



Aleph Update

**ELUNA 2104
Montreal Canada**

May 2014

**Carmit Marcus
Director of Product Management and
Partnerships**


The bridge to knowledge

Agenda

- Aleph today
- Aleph roadmap
- V22.1 highlights

Agenda

- Aleph today
- Aleph roadmap
- V22 highlights

Aleph today

- 2609 institutions worldwide
- Current version – V22

Agenda

- Aleph today
- Aleph roadmap
- V22 highlights

Aleph Roadmap

- V21.0 – Major Release
 - Available – January 2012
- V21.1 – Minor Release
 - Available - December 2013
- V22.0 – Major Release
 - Available – January 2014
- V22.1 – Minor Release
 - Planned – mid 2015 (*)
- V23.0 – Major Release
 - Planned – January 2017 (*)

(*) – under discussions

Agenda

- Aleph today
- Aleph roadmap
- V22.1 highlights

User Groups initiated enhancements

Publishing Daemon - Performance improvement

- Improving the performance of the publishing daemon job ue_21
- When a large file of bibliographic data is loaded into Aleph, the publishing daemon need handle large amount of data.
- It takes sometimes several days for the publishing daemon to handle all the new or modified records
- Adding the ability to run the daemon job in several parallel processes will enable to improve scalability and reduce the backlog

Publishing Daemon - Performance improvement

- In order to improve the performance of the publishing daemon job (ue_21), a new parameter - number_ue_21_processes, will be introduced
- The new parameter will enable to divide the running of the job into several processes (up to 9) to be run in parallel
- The variable can be set in aleph_start OR in prof_library file of the publishing library
- Each process will have its own log file

Display URI Links in Auth records as active links when Viewing in BIB Library

- A lot of AUT records include URI (Uniform Resource Identifier) information in subfield u of various tags. For example: 856, 670, 678
- Current Aleph functionality enables displaying the URI field of an AUT record as an active link only when viewing the record in the authority library
- For example - when browsing for heading in an AUT xxx10 library, the URI is displayed as a link.
- However, when browsing in a Bibliographic Library and clicking the associated AUT Record link, the URI field is displayed as a plain text (rather than a link)
- Displaying the AUT record's URI as a link, when accessing via the BIB library, will improve the service for the users

Display URI Links in Auth records as active links when Viewing in BIB Library

- In order to display URI, of an AUT record, as a link, when accessing via the BIB library, a new option will be added to column 10 of the BIB library's table: `edit_doc_999_aut_<library>.lng`

Display URI Links in Auth records as active links when Viewing in BIB Library

- New Setup in `edit_doc_999_aut_<library>.lng` (e.g. `edit_doc_999_aut_xxx10.lng`)
 - Current functionality:
 - In Web OPAC, clicking on the *Authority Record* reference allows the display of the linked AUT record
 - The BIB library table, `edit_doc_999_aut_xxx10.lng`, defines the display of AUT records for cross- reference display. Column 10 defines the displayed link type. There is no option for electronic resource link

Display URI Links in Auth records as active links when Viewing in BIB Library

- New Setup in `edit_doc_999_aut_<library>.lng` (e.g. `edit_doc_999_aut_xxx10.lng`)
 - Enhanced functionality:
 - A new type, M, will be introduced in column 10 of `edit_doc_999_aut_xxx10.lng`
 - It will provide the option to display subfield u as an URI link
 - Type M will function similar to current type M option in column 10 of `edit_doc_999.lng`:

Display URI Links in Auth records as active links when Viewing in BIB Library

- **Displaying the URI Link in OPAC** – the new setup will result displaying the content of subfield u as an external link:

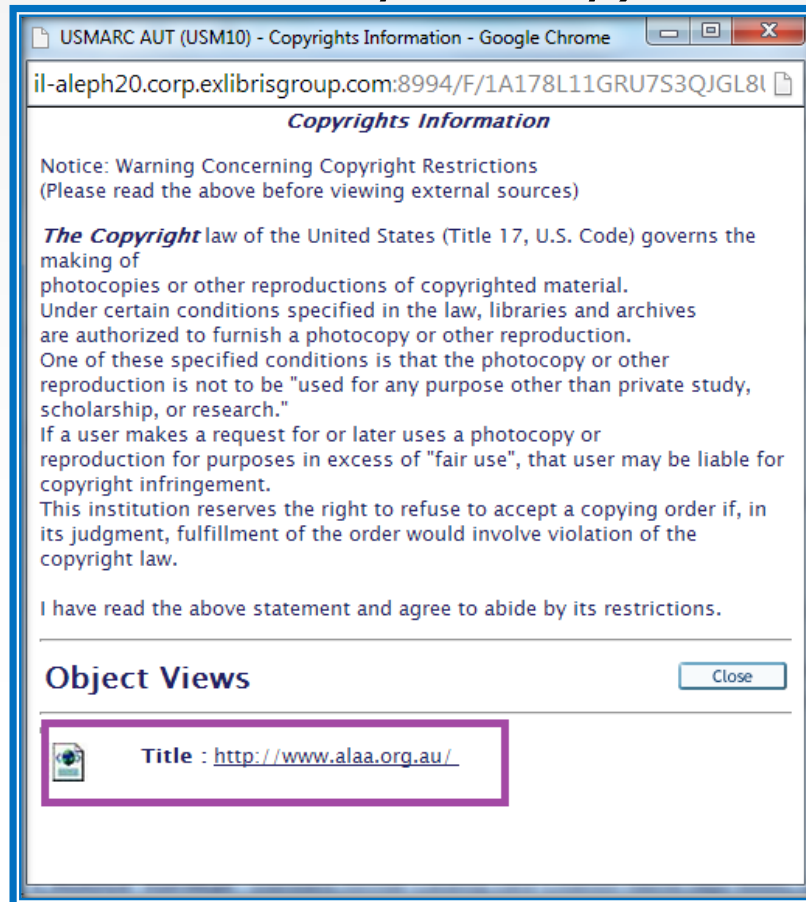
Cross-references – Authors – Applied Linguistics Association of Australia.

Click on the tag in the left column to jump to this heading in the Browse List.
Click on an underlined heading to create a set of records related to it.
Click on the browser's back button to return to your place in the Browse List.

Sys. no.	000014721
<u>Heading</u>	<u>Applied Linguistics Association of Australia.</u>
Electr. Resource	<u>http://www.alaa.org.au/</u>
<u>Seen from</u>	ALAA
Update Flag	Y

Display URI Links in Auth records as active links when Viewing in BIB Library

- Upon clicking the external link, the Copyright Information screen will pop-up containing the URI link (similar to current behavior when viewing the record in the authority library):



Display URI Links in Auth records as active links when Viewing in BIB Library

- This link will provide an access to the relevant site:



 **Applied Linguistics Association of Australia**

[Home](#) [Office holders](#) [ARAL \(Journal\)](#) [Membership](#) [Scholarships and prizes](#) [News and conferences](#)

The Applied Linguistics Association of Australia (ALAA) is the national organisation for applied linguistics in Australia. ALAA aims to provide leadership in applied linguistics and supports the development of teaching, learning and research in the field. ALAA includes national and international members and is affiliated with the Association Internationale de Linguistique Appliquée (AILA).

2013 M.A.K Halliday Scholarship

AILA World Congress 2014 - Brisbane

'One World, Many Languages'

In 2014, the AILA World Congress will be held in Brisbane  [AILA 2014.pdf \(106.25 KB\)](#). We encourage all members to register their interest and receive regular updates at the AILA website: <http://www.aila2014.com/>

 **AILA World Congress 2014**
10-15 August 2014 | Brisbane Australia
One World | Many Languages

Barcode Scanning for Reading-Room Loans

- Detecting a specific item barcode in the list of the Reading Room loans
- Wish to be able to move loaned items from shelf to the reading room and vice versa by scanning the barcode
- Today this is not possible, you have to manually select the item to be moved and then click on the appropriate button
- Some patrons have many loans so the list of loans can be very long making it difficult, time consuming and error prone to manually select the correct item(s).
- Scanning the barcode would make the procedure easier, safer and faster

Barcode Scanning for Reading-Room Loans

- In order to allow jumping to a particular item in the list, a new option, "Jump to Barcode", will be added to GUI-Circulation-List of Reading Room Loans

List of Reading Room Loans

RR Sublibrary: HILR

Jump to Barcode: 1001-10

Barcode	Title	Author	Loan Date	Loan Hour	Due Date	Due Hour	RR	Call no
32044012549796	Philosophical transactions of the Royal Society of London		24/02/14	08:49	24/02/14	09:00	✓	LSoc 1816.12
696-1	Journal of the American Chemical Society.	American Chemical Society.	24/02/14	09:27	24/03/14	23:59	✓	12.544.AS
238733-10	Annual review of ecology and systematics.		24/02/14	09:32	24/03/14	23:59		
32044050672286	Cognitive psychology.		24/02/14	10:22	24/03/14	23:59		Phil 12.130
32044011781671	Cognitive psychology.		24/02/14	15:15	24/03/14	23:59		Phil 12.130
1000-40	Experimental and molecular pathology.		24/02/14	15:18	24/03/14	23:59		
1001-10	Experimental cell research.		24/02/14	15:23	24/03/14	23:59	✓	P5414
1001-20	Experimental cell research.		24/02/14	15:23	24/03/14	23:59		P5414
696-6	Journal of the American Chemical Society.	American Chemical Society.	24/02/14	15:37	24/03/14	23:59		KL.152.22
32044014198899	Cognitive psychology.		24/02/14	15:56	24/03/14	23:59		Phil 12.130

Shelf <-

-> RR

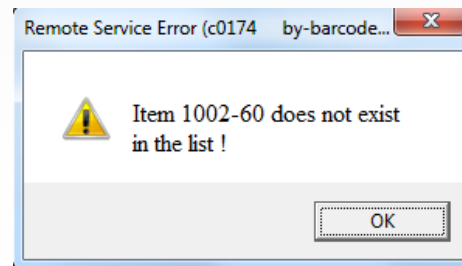
Item

Print

Barcode

Barcode Scanning for Reading-Room Loans

- The user will type/scan the item barcode into the edit-box field
- If item found: the system will highlight the line of the requested item barcode. The 'Jump to Barcode' field will be cleared-out.
- If item not found: The highlight line will not be changed. The 'Jump to Barcode' field will be cleared-out and a pop-up message will appear: Item <item-barcode> does not exist in the list !



