ExLibris
Verde

Verde-Aleph Interoperability Guide

Version 2.0

ExLibris The bridge to knowledge

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Overview

Verde serves as a single point of maintenance for e-resource data that is shared by a library's suite of automation tools. It is intended to facilitate collection management decisions by providing information about the size and composition of the current collection, including data on the price of resources already in the collection.

Although Verde has no full acquisitions module, it can store acquisition information (order and vendor-related details, invoices, price sharing), which can be updated from Aleph via standard batch processes. At the same time, Verde can trigger some actions in Aleph.

The **order management, funding and invoicing** is done outside of Verde. Verde, however, can initiate the purchase request as well as the renewal or cancellation of the e-resource.

The Verde data structure, accounting for the unique nature of the e-resources, allows for the handling of tasks that have no easy solution in traditional library systems and stores business terms, such as print cancellation restrictions, price caps, and rate of inflation. Electronic and print resources are often linked; Verde stores information about print subscriptions bundled with the electronic ones.

For these reasons and others, data exchange between Verde and traditional acquisition systems is very important.

Aleph can query Verde about print cancellation restrictions before canceling an active order and can check for availability and coverage of electronic versions before creating a new print order.

Verde, in its turn, can query Aleph about invoice and order status.

This document describes the functionality and the required setup for this interaction.

Overview of Acquisition Management for Sites that Work in Aleph and Verde

e-Product Lifecycle	Verde	Aleph
Pre-Acquisition		
Discovery	☑	
Evaluation	☑	
Approval	☑	
Negotiation	☑	
First-Time Acquisition		
Order		☑
Implement e-resource	☑	
Ongoing		
Invoice		☑
Fund management		☑
Review	☑	
Renew	☑	
Allocate/share cost	☑	
End		
Decision to cancel	☑	
Cancel order		☑
Withdraw e-resource	☑	

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From Aleph to Verde – Batch Loads

Verde Acquisition Data Loads

Verde allows the following types of acquisition data loads:

- Initial load of print serial orders
- Update of print and electronic subscriptions

Initial Load of Print Serial Orders

A library may choose to load print serial orders. This process will result in the creation of e-print, acquisition, and invoice records in Verde. Note, however, that the load will only be successful if corresponding work records exist in Verde. The match is performed on ISSN and ISBN. If no matching work is found, the record is rejected and must be added manually.

Update of Print and Electronic Subscriptions

To enable this functionality, some preliminary steps must be performed:

- Acquisition records must be created in Verde. (This is done by the localization batch job, which loads SFX holdings to Verde.)
- The Verde acquisition number must be entered into the **ERM ID** field of the Aleph order.

Once this preparatory work has been carried out, batch updates are enabled, and can be run on a periodic basis.[1]

Note: When acquisition records are loaded, linked invoices will be loaded as well.

Selecting and Exporting Serial Orders from Aleph

Serial records need to be identified in Aleph and exported at regular intervals for load into Verde. The update of Verde acquisitions from Aleph will include three steps:

- Selecting (retrieve) appropriate serial orders from Aleph

- Exporting serial orders from Aleph

- Importing serial orders into Verde

Step 1. Select (Retrieve) Appropriate Serial Orders from Aleph

The Aleph batch process **General Retrieval Form (p_acq_02_01)**, which is available via the Services menu of the Aleph Acquisitions/Serials module can be used to retrieve appropriate serial orders.
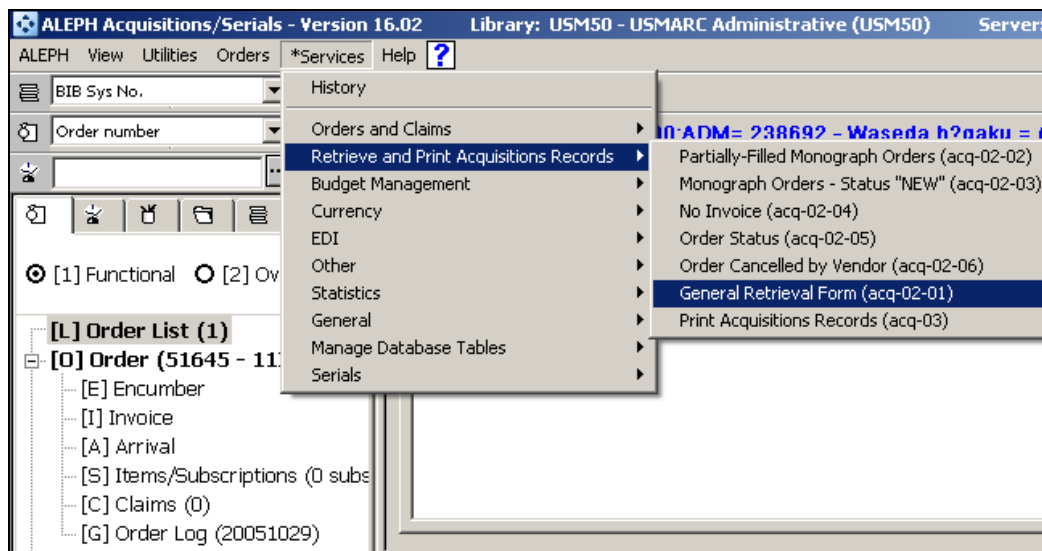
Figure 1. Service -> Retrieve and Print Acquisition Records -> General Retrieval Form (acq-02-01)

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[1] In order to establish on-line Verde → Aleph communication, the Aleph order number must be placed in the **Purchase order number** field of the Verde acquisition record. The Aleph order number, as well as other order details, will be entered into the Verde acquisition record as soon as the first acquisition load is run.

This service retrieves the record numbers of acquisition orders according to a number of different parameters of your choice.

Some of the parameters that may be useful for retrieval of the relevant information are:

- Order status

- Order type

- Material type

- Material format [2]

- Sub-library

- Invoice status

- Invoice payment day

Figure 2. General Retrieval Form

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[2] The field is available from Aleph500.17 onwards. Libraries working with Aleph500.16, or Aleph500.17 customers, who make no consistent use of the **Material Format** field, will need to find data elements allowing them to distinguish between print and electronic subscriptions.

Following are examples of print and electronic General Retrieval Form (p_acq_02_01) usage:

Print Resources

Print Resource	Description
Initial load	Use p_acq_02_01 to select active serial orders: ▪ Order status – SV or RSV ▪ Order type – S ▪ Material format – PRN or any other field or combination of fields that allows for distinguishing between print and electronic subscriptions In addition, libraries might want to filter this set of active serial orders by: ▪ Sub-library ▪ Material type ▪ Order group
Ongoing load	Use p_acq_02_01 to select print serial orders that have been created, cancelled, or invoiced since the last retrieval. New orders are loaded as new. Updated records are loaded as updates. p_acq_02_01 is run multiple times to retrieve the required data.

