25)', the new check program will be included as part of P-MANAGE-25 check routine
 - There will be no change in the service interface form nor data flow
 - This enhancement will provide the ability to check the record size and provide clear messages in case size limit is exceeded

Check routine needed to identify records that exceed size limit

Fix and Check Catalog Records (manage-25) - USM01

Input File:

Output File for Fixed and Checked Records:

Output File for Rejected Records:

From Document Number (up to 9 digits):

To Document Number (up to 9 digits):

* Fix Routine:

* Check Routine:

* Reject Based on Forbidden Errors Only: Yes No

Runtime:

At: O'clock:

Library:

Submit
View History
Cancel
Help
 Add to History
 Read From/PrintToADM

Check routine needed to identify records that exceed size limit

- The new messages for the new check program
 - New messages will be added to the check_doc mechanism
 - These messages will provide clear notices as part of the manage-25 output files OR any other flow from which check_doc_size is activated
 - Similar to all other check_doc messages, users that will be interested in this feature, will configure whether the alerts are marked as 'Mandatory' (critical) OR 'Warning'``

Infrastructure Changes in V23.4

- End support for Solaris



Aleph V24.0/24.1/24.2 Plan

Aleph V24.0/24.1/24.2 Plan

- Validation checks across fields - create dependencies for subfields across two or more fields – V24.0
- Fiscal Year Purge - remove all vendors without any remaining orders or invoices
- Prompt for confirmation before deleting memos – V24.0

Prompt for confirmation before deleting triggers

- Current Aleph GUI 'Trigger List' interface doesn't provide an alert when user activate the 'Delete' trigger action
- Once 'Delete' is pressed, the trigger is immediately deleted without any recovery option
- Having a confirmation message before deletion will attract the user's attention and avoid redundant deletion.

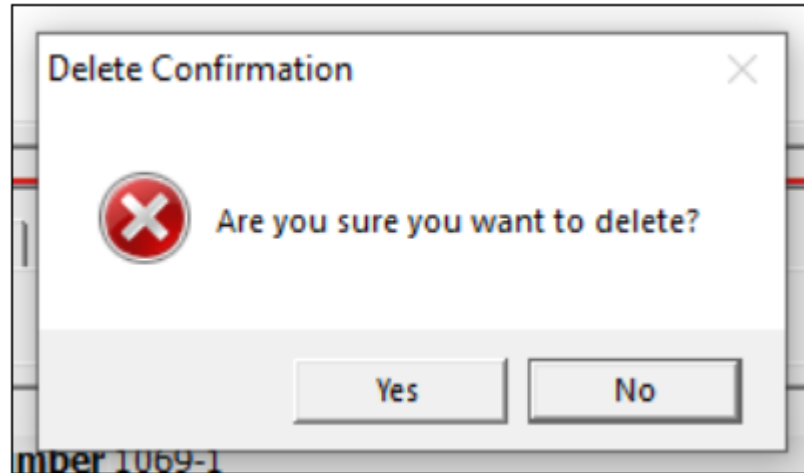
Prompt for confirmation before deleting triggers

- **Solution Description**

- The user's flows for trigger deletion will be enhanced with an additional confirmation message before the delete is executed
- This change will be implemented for all GUI users without any special customization nor setup
- It will cover the three on-line triggers that offer the 'Delete'

Prompt for confirmation before deleting triggers

- A new pop-up message will appear when the 'Delete' action will be activated by the user via GUI-Triggers List:



Prompt for confirmation before deleting triggers

- The default selected option will be 'No'
- The user will have to explicitly press the 'Yes' option in order to submit the deletion
- The delete action will be executed AFTER the user's confirmation

Prompt for confirmation before deleting triggers

- Triggers to be covered
 - *GUI Cataloging/Acquisitions-Serials/Circulation - Trigger List (for a specific record)*
 - *GUI Cataloging - Trigger List (for all records)*
 - *GUI Cataloging - Edit Actions menu - Record's Triggers - Trigger List (for a specific record)*

Validation checks across fields

- Current Aleph check_doc validation mechanism, provides the functionality of checking dependencies for subfields within the same field.
- There is no way to define dependencies across fields (check_doc_line and check_doc_doc)
- Improving the check_doc functionality to include validation checks across fields, will assist the catalogers when editing a record and improve the quality of the records.

Validation checks across fields

- A new check_doc program will be added to create dependencies across fields: check_doc_across_fields
- This will allow checking a BIB/AUTH record based on data cataloged in subfields of different fields (within the same record)
- Library will configure the relevant dependencies
- New messages (errors) will be added to reflect the detected inconsistencies
- Will impact cataloging and related services that use 'check doc'

Validation checks across fields

- Setting-up the new check program in check_doc (Example)
 - Table location: ./usm01/tab/check_doc (already exists)
 - Col.1: CATALOG-INSERT -check will be activated when a cataloging record is saved, updated or when the 'Check Record' option is selected from the Cataloging module (already exists)
 - Col.2: The check program: check_doc_across_fields (new functionality)

```
!          1          2          3
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!>
CATALOG-INSERT      check_doc_line
CATALOG-INSERT      check_doc_across_fields
CATALOG-INSERT      check_doc_new_acc
CATALOG-INSERT      check_doc_new_acc_aut
CATALOG-INSERT      check_doc_unique_index
CATALOG-INSERT      check_doc_tag_text
CATALOG-INSERT      check_doc_line_contents
CATALOG-INSERT      check_doc_line
```

Setting-up the new check program in check_doc table

Validation checks across fields

- Setting-up the new table: `check_doc_across_fields`
 - A new `$data_tab/check_doc_across_fields` table will define the rules of checking content of subfields across fields.
 - The table will enable to define the rules for checking content dependencies among subfields of different fields
 - Following is a sample table in the demo BIB library: `./usm01/tab/check_doc_across`