Barcode Scanning for Reading-Room Loans

- Upon exiting and re-entering the Reading-Room Loans list; the first line of the list will be highlighted (same functionality as is today). The cursor will be positioned at the 'Jump to Barcode' edit box

Hold Shelf Reminder Letters

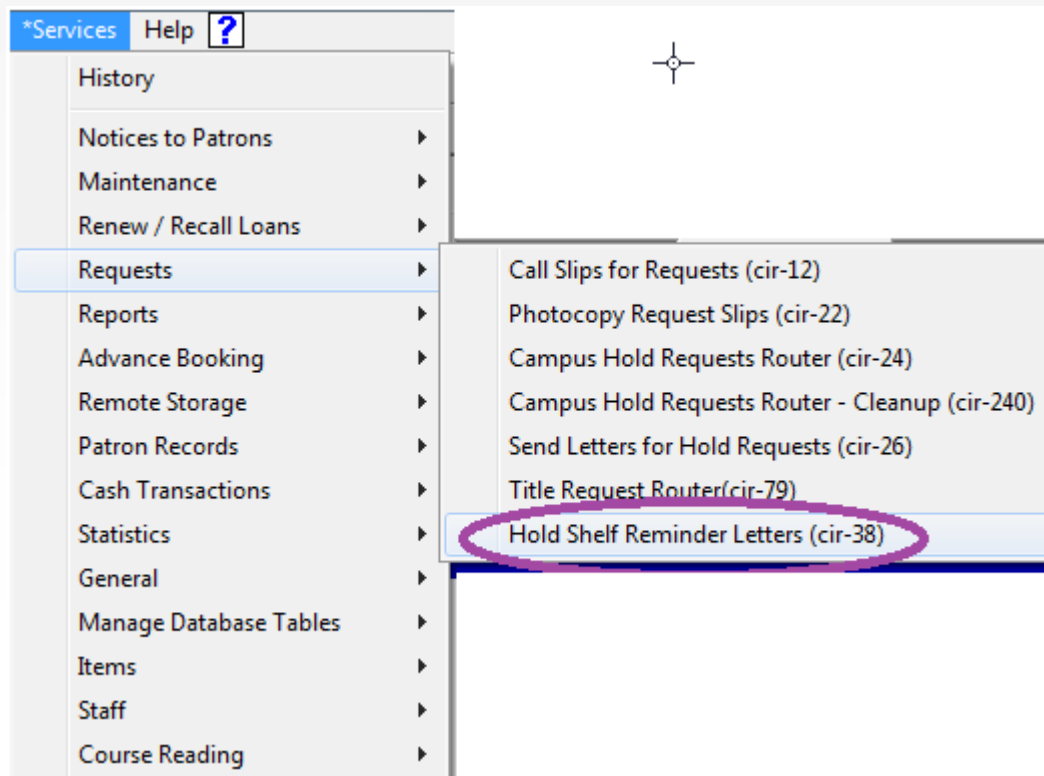
- Produce Hold Shelf reminder letters for hold requests which are not yet picked by the patrons.
- When hold requests are filled and placed on hold shelf, a letter is sent to the patron asking him to come and pick the requested material.
- Enhancing Aleph to produce additional letter/s (reminder) in case material is not picked up will streamline the hold request handling and circulation services

Hold Shelf Reminder Letters

- A new circulation batch service will be introduced: Hold Shelf Reminder Letters (cir-38).
- The service will enable sending additional letter/s to a patron, informing of a request which is not yet picked up (although a notification was sent when the item was placed on Hold Shelf) and providing another chance to get the requested material before it is returned to stack.

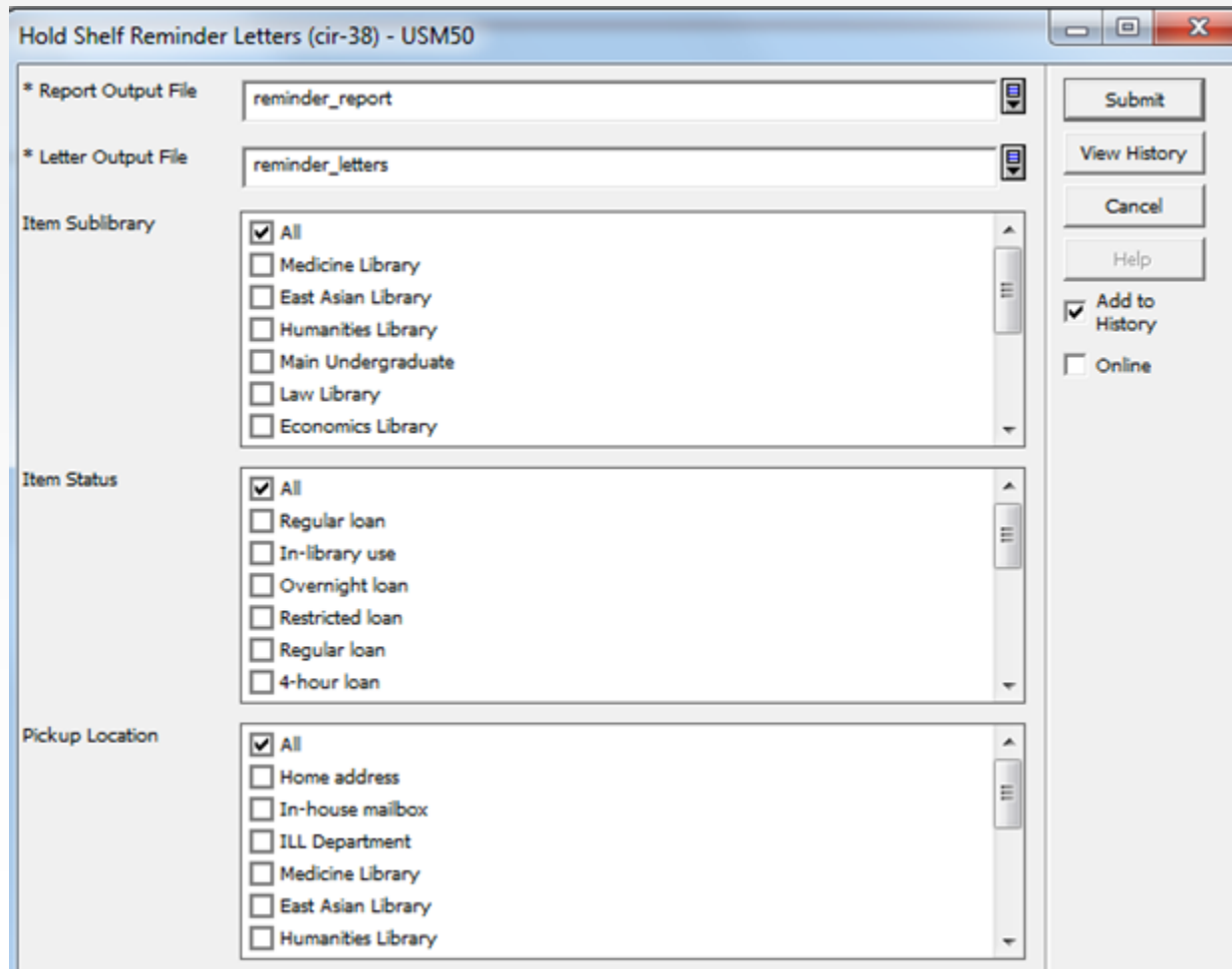
Hold Shelf Reminder Letters

- **New Batch Service - Interface**
 - The new batch service, “Hold Shelf Reminder Letters (cir-38)” will be accessed via GUI-Circulation-Services-Requests:



Hold Shelf Reminder Letters

- The service form:



Hold Shelf Reminder Letters (cir-38) - USM50

* Report Output File: reminder_report

* Letter Output File: reminder_letters

Item Sublibrary

- All
- Medicine Library
- East Asian Library
- Humanities Library
- Main Undergraduate
- Law Library
- Economics Library

Item Status

- All
- Regular loan
- In-library use
- Overnight loan
- Restricted loan
- Regular loan
- 4-hour loan

Pickup Location

- All
- Home address
- In-house mailbox
- ILL Department
- Medicine Library
- East Asian Library
- Humanities Library

Submit

View History

Cancel

Help

Add to History

Online

Hold Shelf Reminder Letters

- The service form (cont.):

Number of Days Since Last Letter	<input type="text" value="10"/>
Sort Report By	<input type="text" value="Title"/>
* Report Format	<input type="text" value="Standard report"/>
* Letter Format	<input type="text" value="Standard pickup letter"/>
Runtime:	<input type="text" value="Today"/>
At:	<input type="text"/> O'clock:
Library:	<input type="text" value="USMS0"/>
Print ID:	<input type="text"/>
Report Language:	<input type="text"/>

Hold Shelf Reminder Letters

- The batch will include hold requests (Z37) which match **all** of the following criteria:
 - Requests which are currently on hold shelf (Z37-STATUS=S).
 - Requests which their pickup letter already sent to patron (Z37-PRINT-STATUS=P).
 - Requests which their hold period include current date (the date in which the batch is executed). The hold period defines the date range in which the item is kept at the hold shelf. (from Z37-HOLD-DATE to Z37- END-HOLD-DATE).
 - Request which match the batch input parameters: Item sublibrary and Item status – Request pickup location, Number of days since last letter (Z37-LETTER-DATE).