The following are some parameter options for running p_acq_02_01:

▪ New e-print orders

  ▪ Order type – S

  ▪ Material format – PRN or any other field or combination of fields that allows for distinguishing between print and electronic subscriptions

  ▪ Order status – SV or RSV

  ▪ Open date > date the last process was run

▪ Cancelled orders

  ▪ Order type – S

- Material format – PRN or any other field or combination of fields that allows for distinguishing between print and electronic subscriptions

- Order status – CLS, VC, LC

- Order status date > date the last process was last run

- Newly paid invoices for e-print records

  - Order type – S

  - Material format – PRN or any other field or combination of fields that allows for distinguishing between print and electronic subscriptions

  - Invoice payment status – P

  - Invoice payment date > date the last process was run

Electronic Resources

The Verde localization process (the loading of the SFX active resources to Verde) creates initial acquisition records for each active e-package or e-standalone.

The next step is to:

- identify orders for electronic resources in Aleph

- retrieve active orders

- attempt to match the orders (manually) with the data in the Verde database. When a match is found, put the Verde ACQ number into the **ERM ID** field of the Aleph order. The Aleph order number will be entered into the **Purchase order number** field of the Verde acquisition record as soon as you run the first batch load. After this is done, both batch and online interaction will be possible.

Electronic Resource	Description
Initial load	Use p_acq_02_01 to retrieve all orders for electronic resources: ▪ Order status – SV or RSV ▪ Order type – S ▪ Material format – ELC or any other field or combination of fields that allows for distinguishing between print and electronic subscriptions

Electronic Resource	Description
Ongoing load	Retrieve new and updated orders for electronic resources: • Material format – ELC or any other field or combination of fields that allows for distinguishing between print and electronic subscriptions • Order open date > date the last process was run • Order update date > date the last process was run

The General Retrieval Form (p_acq_02_01) creates an output file in the `$alephe_scratch` directory. This file lists record numbers, without the detailed information for each record, in the following format:

```
00000024800001USM50
00000033600002USM50
00000033600003USM50
00000033600004USM50
00000041400001USM50
00000041400002USM50
00000086400001USM50
```

To produce a file to load into Verde, use the Export Acquisition Records p_acq_30 batch job.

Step 2. Exporting Acquisition Records (p_acq_30)

The Aleph batch process – p_acq_30 – exports bibliographic and acquisition data for the orders retrieved by the batch process p_acq_02_01.

The export file is in XML format and is used for three purposes:

• to create the new e-print records with linked acquisition and invoice records

• to update existing acquisition records (of any type)

• to add invoice records

Data is taken from the following Aleph records:

• Bibliographic record

• Order record

• Encumbrance record

- Subscription record

- General invoice

- Line invoice

The batch process p_acq_30 is activated via the UNIX command line and accepts the following parameters:

```
>>csh -f  $aleph_proc/p_acq_30
p_active_library,p_file_name_in,p_file_name_out, p_export_type,
p_invoice_date_from, p_invoice_date_to,p_invoice_status
```

The following is an explanation of the parameters:

- **p_active_library** – the code of the Aleph administrative library, in which the job must be run.

- **p_file_name_in** – the output file name as defined when running p_acq_02_01. The file can be found in the `$alephe_scratch` directory. It serves as the input file for p_acq_30.

- **p_file_name_out** – the output file name of p_acq_30. It should always be defined as `acqFromAleph.xml`. This output – `acqFromAleph.xml` – can be found in the `$data_print` directory of the administrative library in which the job is run. This is the file that will be transferred to the Verde server and loaded into Verde.

Note: Each run of p_acq_30 overwrites the previously created `acqFromAleph.xml` file. The output files of p_acq_30 must be manually saved before the job is activated the next time.

- **p_export_type** – Aleph 500 version 16 and Aleph 500 version 17 customers who have not made consistent use of the new field, **Material format**, in the acquisition record should do the following:

  - Use the value **PRN** if the input file contains a selection of print subscriptions

  - Use the value **ELC** if the input file contains a selection of electronic subscriptions

  If your library is working with Aleph 500 version 17 and makes consistent use of the **Material format** field, leave the `p_export_type` parameter empty.

- **p_invoice_date_from** – optional; allows for filtering the most recent invoices.

- **p_invoice_date_to** – optional; allows for filtering the most recent invoices.

- **p_invoice_status** – optional; allows for filtering according to the invoice status.

The following is an example of the command that initiates p_acq_30:

```
csh -f $aleph_proc/p_acq_30 USM50,input_file,output_file,PRN
```

Step 3. Importing Acquisition Data

Note: Before starting the import process, make sure that Aleph sub-libraries are defined as libraries in Verde. Codes identical to those of Aleph **must** be used. Note, however, that there is no need to define Verde libraries for Aleph order units. Order units are used for administrative purposes only.

The process of importing has two steps:

- Converting
- Loading

To run the import:

1   Access the UNIX environment of your Verde installation.

2   Transfer (ftp) the `acqFromAleph.xml` file, obtained as a result of running the p_acq_30 process in Aleph as described above, to the `$VERDE_BASE/home/data/import/` directory of your Verde server.

3   Log in to the Verde client.

4   In the Admin module's **Initial** tab, click **Convert Acquisitions** in order to convert the `acqFromAleph.xml` file to the format required for importing into Verde.
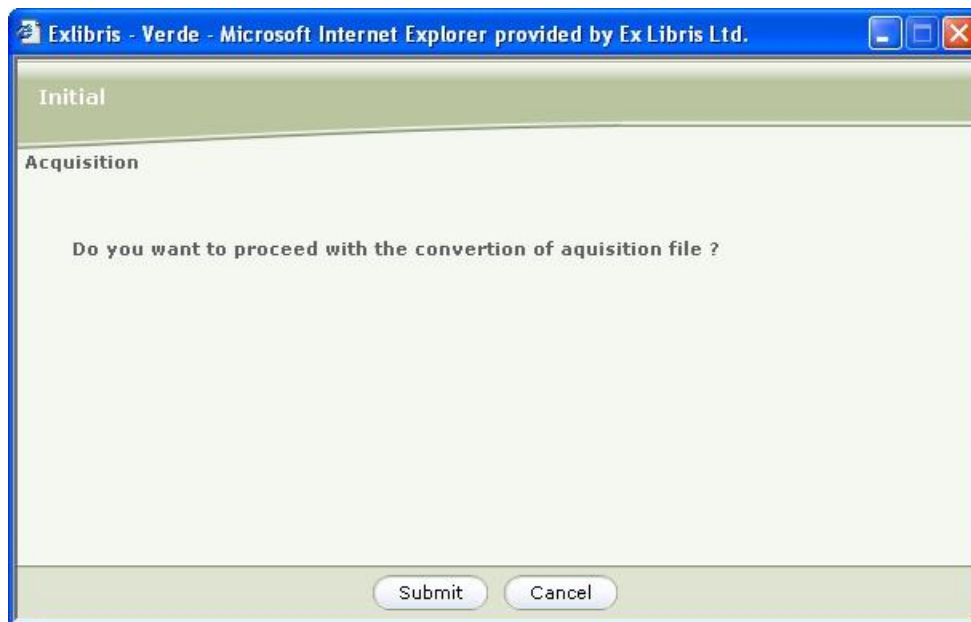
Figure 3. Converting the Acquisition File