Validation checks across fields

```
!                               check_doc_across_fields
!Check of dependencies between subfields content of different fields
!=====
! Last header change: 26/10/2021
!                               The new table: check_doc_across_fields
! HELP
!
! This table enables you to determine the rules for checking contents dependencies
! among subfields of different fields.
!
! col. 1      Record format as in the FMT field. Use XX for all formats.
! col. 2      tag+indicator
! col. 3      first subfield code
! col. 4      content of first subfield (30 char.)
! col. 5      type of dependency: Y- present; N - cannot be present
! col. 6      second tag+indicator
! col. 7      second subfield code
! col. 8      content of the second subfield (30 char.)
!
!1  2  3              4              5  6  7              8
!!-!!!!-!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-!-!!!!-!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
XX 949## a abc              Y 960## d xy
XX 949## a abc              Y 967## d xy
XX 949## a hij              Y 968## c klm
```

Validation checks across fields

- The rules may be defined per record format (col.1) . For example books (BK) might have different logic than serials (SE). The code XX can be set for all formats
- Col. 2 thru 4 set the 1st tag+indicator+subfield+content that should be checked against the 2nd set
- Col. 6 thru 8 set the 2nd tag+indicator+subfield+content that should be checked against the 1st set
- Col. 5 will set the type of dependency:
 - Y = the defined content should be presented in the other set
 - N = the defined content cannot be presented in the other set

Validation checks across fields

- The New Block/Warning Message

- A new error text will be added to ./error_<lng>/check_doc file (file already exists)
- **Error number:** 0232 (hard-code;' cannot be changed by the library)
- **Error text:** Error found upon dependency check between the content of the subfields "\$1" and "\$2"
- \$1 - the place holder for the tag: (field+indicator+subfield) of the 1st field (col. 2 and 3 of check_doc_across_fields table)
- \$2 - the place holder for the tag: (field+indicator+subfield) of the 2nd field (col. 6 and 7 of check_doc_across_fields table)

Validation checks across fields

```
1009 L 901 - Missing system counter for library $1.
1010 L 901 - The counter $2 for library $1 is already attributed to doc number $3. Check system
1011 L 901 - You are not allowed to add more than 10 inventory numbers at a time.
!
! check_doc_across_fields
0232 L Error found upon dependency check between the content of the subfields "$1" and "$2"
!
! check_doc_call_no_090 )The new error #0232 in ./error_<lng>/check_doc
1100 L ($1$$a): Call number prefix $2 is a new entry.
1101 L ($1$$a): Call number prefix $2 is a new entry, with manual input of the sequence=$3 !
1102 L ($1$$a): Call number prefix $2 is a old entry, with manual input of the sequence=$3 !
1105 L ($1$$a): Error, Call number prefix $2 is an old entry, but maximum for sequence reached;
ling !
```

Validation checks across fields

- Setting the New Check as a Block or Warning
 - As in any other record checks, the library should define the the new check as a Warning (T) or Mandatory (M).
 - T = error which writes a cataloging trigger record, but allows database update.
 - M = error which does not allow database update.
 - This can be done by adding the new entry to \$data_tab/check_doc_mandatory (table already exists)

Validation checks across fields

Clipboard image tools shapes Colors

SE System No. 500 Waseda hōgaku = () Year: 1922

Barcode

[R] Edit Records
USM01-500 (NEW010.MRC)
[I] Import Records
[T] Triggers

USM01 - 500
OBJECTS (No record available)
USM60
HOL - 50061 STA () [50061]
USM50 - 238710
USM51 (No record available)

Leader LDR — 01195cas^^2200361^a^4500
Control No. 001 — 000000500-2
Date and Time 005 — 20031024151229.0
Fixed Data 008 — 830520c19229999ja^qx^p^^^g^^^0uu1^0jp
LC Control No. 010 — a sn^89026301^/V/r93
ISSN
System No.
Catal. Source

Language Code

Authent. Code
Geog. Area Code
Abbrev. Title
Key Title
Main Title

Varying Title

1. Messages 2. Tag Information

Record Check Warnings/Errors

Doc Validation Error		Override
?	008/30: obsolete value u.	
?	008/31: obsolete value u.	
?	008/32: obsolete value 1.	
?	First indicator in tag "035" is not valid.	
?	First indicator in tag "222" is not valid.	
?	Error found upon dependency check between the content of the subfields "949 a" and "960 d"	

The new error in GUI-Catalog, when a record is saved

Cancel Help

Infrastructure Changes in V24.0

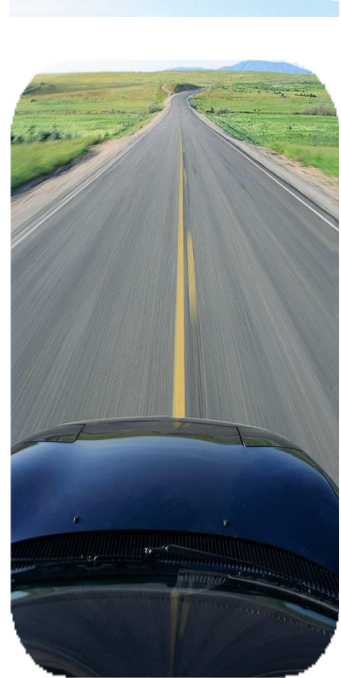
- RedHat8



Plans for V25 and Beyond

Plans for V25 and Future Versions

- Items for consideration:
 - User group enhancements (NERS)
 - Extending support for protocols and standards such as NCIP, SIP2, RFID, EDI
 - Infrastructure SW/HW certifications



Thank you!

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