Hold Shelf Reminder Letters

- Upon running the batch, the system will trace all hold requests that match the criteria and perform the following:
 - List the requests in the batch output report.
 - Produce pickup letters to patrons.
 - Update the requests' letter date to current date (Z37-LETTER-DATE).

Hold Shelf Reminder Letters

- The batch output report includes information for each retrieved requests. This include: Item info (Z30), Hold request data (Z37), short BIB data (Z13) and Patron Info (Z303).
- The batch will use as default an already existing report template: hold-requests-report.xsl.
- If library wants to have a special report format for cir-38, a new report format can be designed (e.g. hold-requests-report-05.xsl).

Hold Shelf Reminder Letters

- Sample of an output report:

07/01/2014
hold-requests-report-00

Hold Requests Report

Bib Info	Patron ID	Patron Name	Item Barcode	Request Date
try this..	00000012	Aaberg, Oscar	238714-10	05/01/2014
Société verviétoise d'archéologie et d'histoire... Bulletin.. [Dison : Imp. P. Féguenne, 1898-. v. : ill. ; 24- 25 cm..	00000036	Aadland, Dustin	600-220	06/01/2014

Hold Shelf Reminder Letters

- A pickup reminder letter will be produced for each retrieved request.
- This includes information of: Item info (Z30), Hold request data (Z37), short BIB data (Z13) and Patron Info (Z302).
- The batch will use as default an already existing letter template: hold-requests-letter-01.xsl
- If library wants to have a special letter format for cir-38, a new letter format can be designed (e.g. hold-request-letter-01-05.xsl)

Hold Shelf Reminder Letters

- Sample of an output letter:

06/01/2014
hold-request-letter-01-00

Hold Request

Humanities University Libraries
222 Aleph Causeway
Chicago, IL 60614
thechoice@exlibris.co.il
Tel# 773.404.5527

Dustin Aadland
Garden St.
Boston MA 90917 90917

Patron ID: 00000036

Dear Sir/Madam,

The following item, which you requested on 06/01/2014, can be picked up at the Circulation Desk of Law Library:

Note that the item will be held for you until 15/01/2014.

Société verriétoise d'archéologie et d'histoire. :
Bulletin.. [Dison : Imp. P. Féguenne, 1898-. v. : ill. ; 24-25 cm.

Sublibrary: Humanities Library
Collection: General

Sincerely,
Circulation Department

Hold Shelf Reminder Letters

- The batch execution summary (Z100) will include information about the number of hold requests included in the report/letters



1. Batch Job Details		2. Log File	
Job ID:	330		
Job name:	Hold Shelf Reminder Letters (cir-38)		
Start time:	07/01/2014 12:00		
End time:	07/01/2014 12:00		
Status:	Success		
Summary:	Number of requests included: 35		
Job type:	CIRC		
User:	MASTER		
Errors:	No Errors		
Parameters:	USM50,11,,,,N,N,20140107,03,02,00,00,00,,cir_06_claim,Y,		
Log file:	/exlibris/aleph/a22_4/alephe/scratch/usm50_p_cir_06.00020		
Printouts:	/exlibris/aleph/a22_4/usm50/print/11 /exlibris/aleph/a22_4/usm50/print/cir_06_claim		

- A new user privilege will be added

ILL Lending: Enable Request Check-in when No Item is Linked

- The ISO ILL protocol allows for an item to be “Received” while it was never “Shipped”.
- Occasionally ILL lending staff will skip the Ship action of an ILL request.
- The borrowing library can Receive the item and normal updating can occur.
- When the item is sent back to the lending library and the lending staff tries to “Check-in” the item - an error message “Item Record not found” is displayed. The lending staff is unable to complete the request cycle even though they have the item.
- This enhancement would allow ILL lending staff to complete the ILL request cycle and closing the request

ILL Lending: Enable Request Check-in when No Item is Linked

- In order to allow checking-in requests that were never “shipped”, the block message: “No item found for this request” will be replaced by the notification: “No item found for this request. Continue: Yes/No”.
- This will be applied only for ISO ILL requests.

ILL Lending: Enable Request Check-in when No Item is Linked

- **Current Functionality:**
 - ISO ILL messages are sent and received by the ILL partners and enable a mutual updating of the both request statuses (borrowing and lending request).
 - Forgetting to send the “shipped” message when lending library supply the requested material creates a gap in the ILL cycle.

ILL Lending: Enable Request Check-in when No Item is Linked

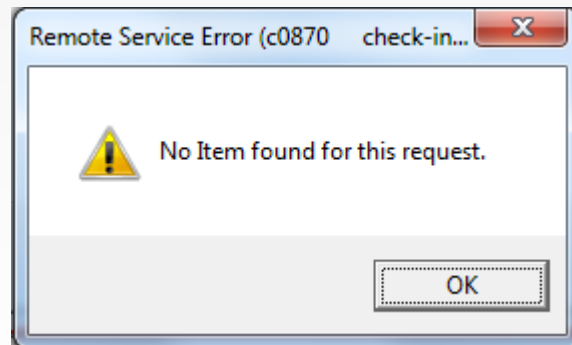
- The request is supplied but without updating the "Supplied Info" which is left empty:

The screenshot displays a web-based form for ILL request management. The form is divided into five tabs: 1. Request Info, 2. Bibliographic Details, 3. Request Details, 4. Items, and 5. Received Messages. The 'Request Details' tab is currently active. The form contains several input fields and dropdown menus. A purple rectangular box highlights the 'Supplied Info' section, which includes the following fields: 'Supplied Media', 'Shipped Barcode', 'Exp. Return Date' (set to 00/00/0000), 'Supply Note', and 'Ship Method'. The 'Supplied Info' section is currently empty, indicating that the request has been supplied but the information has not been updated.

Field	Value
Open Date	31/12/13
Requested Media	Printed (Loan)
Req. Ship Method	
Req. Ship Method Inf	Email
Requester Note	
Requester Email	
Level Of Service	When convenient
Need by Date	20/02/2014
Supplied Media	
Shipped Barcode	
Exp. Return Date	00/00/0000
Supply Note	
Ship Method	

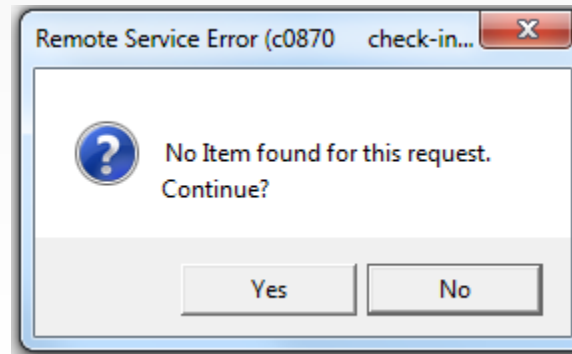
ILL Lending: Enable Request Check-in when No Item is Linked

- When material is returned to the lending library, the system finds that no item is linked to the request (as a result of skipping the “ship” action) and a block message: “No item found for this request” appears.



ILL Lending: Enable Request Check-in when No Item is Linked

- Functionality will be changed so that when checking-in ISO ILL lending request (Z416-PROTOCOL-TYPE=ISO) with no linked item (Z416-ITEM-INFO is null); a new message will appear - "No item found for this request. Continue: Yes/No".



ILL Lending: Enable Request Check-in when No Item is Linked

- The user may select: Yes or No
 - No – (default) This will abort the check-in action. Similar to current block functionality. No data update occurs.
 - Yes – New functionality. Check-in actions are activated. This includes:
 - ISO message is sent to the borrowing library
 - Request status is set to “Closed” with no item associated
 - Action is recorded in the request log

Request cycle is completed. There is no attempt to look for a linked item.