5   Click **Submit**.

Alternatively, you can run the conversion process from the UNIX command line in the following way:

On Linux servers:
```
>>vbin
>> ./acqconverter.sh&
```

On SUN servers:
```
>>vbin
>> bash acqconverter.sh&
```

You can monitor the conversion process by viewing the `$VERDE_BASE/home/system/log/acqConvert.log` log file.

As a result of the conversion process, the following file is created:
`$VERDE_BASE/home/data/import/ acqToStandard.xml`

Once the conversion process has been completed, the converted file (`acqToStandard.xml`) can be loaded.

To activate the load:

1   Open the Admin module of your Verde client.

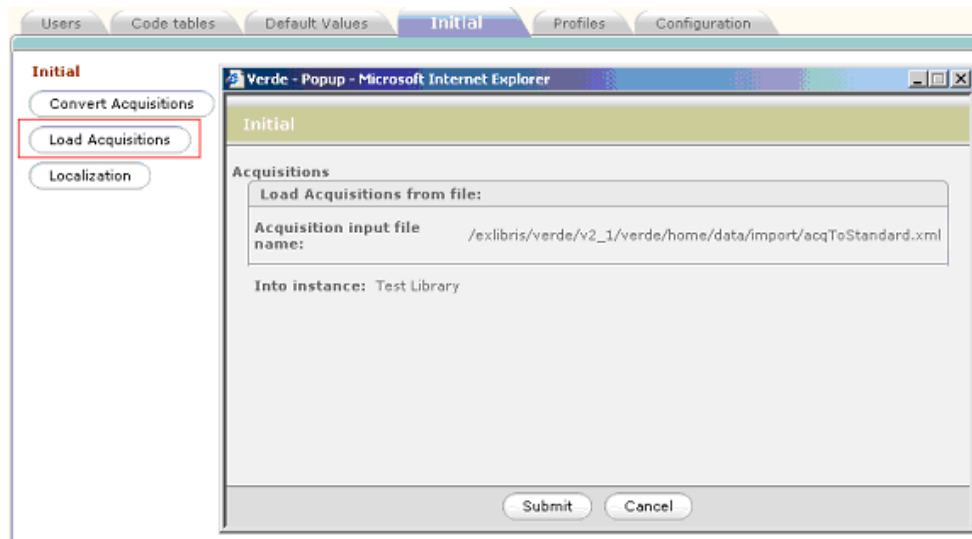2   Click the **Initial** tab.

3   Click **Load Acquisitions**.

Figure 4. Load Acquisitions

4   Click **Submit**.

Alternatively, you can run the load process from the UNIX command line in the following way:

On Linux servers:
```
>>vbin
>> ./acqloader.sh –u /user/ -p /pwd/ -o /INSTITUTE or CAMPUS
```

On SUN servers:
```
>> bash acqloader.sh –u /user/ -p /pwd/ -o /INSTITUTE or CAMPUS
```

You can monitor the load process by viewing the `$VERDE_BASE/home/system/log/acqLoad.log` log file.

In addition, the `acqRejectedNumbers.xml` file is created in the `..data/import` directory. This file includes the following information for each rejected record: the number of the record in the input file and the record's identifier, title, e-product type, acq number, and order number.

Exporting Aleph Vendors

Aleph vendors and vendor addresses can be extracted from Aleph and imported into Verde.

Before starting this process, library staff should first analyze their Aleph vendor file:

- Do the majority of the vendors (in the Aleph vendor file) deal with printed material and monographs?

- Are there relatively few vendors dealing with journals and electronic resources?

If the answers to the above questions are 'yes,' the library might choose to manually create the relevant records in Verde, rather than import a large file of vendors – most of which are not relevant – to Verde.

If you choose this option, note that the Verde vendor record **must** have the same vendor code as the vendor record in Aleph. The only exception to this rule is vendor codes that contain characters that are illegal in Verde. When this happens, the original Aleph code is stored in a field called external code and a new code is generated by Verde. This code is unique and does not contain any illegal values. This is the code that is used by Verde.

Another option is to import the full file into Verde, and delete non-relevant vendors in Verde.

This import process consists of three steps:

- Step 1. Export vendor information from Aleph

- Step 2. Convert this file into the Verde internal format

- Step 3. Load the converted files into Verde

Step 1. Export Aleph Vendors and Vendor Addresses

To extract Aleph vendors and vendor addresses:

1   In the Aleph Acquisitions client (connected to your administrative library), go to **Services -> Manage Database Tables -> Export Database Tables**.
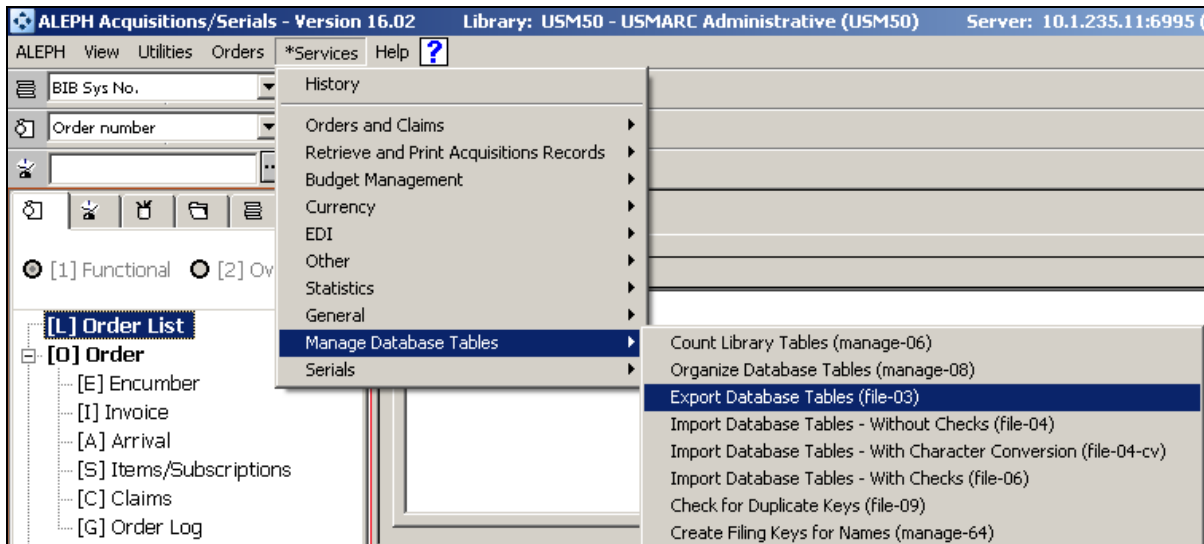
Figure 5. Services -> Manage Database Tables -> Export Database Tables