ILL Lending: Enable Request Check-in when No Item is Linked

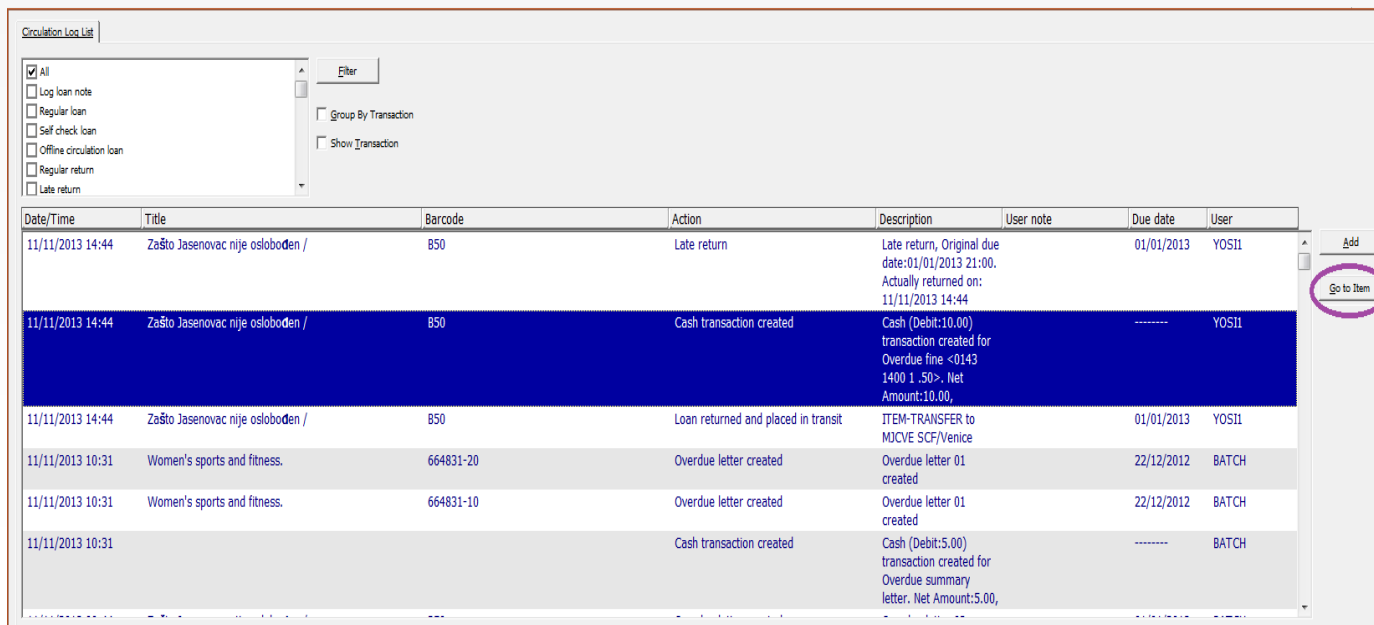
- This functionality will be implemented for “check-in” action activated via the “request-Check-In button” and “bulk Check-In” action.
- Since no item is linked to the request, when activating bulk Check-In, the user will have to enter request number rather than item barcode.
- Non-ISO request flow will remain as is today.

Link from Circulation Log to Items List

- Circulation Log enables maintaining an audit-trail as for patron and item activities.
- When discussing entries with patrons staff users often have to go to the item record for more information. At present this requires copying and pasting barcode information in order to reach the item record.

Link from Circulation Log to Items List

- In order to provide a link from Circulation Log to items list, a new button will be introduced in the Circulation Log interface: Go to Item.
- The new button will be located on the Circulation Log interface:



The screenshot displays the 'Circulation Log List' interface. On the left, there is a filter panel with checkboxes for 'All', 'Log loan note', 'Regular loan', 'Self check loan', 'Offline circulation loan', 'Regular return', and 'Late return'. Below the filter panel is a table with the following columns: Date/Time, Title, Barcode, Action, Description, User note, Due date, and User. The table contains several rows of transaction data. A red circle highlights a 'Go to Item' button located on the right side of the interface, next to the second row of the table.

Date/Time	Title	Barcode	Action	Description	User note	Due date	User
11/11/2013 14:44	Zašto Jasenovac nije oslobođen /	850	Late return	Late return, Original due date:01/01/2013 21:00. Actually returned on: 11/11/2013 14:44		01/01/2013	YOS11
11/11/2013 14:44	Zašto Jasenovac nije oslobođen /	850	Cash transaction created	Cash (Debit:10.00) transaction created for Overdue fine <0143 1400 1.50>. Net Amount:10.00,		-----	YOS11
11/11/2013 14:44	Zašto Jasenovac nije oslobođen /	850	Loan returned and placed in transit	ITEM-TRANSFER to MCV E SCF/Venice		01/01/2013	YOS11
11/11/2013 10:31	Women's sports and fitness.	664831-20	Overdue letter created	Overdue letter 01 created		22/12/2012	BATCH
11/11/2013 10:31	Women's sports and fitness.	664831-10	Overdue letter created	Overdue letter 01 created		22/12/2012	BATCH
11/11/2013 10:31			Cash transaction created	Cash (Debit:5.00) transaction created for Overdue summary letter. Net Amount:5.00,		-----	BATCH

Link from Circulation Log to Items List

- In GUI-Circ there are 2 alternative for accessing the Circulation Log:
 - From Patron tab (records the selected patron activities)
 - From item tab (records the selected item activities)
- The new button will be displayed in both interfaces.
- The 'Go to Item' button will be active for Circulation Log entries which are related to an item. In cases where the circulation log is not related to an item, the button will be disabled (grayed-out).

Link from Circulation Log to Items List

- Upon clicking the new button, the GUI-Circulation-Items List will be opened, focusing on the item which is related to the circulation log.
- The Circulation-Items List will be displayed only for authorized staff users. The current staff user privilege is required: Circulation-Items Management-Items List.

Item History List

- Aleph enables recording all changes made for items. Over time, the list of changes might become very long.
- Enhancing the list functionality so that recent selected line will remain as long as document number is not changed will improve the user navigation when working with long lists.

Item History List

- The following GUI lists will be enhanced so that user's selected row will be kept (instead of returning back to the top of the list).
 - **All Items History list/Item changes** - the recent selected row will be kept as long as referring to the same document number.
 - **Specific Item History/Item changes** - the recent selected row will be kept as long as referring to the same item.

Item History List

- When user initially loads doc number/item, the first row will be selected.
- User may select any other entry in the list. This selection will be kept until another doc number/item is loaded.
- The enhanced functionality will be implemented in the following:
 - GUI-Cataloging-Items tab
 - GUI-Circulation-Items tab
 - GUI-Acquisition/Serials-Serials tab

Item History List

The screenshot displays the ALEPH Cataloging interface. The title bar indicates the library is USM01 - USMARC Bibliographic (USM01) and the user is MASTER. The menu bar includes options like View, Cataloging, Items, Edit Actions, Edit Text, Record Manager, Remote, *Services, and Help. The main window shows a record for 'BIB= 600 ADM= 600 - Bulletin. (Société verviétoise d'archéologie e) Year: 1898.' The left sidebar contains a tree view with 'Items List (0/22)' expanded, showing 'All Items History' and 'Item (600-220)' selected. The 'Item Changes' tab is active, displaying a table of history entries.

H.Date	H. Hour	Cataloger
06/01/14	10:34	MASTER
06/01/14	10:34	MASTER
06/01/14	13:35	MASTER
06/01/14	13:37	MASTER
06/01/14	13:39	MASTER

Add Loan Due Hour to Items info RESTful-API

- The GetItemInfo RESTful-API returns information about the item, based on the Item BIB system number and Item number in the library (institution).
- This RESTful-API does exist in Aleph and return the item bibliographic information, including the current circulation status. The status varies according to the current item situation in the library whether it's on self, on hold, on loan, recalled etc.
- If item is on loan the function currently return the due date of the item.

Add Loan Due Hour to Items info RESTful-API

- The GetItemInfo RESTful-API will be enhanced to return the due date and the due hour as item status in case the item is on loan.
- When item is not on loan the functionality will stay without any changes.
- The format of the time will be displayed at the discovery application will be based on Aleph configuration ('time_style_s' environment variable).
- When a specific format will not be indicated, Aleph will use its internal defaults.

Add Loan Due Hour to Items info RESTful-API

- Specific Item - this services accepts BIB Record number and ItemId and retrieves the item bibliographic information in details including the item circulation status.
- The status tag will include current due date and due hour in case the item is on loan.
- The time format will be displayed according to Aleph configuration.

Add Loan Due Hour to Items info RESTful-API

- Following is an example of a call to the service when an item is on loan:

Url: <http://server:port/rest-dlf/record/USM01000016325/items/USM50000016325000010>

```
- <get-item>
  <reply-text>ok</reply-text>
  <reply-code>0000</reply-code>
- <item>
  <z30-sub-library-code>MUS</z30-sub-library-code>
  <z30-item-process-status-code />
  <z30-item-status-code>01</z30-item-status-code>
  <z30-collection-code>GEN</z30-collection-code>
  <queue />
+ <z30>
+ <z13>
  <status>29/01/14 12:02</status>
  </item>
</get-item>
```

API to enable integration with external payment system

- Enhancing Aleph to enable integration with external payment system so that users will be able to pay their fines via Discovery Interfaces (Aleph OPAC/ PRIMO etc.);
- Allow patrons the ability to pay library fines and fees online
- Improve the user experience and ease library staff work, when dealing with fines/fees payment.