2   In the **Tables to Export** field, type z70.

3   Keep the **Number of Records per File** blank (in order to get a single file).

4   Click **Submit**.

5   Repeat the above procedure, typing z72 in the **Tables to Export** field, to extract the vendor addresses.

Figure 6. Exporting Database Tables

After both runs of the Export Database Tables (file-03) service, you will have two files – z70.seqaa and z72.seqaa – in the $data_files directory of your active library.

Step 2. Converting the Records to the Verde Format

As with the acquisition data, the import process for vendor (known as organizations in Verde) records is divided into two steps:

- Converting
- Loading

Aleph Vendor Conversion
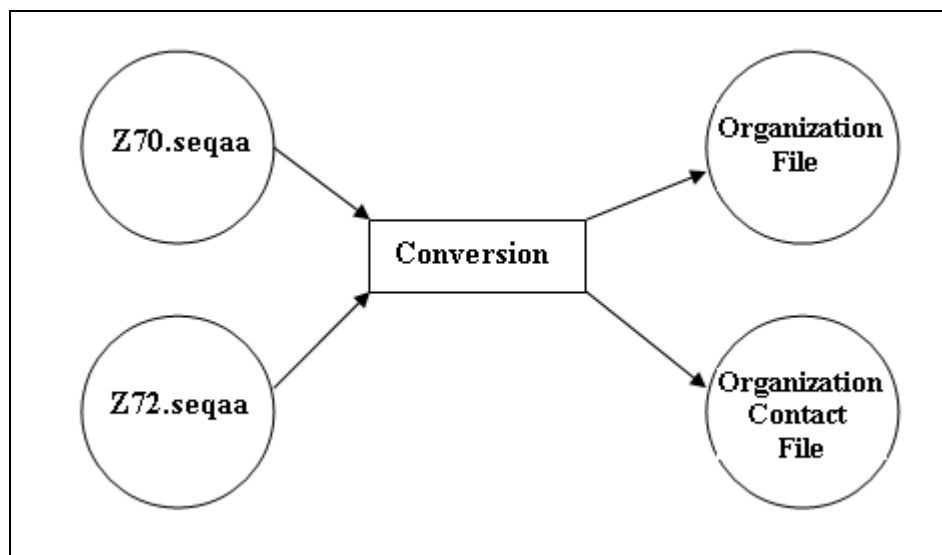
Figure 7. Vendor Conversion Workflow

The Verde Converter loads Aleph export files and converts them to standard Verde organization and organization contact files that can then be loaded into Verde using the organization and organization contact loaders.

To convert the Aleph export files:

1   In Verde's KB Tools module, in the **Select a tool** drop-down list, select **Loader**.

2   In the **Loader** menu, under **Organizations**, select **Aleph Vendors Converter**.

Figure 8. Aleph Vendor Converter

3 Enter the input file load settings as described in the following table:

Field	Description
Vendor file	The location of the `z70.seqaa` input file. ▪ File – Click **Browse** to locate and select the input file. ▪ Location – Enter the path to the file, without browsing.
Vendor address file	The location of the `z72.seqaa` input file. ▪ File – Click **Browse** to locate and select the input file. ▪ Location – Enter the path to the file, without browsing.
Use Aleph version	Select the Aleph version. The possible options are: ▪ 17 or later ▪ 16
On empty structured address use	If the z72 (vendor addresses) input file includes empty structured addresses, select the address type that should be created for the organization address: ▪ Single-line address ▪ Multi-line address For more information, see the following section.

Aleph Vendor Converter Workflow

After Verde verifies that the input files are loaded and structured correctly, Verde checks the mandatory fields:

▪ If the **Vendor code** (converted to the Verde **Organization code**) or **Vendor name** (converted to the Verde **Organization name**) are missing, the vendor is rejected. The related vendor contacts are also rejected.

▪ If values exist for the mandatory fields, the vendor record is converted. Verde maps the Aleph data to Verde organization input file data using the parameters defined in the Task Properties section of the Aleph Vendor Converter screen (see step 3 above).

When you define these parameters, you indicate which Aleph version (17 or later, or 16) you are using and specify whether a single-line address or a multi-line address should be created for each organization address.

The specification of a single-line or multi-line address depends on the initial Aleph vendor address type. When the structured address of the Aleph vendor is empty (that is, the VENDOR-CITY, VENDOR-STATE, VENDOR-POSTAL-CODE, and VENDOR-COUNTRY fields are empty), all the address information is entered as a non-structured vendor address in the **VENDOR-ADDRESS** field. In this case, the information is used to create either a single-line or multi-line address according to the settings defined by the user:

- **Single-line** – The content of the Aleph vendor addresses (up to five addresses) is placed in the Verde organization's **Street name** field, separated by commas. The **City**, **State/Province**, **Zip/Postal code**, and **Country** fields will remain empty.

- **Multi-line** – The content of the first Aleph vendor address is placed in the Verde organization's **Street name**, **City**, **State/Province**, **Zip/Postal code**, and **Country** fields. The second Aleph vendor address is placed in the organization's **Street name** field. The third to fifth Aleph vendor addresses are handled as follows:

  - If the Aleph address line contains a comma, the data that precedes the comma is placed in the Verde **City** field, the data between the first and second commas is placed in the Verde **State/Province** field, and the remaining data is placed in the **Zip/Postal code** field.

Note: An American state can consist of two words, which can be interpreted by Verde as a double-word state or as a state + zip code. Verde operates as follows in such cases: If there is only one word, it is placed in the **State/Province** field. If there is more than one word and the last word contains digits, the last word is placed in the **Zip/Postal code** field and the preceding words are placed in the **State/Province** field. If there is more than one word and the last word does not contain digits, all the data is placed in the **State/Province** field.

  - If the Aleph address line does not contain a comma, the data is appended to the Verde **Country** field, preceded by a comma, in the case of the third Aleph address and to the Verde **Zip/Postal code** field, preceded by a comma, in the case of the fourth or fifth Aleph address.

As result of the conversion process two output files are created in CSV format.

Conversion Output Files

Two standard output files are created during the conversion process. The following tables describe the full list of fields and field content in each output file.

Organization File

Field Name	Field Value	Comments
Organization code	Z70-VENDOR-CODE	Mapped
Organization name	Z70-VENDOR-NAME	Mapped
Alternate name 1	Possible values are: - Empty - Vendor name defined in the first occurrence of Z72-VENDOR-ADDRESS	Mapped if value is different than Z70-VENDOR-NAME

Alternate name 2	Empty	No match in Aleph
Alternate name 3	Empty	No match in Aleph
Active	Yes	Default value
Street*	Z72-VENDOR-ADDRESS	Mapped
City*	Z72-VENDOR-CITY	Mapped
State/Province*	Z72-VENDOR-STATE	Mapped
Country*	Z72-VENDOR-COUNTRY	Mapped
Postal code*	Z72-VENDOR-POSTAL-CODE	Mapped
Organization role	Vendor	Verde assigns the default organization role **Vendor**
Role note	Empty	No match in Aleph

Organization Contact File

Field Name	Field Value	Comments
Organization code	Z70-VENDOR-CODE	Mapped
Contact name	Z70-CONTACT-[1-5]	Mapped
Job title	Empty	No match in Aleph
Email	"Please insert e-mail"	The field is a mandatory in Verde but does not exist in Aleph. Verde therefore inserts the sample value.
Phone No.	Empty	No match in Aleph
Alternate phone No.	Empty	No match in Aleph
Fax No.	Empty	No match in Aleph
Street	Empty	No match in Aleph
City	Empty	No match in Aleph
State/Province	Empty	No match in Aleph
Country	Empty	No match in Aleph
Postal code	Empty	No match in Aleph
Main contact	No	No match in Aleph
Contact role	Other	No match in Aleph
Contact role note	Empty	No match in Aleph

Step 3. Loading the Converted Files to Verde

The converted files are saved on the Verde server. You can view the full path in the Summary report (**View Loader Output > Aleph Vendors Converter**). These files are ready to be loaded using the Verde organization and organization contact loaders.

To load the converted organization files:

1   From the **Select a tool** drop-down list, select **View Loader Output**.

2   Select the Aleph Vendor Converter.

3   Open the Aleph Vendor Converter summary and output file.

4   Copy the created organization output file path from the summary.

Note: It is recommended that you review the converted file before loading it. Note that the conversion status for each vendor is presented in the converter output file.

5   From the **Select a tool** drop-down list, select **Loader**.

6   In the **Loader** menu, select **Organizations**.

7   Upload the input file.

For more information about the organization loader, refer to the "Organization and Organization Contact Input Files" section of the *Verde Staff User's Guide*.

To load the converted organization contact files:

1   From the **Select a tool** drop-down list, select **View Loader Output**.

2   Select the Aleph Vendor Converter.

3   Open the Aleph Vendor Converter summary and output file.

4   Copy the created organization contact output file path from the summary.

Note: It is recommended that you review the converted file before loading and editing it (for example, inserting the contact's e-mail, which does not exist in Aleph, but is mandatory in Verde). Note that the conversion status of each vendor contact is presented in the converter output file.

5   From the **Select a tool** drop-down list, select **Loader**.

6   In the **Loader** menu, select **Organization Contacts**.

7   Upload the input file.

For more information about the organization contact loader, refer to the "Organization and Organization Contact Input Files" section of the *Verde Staff User's Guide*.

3

Online Interaction

Aleph and Verde offer a number of different navigation options to move from one system to the other and to display information from one system in the other.

Aleph to Verde Online Interaction

There are two types of online services offered in Aleph:

- **Ask Verde** - Aleph queries Verde. Verde provides answers in XML/HTML format.

- **Jump to Verde** (defined as Verde Admin in Aleph) is a service that triggers the following actions from Aleph:

  - Verde session is activated

  - Verde data elements related to the record opened in Aleph are retrieved and displayed. This means that the user can update and submit changes to a record in Verde while working in Aleph. Note that this activation is dependent on the relevant password definitions being defined in the Aleph server `verde_variables` table. For more information, see .

Ask Verde and Jump to Verde retrieve e-products according to the following rules:

- If Aleph is connected to a single Verde instance, Jump to Verde activates a **Find local** search. Note that Ask Verde retrieves only active e-products.

- If Aleph is connected to a Verde consortium:
    - If the Verde user that is defined in Aleph has its own search profile, active e-products are retrieved according to the search profile. For more information about Verde users, see <u>Setting Up a Staff User (from Aleph to Verde)</u> on page <u>43</u>.
    - If there is no search profile assigned to the user, Ask Verde and Jump to Verde retrieve active e-products according to the default search parameters. The default search parameters are as follows:
        - For the central instance in the consortium: Managed for all
        - For a local instance in the consortium: Searches e-products that the current instance manages for itself as well as those that the central instance manages for the local instance
        - For an instance in a multi-instance, non-shared environment: Searches in the current instance

These services can be activated either from the Cataloging or Acquisitions client.

It is possible to establish online interaction between Verde and Aleph if the Aleph record has one of the following data elements:

- An ERM ID that matches the Verde acquisition number (Aleph Acquisitions/Serials module only)
- A Verde purchase order number (Aleph Acquisitions/Serials module only)
- A valid value in the VRD field in the Aleph bibliographic record that matches the Verde e-product code
- A valid SFX ID in the SFX field in the Aleph bibliographic record that matches the SFX internal ID
- ISSN/e-ISSN
- ISBN/e-ISBN
- Title (245 MARC field)

Ask Verde

To run Ask Verde:

1   Retrieve and display a bibliographic record or an order record in Aleph – either from the Cataloging (bibliographic record) or from the Acquisitions client (order).

2   From the **Aleph** menu, select **External Services => Verde**. A Web browser with the equivalent Verde entity is displayed.

Rules for retrieval are as follows. If a field is present but a match is not found for it, an alternate field is searched. For example, if there is an ERM ID and a title and the ERM ID does not match a Verde acquisition number, then the title will be searched.