API to enable integration with external payment system

- The ability to enable internet payment solutions to get data from Aleph, perform payment and update Aleph with payment confirmation; will streamline the library payment workflow:
 - Payment can be done in real-time from anywhere
 - No specialized equipment needed in libraries
 - Increase patron satisfaction
 - More payment options - credit card...
 - Reduced number of cash transactions for faster balancing, more security
 - Deposits made automatically to university financial system

API to enable integration with external payment system

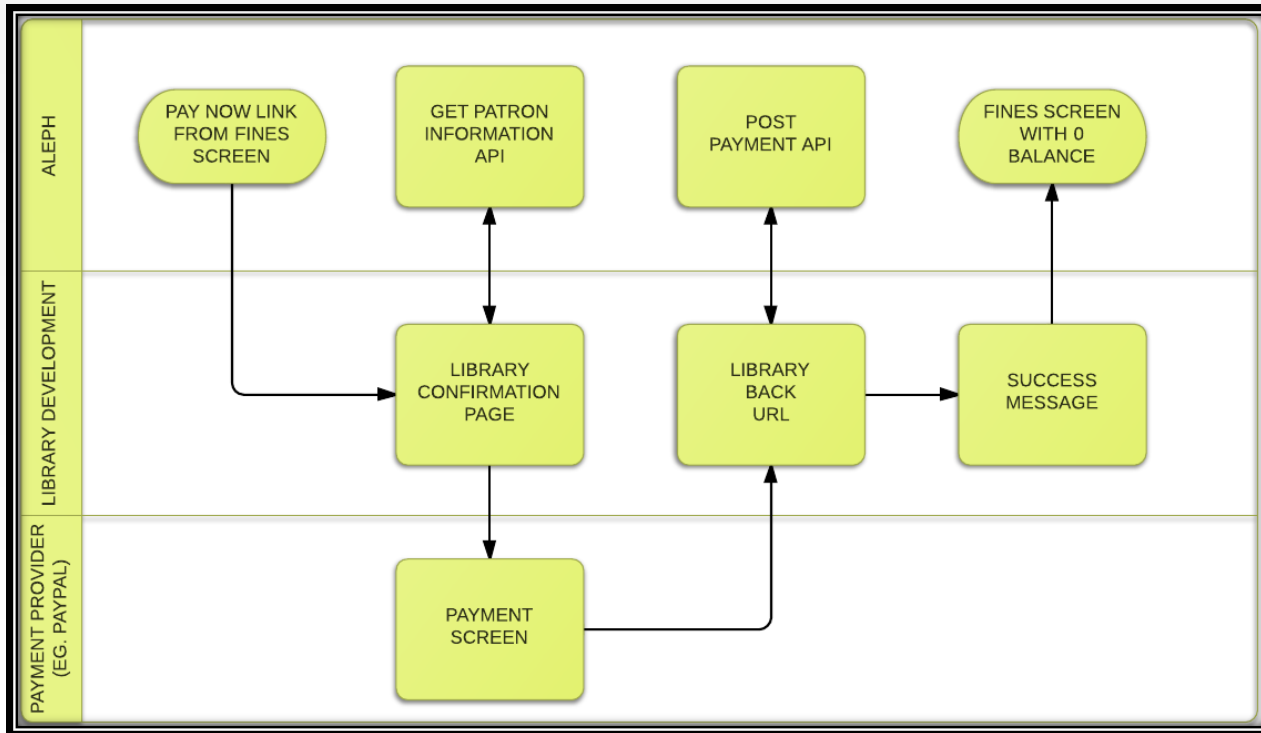
- There are many external payment systems (providers); each has its own methodology.
- In order to allow libraries integrate with any provider, Aleph will implement RESTful-API communication with the providers and a new workflow for:
 - Sending cash transaction payment details to the provider
 - Updating Aleph with payment details from the provider

API to enable integration with external payment system

- **Aleph integration with payment system**

- Aleph will provide two RESTful-APIs, one for sending payment data to the provider and another for updating Aleph with payment details after action is completed.
- The library will be responsible for transferring payment data to the relevant provider (e.g. PayPal, dibs, wpm, etc.) and getting payment approval/response from the provider.
- Upon moving to the provider interface, the relevant flow will be invoked (as designed by the internet payment solution provider).
- The library will need to open a payment receiving account at the provider site and transfer all details when applying to the provider (according to the provider's requirements).

API to enable integration with external payment system



API to enable integration with external payment system

- **Pay fine link in OPAC**

- In order to enable payment of library's fine via Discovery Interface (Aleph/Primo/etc.) the library will have to add a new link to the Library Card-Cash Transactions List.

API to enable integration with external payment system

- **Pay fine link in OPAC**

- For **example** - the new link, *Pay Now*, is placed next to the total amount of the user's fine in an ADM library.

The screenshot shows the OPAC interface for a user named Oscar Aaberg. The top navigation bar includes links for 'End Session', 'My Library Card', 'Preferences', 'Browse', 'Search', and 'Results List'. Below this, there are links for 'User Info', 'Loans', 'Hold Requests', 'Booking Reqs', 'Cash Transactions', 'ILL Request', and 'Acq R'. The main content area displays the user's name and the title 'USMARC ADM (USM50) - Cash Transactions (Aaberg, Oscar)'. A summary line shows 'USMARC ADM (USM50) : -270.11' with a 'Pay Now' link highlighted in a purple box, and 'USMARC ADM (USM51) : 0.00'. Below this, it states 'The accrued fine for overdue items is: 0.00'. A table lists various sublibraries with their respective balances and amounts transferred to accounts receivable. At the bottom, there is a note about transaction details and a table with columns for 'No.', 'Author', and 'Bibliographic Info'.

Sublibrary	Balance	Transferred to Accounts Receivable
Exlibris Demo Libraries	- 15.00	0.00
East Asian Library	- 84.00	0.00
Humanities Library and Reading	- 11.00	0.00
Law Library	- 48.52	0.00
Main Library	- 78.05	0.00
Main Undergraduate	- 3.00	0.00
Medicine Library	- 23.02	0.00
Musikbiblioteket	- 7.52	0.00
Total:	- 270.11	0.00

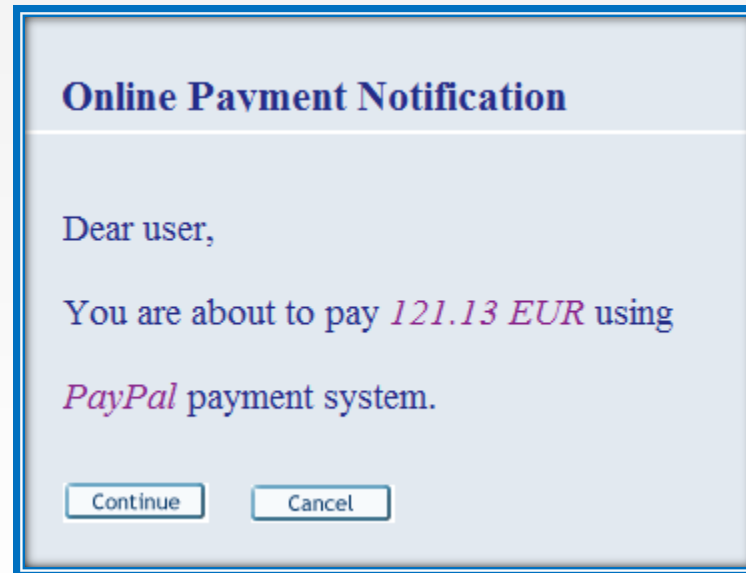
No.	Author	Bibliographic Info
<u>1</u>		No bib information
<u>2</u>		No bib information
<u>3</u>		No bib information
<u>4</u>		The New England journal of medicine.
<u>5</u>		No bib information
<u>6</u>	Viets, Henry R. (Henry Rouse), 1890-	A brief history of medicine in Massachusetts /
<u>7</u>		Buchreihe der Zeitschrift für celtische Philologie.

API to enable integration with external payment system

- The *Pay Now* link will offer paying the total sum of patron's fine for a specific institution (ADM library).
- The library will design a HTML page (the *Library Confirmation Page*) to which user will be directed after the *Pay Now* link is clicked.
- Clicking the *Pay Now* link will load the '*Library Confirmation Page*'. This page will call a RESTfull API for the user's circulation action (similar to the info show at OPAC-Library card), Including the total sum of the user's fine per ADM library.

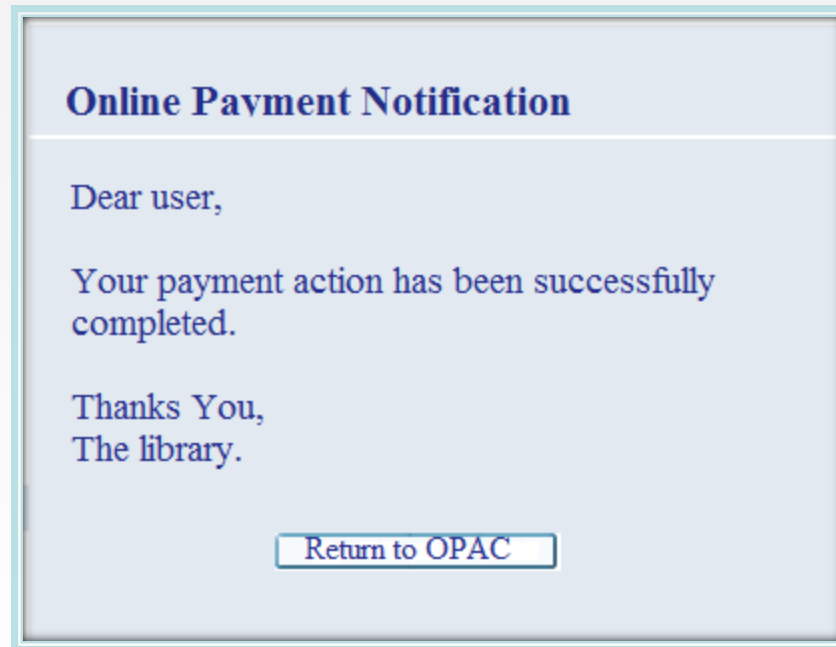
API to enable integration with external payment system

- The format and content of the page will be decided by the library. For example:



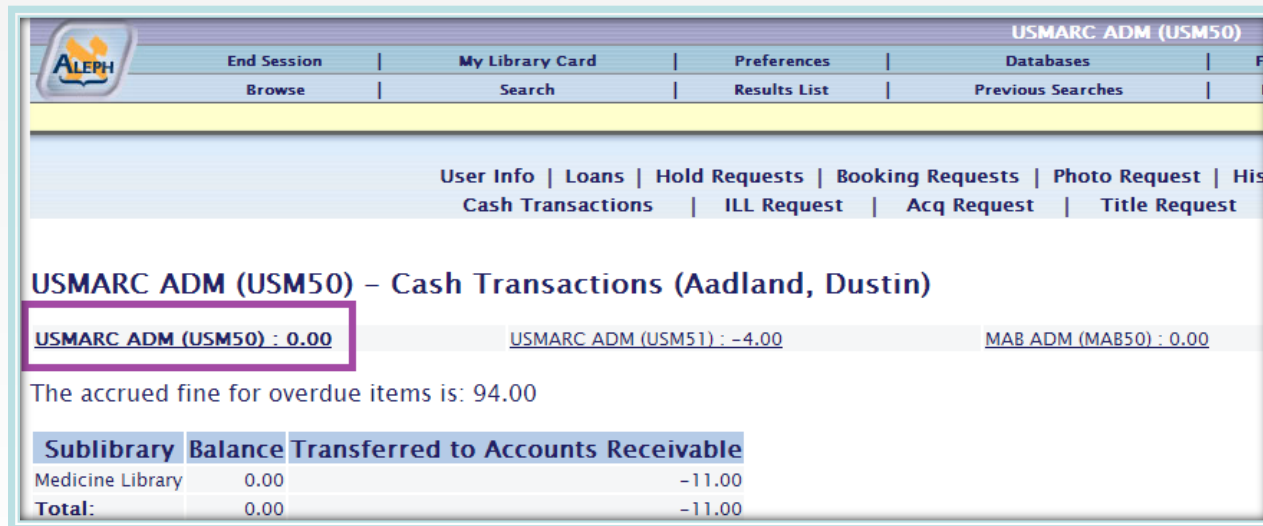
API to enable integration with external payment system

- Successful payment – Success Message page (designed by the library) – example:



API to enable integration with external payment system

- Successful payment – return to Aleph OPAC:



USMARC ADM (USM50)

End Session | My Library Card | Preferences | Databases | F
Browse | Search | Results List | Previous Searches | F

User Info | Loans | Hold Requests | Booking Requests | Photo Request | His
Cash Transactions | ILL Request | Acq Request | Title Request

USMARC ADM (USM50) – Cash Transactions (Aadland, Dustin)

USMARC ADM (USM50) : 0.00 USMARC ADM (USM51) : -4.00 MAB ADM (MAB50) : 0.00

The accrued fine for overdue items is: 94.00

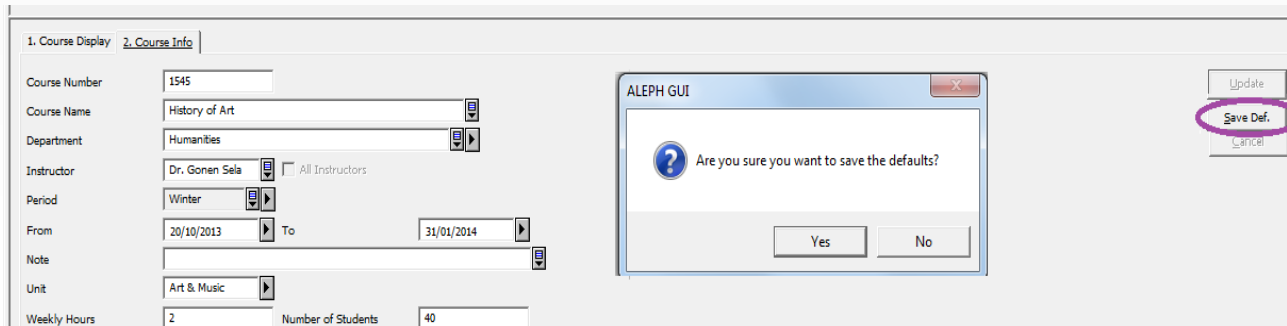
Sublibrary	Balance	Transferred to Accounts Receivable
Medicine Library	0.00	-11.00
Total:	0.00	-11.00

Save Defaults for Course Information

- Adding Save Defaults button on the Course Information form will reduce the manual typing and increase the efficiency of handling of course information when entering several courses for the semester.
- Save Defaults button will be added to GUI-Circ-Course Information Tab.
- Delete Course Defaults option will be added GUI-Circ-Upper bar ALEPH menu.

Save Defaults for Course Information

- A new **Save Defaults** button will be placed at Course Info form.
- The button will be enabled (when adding a new course and when updating an existing one).
- Upon clicking the Save Default button, a user's confirmation window will pop-up: Are you sure you want to save the defaults? Yes/No.



The screenshot shows the '2. Course Info' tab in the ALEPH GUI. The form contains the following fields:

Course Number	1545		
Course Name	History of Art		
Department	Humanities		
Instructor	Dr. Gonen Sela <input type="checkbox"/> All Instructors		
Period	Winter		
From	20/10/2013	To	31/01/2014
Note			
Unit	Art & Music		
Weekly Hours	2	Number of Students	40

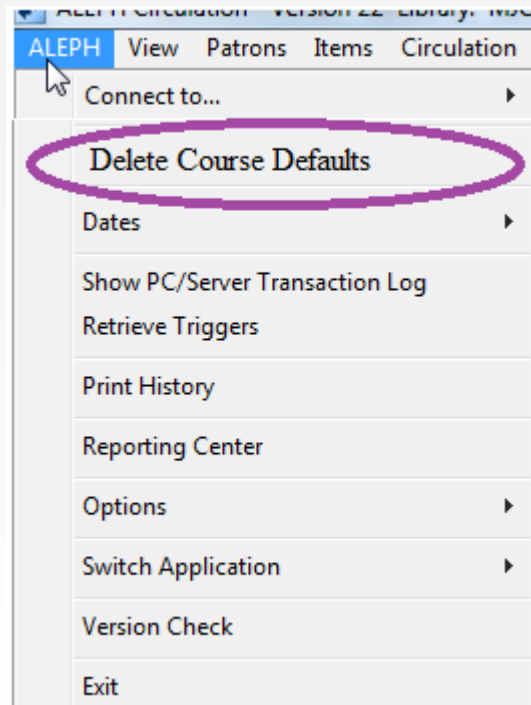
On the right side of the form, there are three buttons: 'Update', 'Save Def.' (circled in red), and 'Cancel'. A confirmation dialog box titled 'ALEPH GUI' is overlaid on the form, asking 'Are you sure you want to save the defaults?' with 'Yes' and 'No' buttons.

Save Defaults for Course Information

- If the user clicks the **Save Default** button and responded - Yes; the system will save the values the user entered and copy them to each new course form the user opens.
- The fields that are saved and copied are: Department, Instructor, Period, From and To date fields, Unit, Weekly hours
- Defaults are saved per workstation.
- The Save Defaults values will be pre-populated every time a new course is added; until the next time the "Save Defaults" button is used and new values are saved.

Save Defaults for Course Information

- A new option, Delete Course Defaults, will be added to GUI-Circ-Upper bar menu – ALEPH:



- The option will be enabled when there are course values saved as defaults.
- Use the Delete Course Defaults option to clear any default information that had been previously saved

Other enhancements

Support for 3M Staff Station

- Aleph currently supports communication with several RFID Vendors/devices
- The goal of this development is to add support for communication with an additional RFID vendor - 3M.
- The supported workflows will be the same as for the other vendors.

Support for 3M Staff Station

- Aleph should be configured to use the RFID tags/readers
- There are two main workflows in Aleph related to RFID tags readers:
 - Item information: Update RFID tag with item information upon item information change (e.g. update of item record, transfer, hold, booking)
 - Checkin and checkout: when an item is checked in or checked out, the RFID Reader will update the circulation status of the item. This information can be used by the security gate
- These workflows are already supported in Aleph for two RFID vendors and will be supported to 3M as well
- The workflow will be supported using web service (SOAP protocol)

RESTful-API: Informative Message when Renew is Denied

- Currently a generic message displays to the end user
- Enhancement - Providing the specific reason as to why a renewal is not possible.
- Will be added to "Loans" service, "renew" action.

RESTful-API: Patron Warnings when Signing in

- "Get Patron Information" service
- Display of popup or alert message on logging in where fines, overdues, blocks, expired patron record, etc. exist.