- ERM ID => single acquisition record

- Order number => single acquisition record

- VRD ID => single e-product record

- SFX ID => single e-product record

- ISSN/e-ISSN/ISBN/e-ISBN => work record with a list of active e-products

- Title => work record with a list of active e-products

Ask Verde from Acquisitions Module

In the example below, the ERM ID of an Aleph record matches the Verde acquisition number:
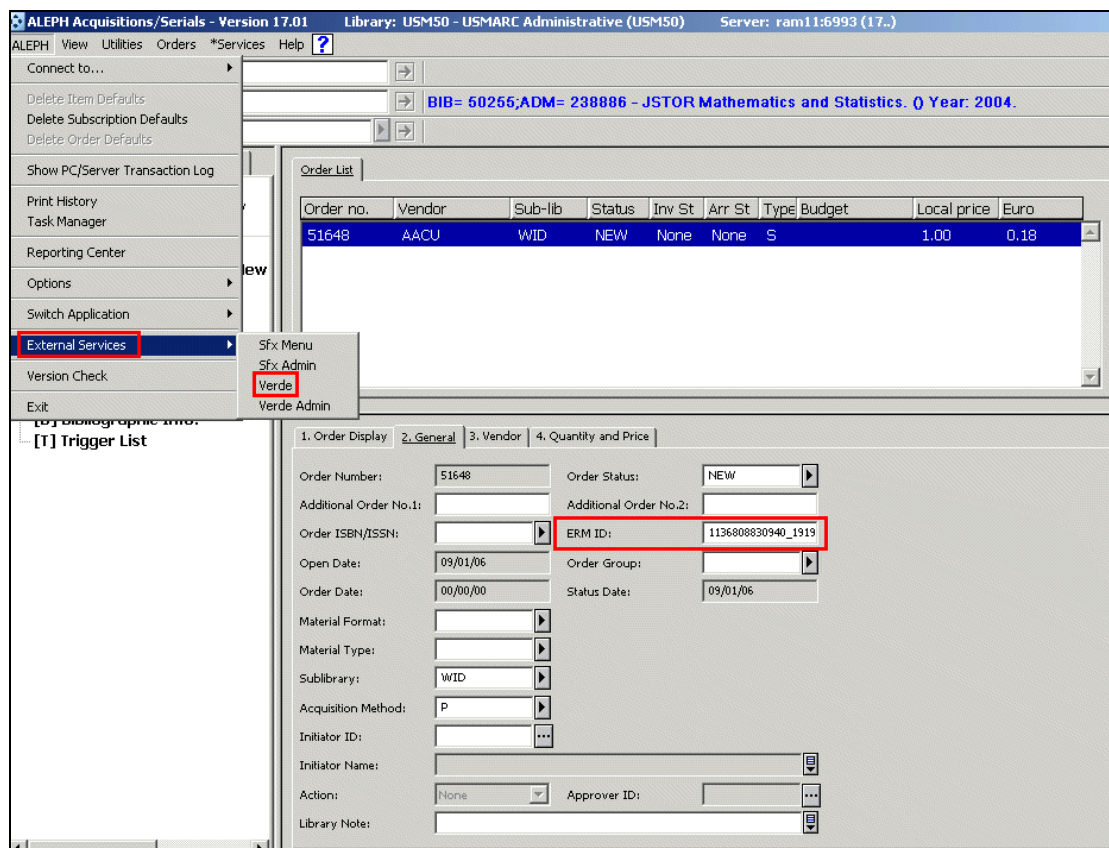

Figure 9. Aleph -> External Services -> Verde

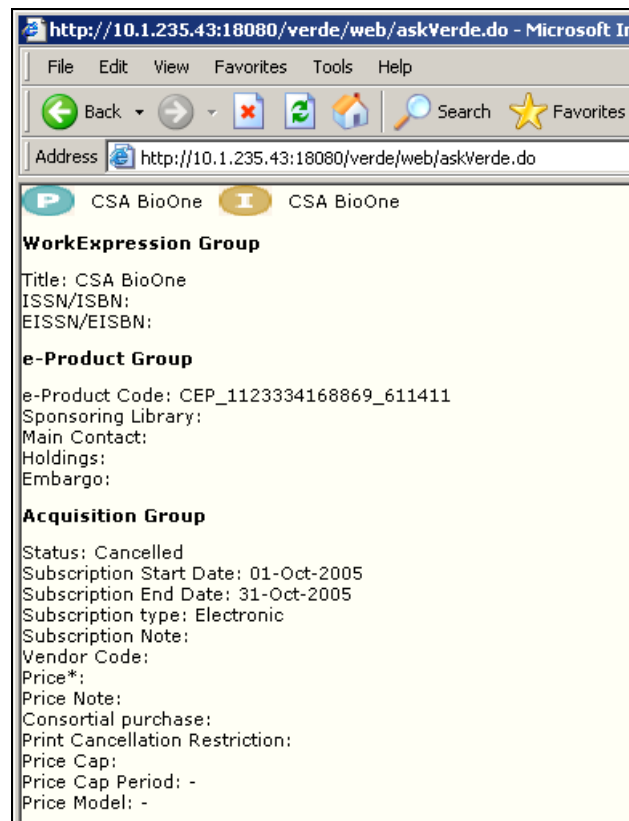A Web browser window opens, displaying the details of the Verde acquisition record:

Figure 10. Verde Acquisition Record Details

Ask Verde from Cataloging Module

In the example below, the VRD value of Aleph record matches Verde e-product code:
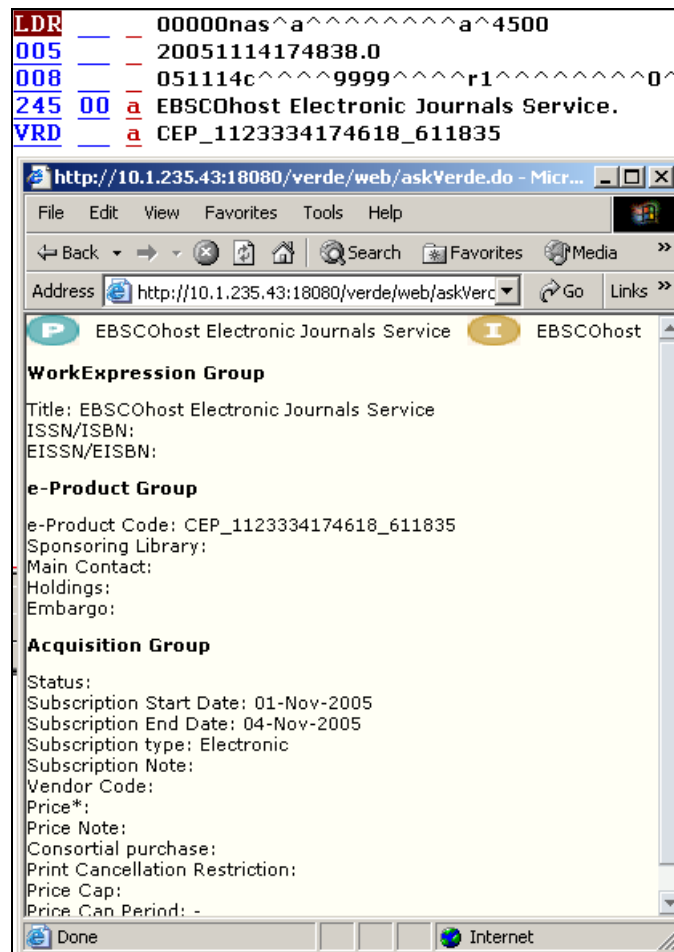

Figure 11. Ask Verde from Cataloging Module

Further Options for Displaying Verde e-Product Information from Aleph

If the library wants to manage the acquisition of e-resources in Aleph, it is necessary to create dummy bibliographic records for those resources not already represented in Aleph. These bibliographic records are required in order to associate them with acquisition records.