Enhancement to Display Oracle tables data (UTIL F/4)

- When using UTIL F/4 to display Aleph doc(s), it is possible to add data using expand_doc routine
- This option actually can be used to test an expand_doc
- The same functionality is required for fix_doc routines and will enable testing the routine
- A new view option will be added to Util F/4:

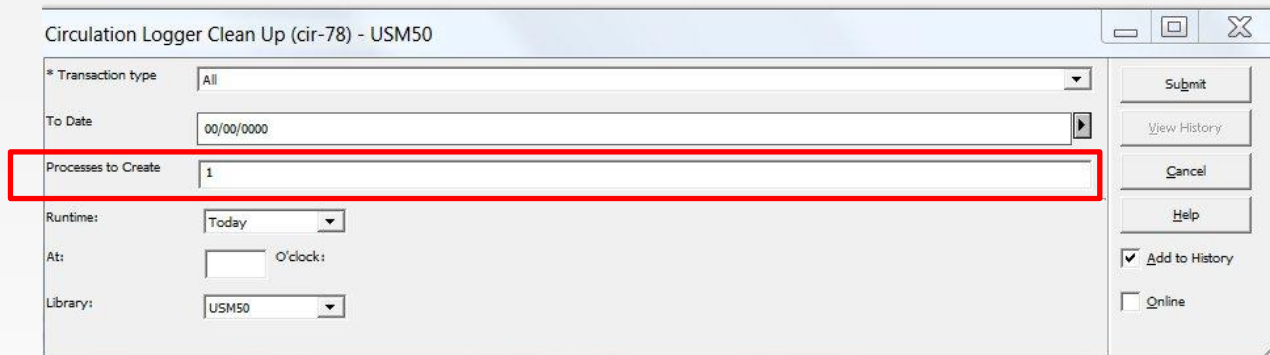
```
***** util_f_04 display Oracle tables data *****
Your active library is USM50
pw_library: USR00    usr_library: USR00
z00 related: z00/z00p/docp/z13/z13u/doc_h/doc_char_conv
[d] - doc           - z00 enriched with routines listed under U39-DOC in tab_expand
[e] - doc_expand    - z00 enriched with programs under a specific section in tab_expand
[n] - doc no expand - z00 as is, without any expand routines
[f] - doc_fix       - z00 enriched with programs under a specific section in tab_fix
    - z01/z02/z103/z11/z106
    - z95/z97/z98/z980/word3
    - z101
    - z05/z110/z108/z112
    - z07/z07p/z105/z120/z127/z128
    - z12/z14/z16/z18/z20/z22
    - z30/z30h
    - z111/z104
```

Performance improvement in p-cir-78

- Improve the performance of service p-cir-78 (cleanup of Circulation Logger table Z309).
- A very big Z309 table causes many Circulation activities to be slow, since a log is written to Z309 together with the ongoing activity
- Therefore it is recommended to clean up the Z309 table regularly
- This cleanup is a heavy task with many Oracle I/O in the ADM library, and is sometimes very slow (several hours).

Performance improvement in p-cir-78

- A new parameter enabling to divide the running of the service into several processes will be introduced



Circulation Logger Clean Up (cir-78) - USM50

* Transaction type: All

To Date: 00/00/0000

Processes to Create: 1

Runtime: Today

At: O'clock

Library: USM50

Submit, View History, Cancel, Help, Add to History, Online

- The number of processes should be 1-50
- The choice depends on the number of CPU in the server, and also whether it is running at a busy time. The division into several parallel processes will enable the process to run faster.

Clean events and historic information tables

- Cleaning-up Z35, Z30H, Z36H, Z37H, Z38H and Z69 records
- These Oracle tables contain a large amount of historical information from either an ADM or BIB libraries
- The tables are automatically created and updated by the GUI and OPAC applications when user performs specific operations
- There is a need to clean those tables from time-to-time (to avoid storing huge amount of old data)

Clean events and historic information tables

- A utility is required to clean the historic information from the following tables:
 - Z35 - Information regarding the transactions of the Circulation and the Search functions
 - Z30H - History of items (copies)
 - Z36H - History of loan transactions.
 - Z37H - History of request transactions.
 - Z38H - History of photocopy request transactions.
 - Z69 - Events that have occurred during use of the Web OPAC

Under design

Technical

- Windows 8.1 certification

ARC 4

- ARC 4 was released with V22.0
- What is new in ARC 4:
 - New/Enlarged fields
 - Option to save log files
 - New Cognos version – Cognos 10.2

ARC 4.0 - New/Enlarged fields

- Patron global information:
 - Patron First Name
 - Patron Last Name
 - Birthplace
 - Note-3
 - Patron address – enlarge to 200 characters.
 - Patron barcode and additional ID - enlarge to 255 characters.
- Order information:
 - First Arrival Date
 - Last Arrival Date
- Request information:
 - Request Time Stamp

Option to save log files

- It is now possible to keep the ETL log files.
- When the following variable is defined in \$data_root/prof_library of the ADM library:

```
setenv keep_arc_log_files Y
```

- Log files of the ETL will be saved with timestamp suffix and won't be deleted. For example:

```
p_arc_01.log.20140115.065049
```

New Cognos version – Cognos 10.2

- ARC4 is released with Cognos 10.2 (The latest Cognos version).
- Cognos 10.2 new features:
 1. Cognos workspace
 2. Enhanced Charts
 3. Active report
 4. External Data source

Cognos workspace

- A new tool to create dashboards in Cognos
- Each object in existing reports can be included in the dashboard
- Dashboards can include also widgets
- Interactive – User can enter prompt values or filters
- Dynamic – User can add/remove objects from the dashboard
- Enables users to assemble and explore all types of data in any time

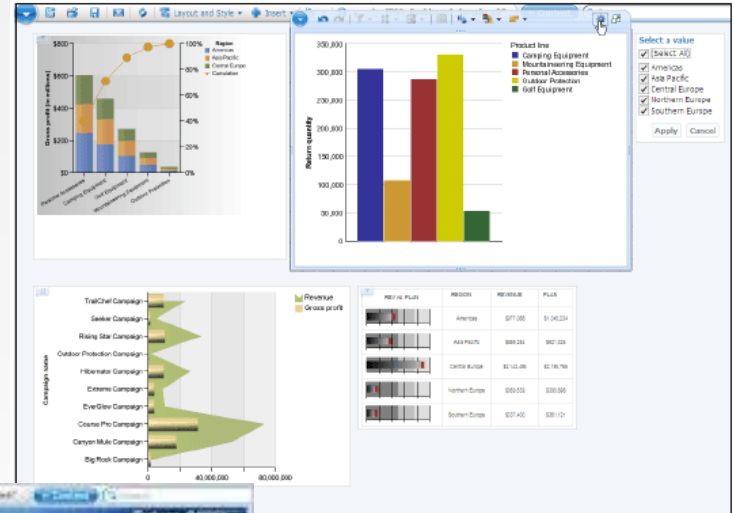
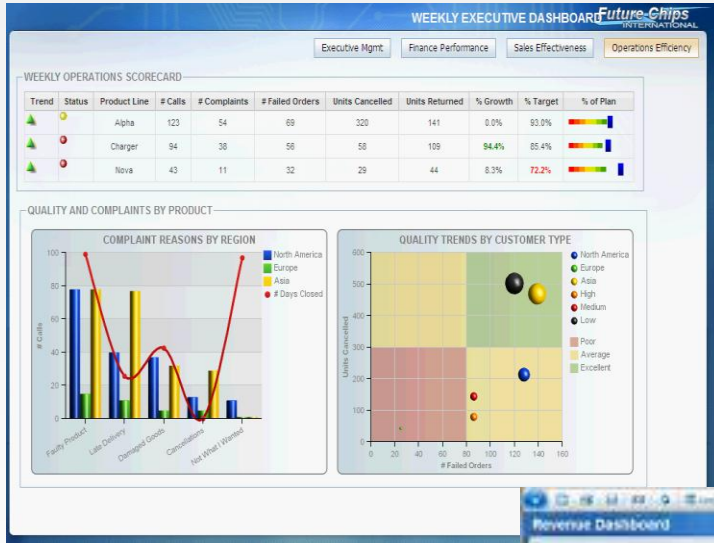
Cognos workspace screen

The screenshot shows the Cognos workspace interface with several key components labeled:

- Dashboard:** The main area containing various data visualizations.
 - Top Left:** A combined bar and line chart showing Gross profit (in millions) by Region (Americas, Asia Pacific, Central Europe) and Cumulation across product lines: Personal Accessories, Camping Equipment, Mountaineering Equipment, Outdoor Protection, and Golf Equipment.
 - Top Right:** A bar chart showing Return quantity by Product line: Camping Equipment, Mountaineering Equipment, Personal Accessories, Outdoor Protection, and Golf Equipment.
 - Bottom Left:** A horizontal bar chart comparing Revenue and Gross profit for various campaigns: TrailChef Campaign, Seeker Campaign, Rising Star Campaign, Outdoor Protection Campaign, Hibernator Campaign, Extreme Campaign, EverGlow Campaign, Course Pro Campaign, Canyon Mule Campaign, and Big Rock Campaign.
- Application bar:** The top navigation bar containing menus like 'Layout and Style', 'Insert', and 'GO Sales Dashboard'.
- Content pane:** A tree view on the right side showing the hierarchy of content, including 'My Folders', 'Public Folders', 'Samples', 'Models', and 'GO Data Warehouse (analysis)'. A search bar is located at the top of this pane.
- Widgets:** A central table titled 'REV vs. PLAN' with columns for REGION, REVENUE, and PLAN. It includes a 'Select a value' filter and 'Apply'/'Cancel' buttons.

REV vs. PLAN	REGION	REVENUE	PLAN
	Americas	\$977,088	\$1,045,234
	Asia Pacific	\$859,254	\$921,325
	Central Europe	\$2,143,495	\$2,195,765
	Northern Europe	\$369,539	\$395,898
	Southern Europe	\$337,400	\$361,121
- Filter:** A 'Select a value' dropdown menu with checkboxes for '(Select All)', Americas, Asia Pacific, Central Europe, Northern Europe, and Southern Europe.
- Content tab:** A tab at the bottom of the Content pane labeled 'Content'.
- Toolbox tab:** A tab at the bottom of the Content pane labeled 'Toolbox'.