One of the possibilities of establishing online interaction between Verde and Aleph is to catalog the Verde e-product code in the Aleph **VRD $$a** field. (Note that even though this field might not be defined in the list of Aleph cataloging tags, it can still be used for this linking process.)

To catalog the Verde e-product code in the Aleph VRD$$a field:

1   Search for and display the relevant Verde e-product.

2   Switch to the **Interoperability** tab.

3   Copy or make a note of the e-product code.

Figure 12. e-Product Code

4   Create a new bibliographic record or edit an existing one. Enter the title of the e-product in the **Title** field, and the Verde e-product code in the **Aleph VRD** field.

Figure 13. Aleph VRD Field

After this step is completed, the link between Aleph and the Verde e-product record is established.

Note: Dummy bibliographic records can be suppressed from view in the OPAC by using the **STA (Status)** field with the text **SUPRESSED**.

Jump to Verde (Verde Admin)

The Jump to Verde functionality in Aleph will:

■   Open an active Verde session

■   Retrieve and display the data elements of the record that is open in the Aleph client

To use Jump to Verde:

1   From the Aleph Acquisitions/Serials or Cataloging client, retrieve and display an order or a bibliographic record.

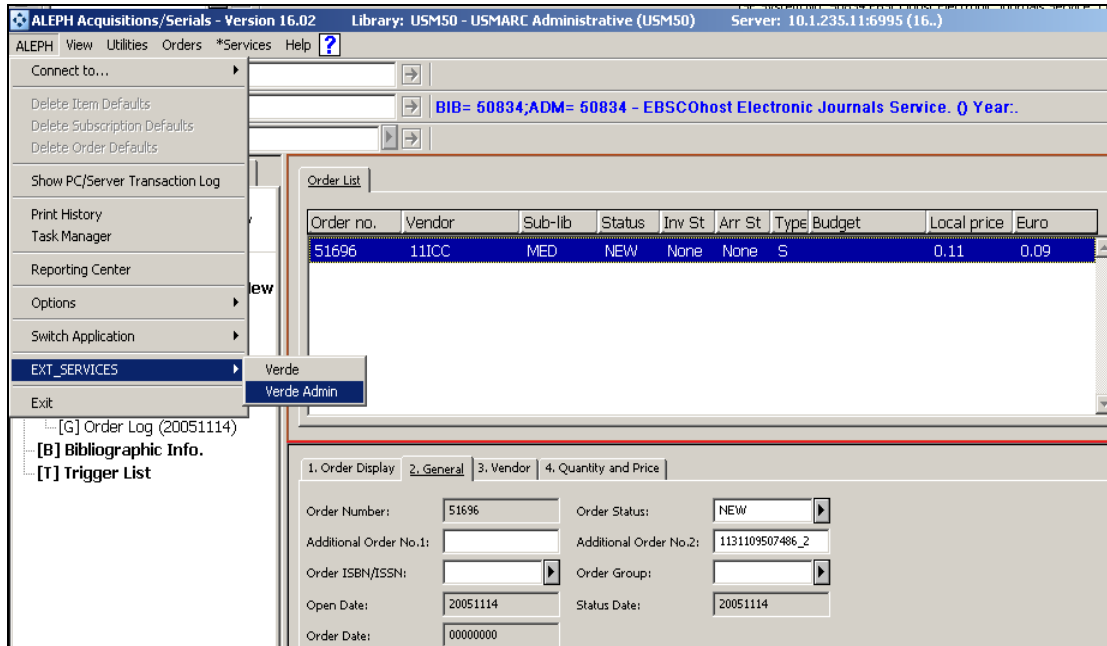**2**   From the **Aleph** menu, select **EXT_SERVICES => Verde Admin**.

Figure 14. Aleph -> EXT_SERVICES -> Verde Admin

The system opens an active Verde session and retrieves the relevant record.

If multiple e-products are found, Verde will open a results screen, and you can choose the relevant e-product.

If a matching record is found, a Web browser window opens, displaying the following:

Figure 15. Matching Record Found

Verde to Aleph – Online Interactions

Three types of online services are available in Verde in order to provide Verde to Aleph communication:

- Ask Aleph – Retrieves information of Aleph orders in XML/HTML format to be displayed in Verde.

- Create Aleph Bibliographic and Order Records – Creates Aleph bibliographic and order records directly from Verde, based on information in the Verde acquisition record

- Cancel Aleph Order – Cancels Aleph order records and sends a cancellation message.

Displaying Aleph Acquisition Data

It is possible to display Aleph acquisition data when Verde has a valid Aleph order number in the **Purchase order number** field. The Aleph order and auxiliary information (vendor, invoice, budget) will be displayed.

To display Aleph acquisition data:

1   Create or retrieve an existing acquisition record in Verde.

2   Enter the Aleph purchase order number in the **Purchase order number** field and click **Submit**.

The Aleph icon appears next to the purchase order number. If the icon does not appear, the Aleph-Verde interaction needs to be set up.

3   Click the **Aleph** icon to display order details from Aleph:

Figure 16. Purchase Order Number

Creating an Aleph Bibliographic and Order Record

You can create an Aleph bibliographic and order record, based on information in the Verde record.

Note: This option is available only from Verde acquisition records for e-packages, e-standalones, and e-interfaces. It is not available for e-constituents and e-print.

To create an Aleph bibliographic and order record:

1   Create an acquisition record in Verde (confirm that the vendor selected in the Verde acquisition record is valid in Aleph). Fill in all relevant fields. Note that depending on how your Aleph installation is configured, the price and order group may or may not be required.