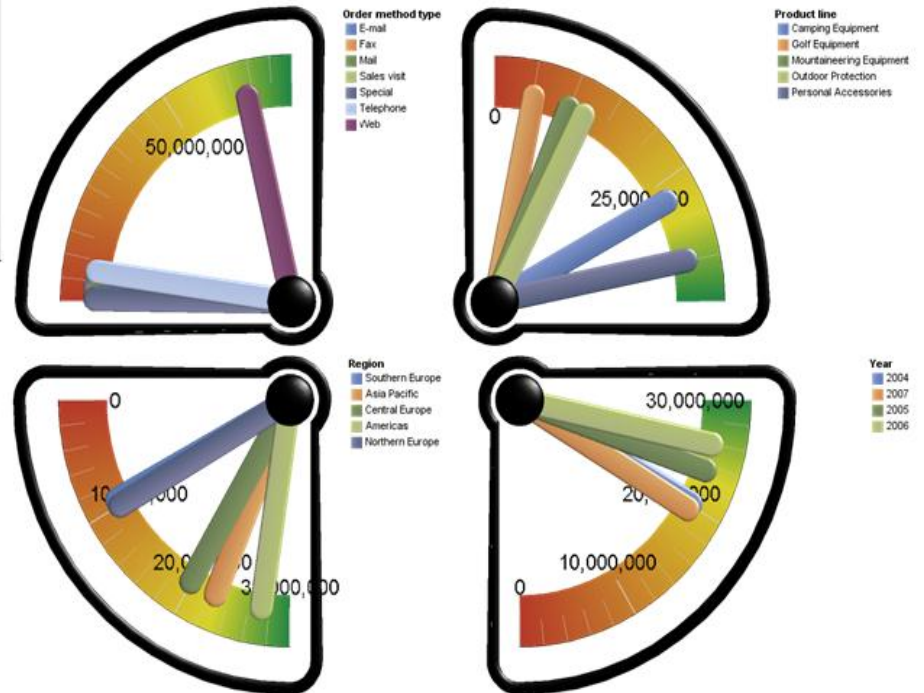
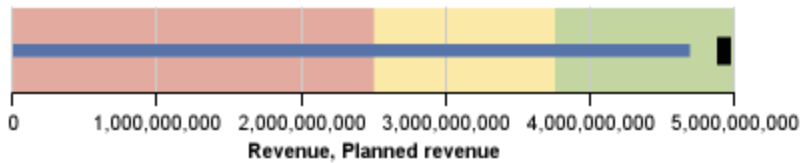
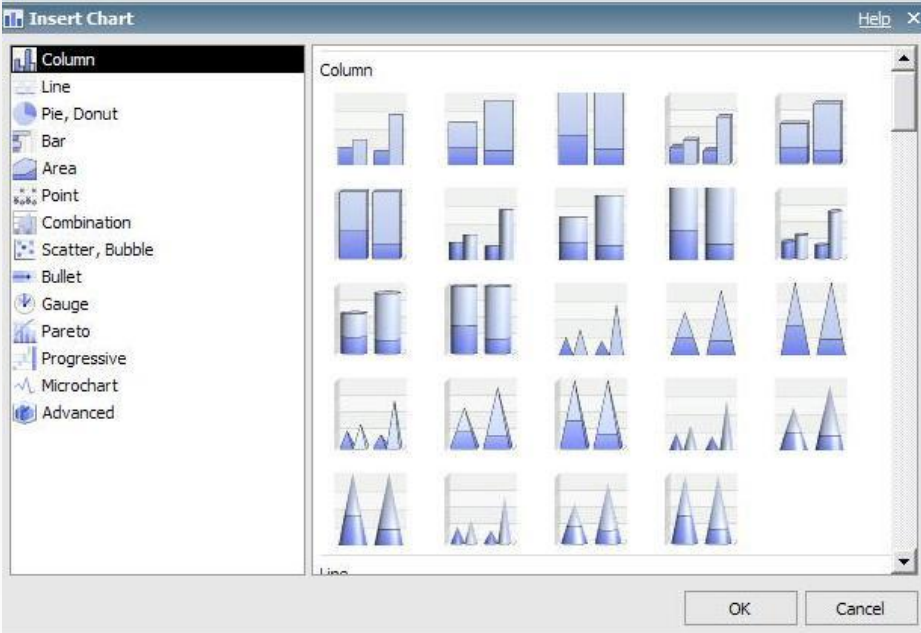
Cognos workspace - Examples



Enhanced Charts

- Report Studio is now using a **new chart engine** for any new chart create.
- The new charting engine will allow setting more properties to modify the appearance, and will give a preview of the chart at design time.
- New types of charts where added- bullet charts, spark lines etc

Enhanced Charts – New charts



Active reports

- Active report is a stand-alone file that can run outside the ARC DB and show the data interactively
- This tool gives the ability to send reports to management without a real connection to ARC DB.

Active reports examples

Revenue per year
 Revenue per product line
 Revenue per country
 Revenue Chart

E-mail

2004 2005 2006 2007

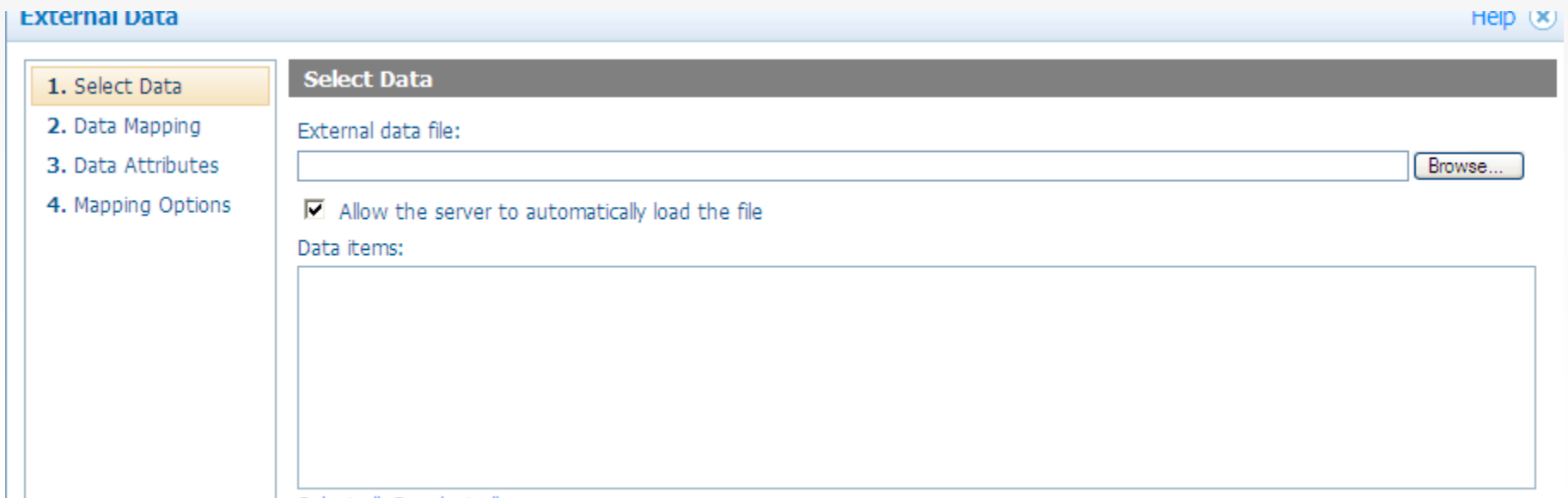
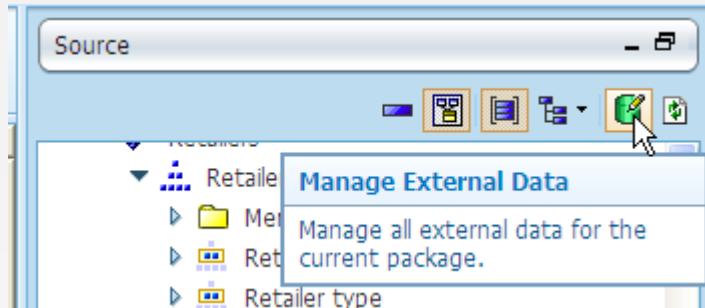
Product line	Year	Order method type	Quantity	Unit cost	Unit price	Unit sale price	Gross margin	Gross profit	Product cost	Planned revenue	Revenue
Camping Equipment	2004	E-mail	733,311	87.35	145.70	135.32	39.6899%	13,906,513.6	25,218,121.13	42,460,122.82	39,124,634.73
Golf Equipment	2004	E-mail	206,786	266.63	533.83	491.60	48.9781%	13,575,329.72	15,747,208.20	32,249,254.31	29,322,537.92
Outdoor Protection	2004	E-mail	619,676	4.81	9.77	9.36	57.6910%	2,356,842.42	1,779,072.93	4,362,354.98	4,135,915.35
Personal Accessories	2004	E-mail	426,622	57.62	102.60	101.42	41.7221%	9,048,984.69	13,770,723.52	23,454,006.13	22,819,708.21
Overall - Total			1,986,395	416.405928	791.902502	737.68842	1.880810824368267	38,887,670.43	56,515,125.78	102,525,738.24	95,402,796.21

Jan 6, 2011 1:37:48 PM

External Data source

- Ability to merge corporate information with external file-based data.
- Excel, tab-delimited text files, csv-files and XML-data files can be imported as external data
- External data are available from the report studio tool
- When external data is imported, a new package is created
- Provide users with the flexibility to use additional data without impacting the BI system

External Data source - Example



Thank you

carmit.marcus@exlibrisgroup.com