2   Click **Submit**. The Aleph button appears in the top-right corner of the screen.

3   Click the **Aleph** button. The **Create new order** button appears.
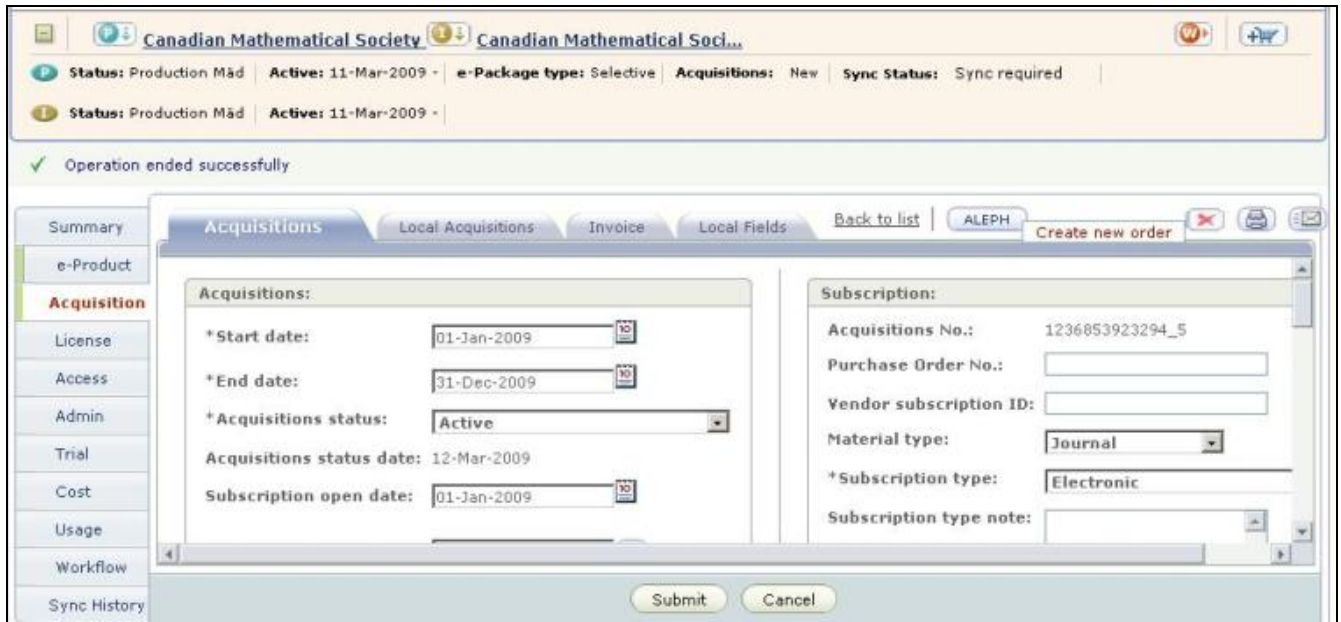
Figure 17. Create New Order Button

Note: The Aleph button with the **Create new order option** appears under the following circumstances: 1) Verde is configured to work with Aleph; 2) A vendor is defined for the acquisition record; 3) The **Purchase order number** field is empty; 4) The **Acquisition status** is not **Cancelled**.

---

4   Click **Create new order** to initiate a service that will create a new brief bibliographic serial record and order record in Aleph.

When the new order record is created in Aleph, its order number is inserted into the

Purchase order number field of the Verde acquisition record. An Aleph icon is displayed next to Purchase order number and the Aleph button disappears from the top-right corner of the screen.

5   Click the **Aleph** icon to display all the details of the newly created Aleph order in a Web browser window.

```
Order

System number: 50160
PO number: 51594
Additional order number 1:
Additional order number 2:
Open Date: 21/06/2006
Order Status: New
Status Date: 21/06/2006
Arrival Status:
Invoice Status:
Sub library: Main Library
Acquisition Method: Purchase
Order Date:
Material type: Serial
Library Note:
Vendor: 20CENTURY
Vendor Reference:
Vendor Note:
Quantity: 1
Quantity Note: 1
Unit Price: 100.00
Total Price: 100.00
Currency: US Dollar
List Price: 100.00
Terms Sign: -
Terms Percent: 0.00
Final Price: 100.00
Local Price: 100.00
Price Note:
Subscription Start: 20/06/2006
Subscription End: 20/06/2006
Renewal Date:
Budget Cycle: 1
Claim:
Vendor Contact:
Order Unit: Main Library
Material Format: ELC
Verde Acquisition Number: 1150875422703_29

Bibliographic description

ALEPH System number: 50160
Call number:
Author:
Title: EBSCOhost Academic Search Premier.
```

Figure 18. Newly Created Aleph Order Details

A new bibliographic record is created in Aleph, the **Title** field (245) is created from the Verde work expression title, and the **VRD** field is created from the Verde e-product code.

The data of the newly-created Aleph record contains four parts:

- Aleph-generated values

- Data transferred from Verde

- Hard-coded values

- Variable values

Canceling an Aleph Order

It is possible to cancel an Aleph order when Verde has a valid Aleph order number in the **Purchase order number** field.

For example, if the Verde record is updated to the order status **Cancelled** and a cancellation note is recorded, this information can be automatically updated in Aleph.

Note: This option is available only from Verde acquisition records for e-packages, e-standalones, and e-interfaces. It is not available for e-constituents and e-print.

To update an Aleph order via Verde:

1   Retrieve a Verde acquisition record and change the **Acquisition status** to **Cancelled**.

2   Enter relevant text in the **Note for ILS** field and click **Submit**. The **Aleph** button appears in the top-right corner of the screen.

3   Click the **Aleph** button. The **Cancel order** button appears.

Figure 19. Canceling an Aleph Order

Note: The Aleph button with the **Cancel order** option appears under the following circumstances: 1) Verde is configured to work with Aleph; 2) The **Purchase order number** field has a value; 3) The **Acquisition status** is **Cancelled**.

4   Click the **Cancel order** button. This automatically cancels the corresponding order in Aleph and inserts the **Note for ILS** in the Aleph order log.

5 In the Verde acquisition record, click the Aleph icon . The Aleph order details are displayed. The Aleph **Order Status** has been changed to **Library Cancelled**. In addition, the Aleph Order Status date is updated.

Figure 20. Order Status Date

In the Aleph record, an Acquisitions log entry is automatically created, recording the note from the Verde acquisition record.

Figure 21. Verde Acquisition Record Note

Aleph-Generated Values

Aleph generates the following values: `z68_doc_number`, `z68_sequence`, `z68_order_number`, and `z68_alpha`.

Data Transferred from Verde

When a new Aleph order record is created from Verde, the following fields are transferred from the Verde acquisition record to the new Aleph order:

▪ Order open date

- Order status date

- Vendor code

- Unit price value (is mapped to total price, list price, estimated price, and local price)

- Subscription valid from date

- Subscription valid to date

- ERM ID

Hard-Coded Values

The following values come from the program:

- Order acquisition method

- Order material type

They will always be:

- Acquisition method = Purchase   z68_method_of_acquisition = P

- Material type = Serial   z68_material_type = SE

Variable Values

- The Aleph table `verde_open_order` is used to configure mapping of Verde statuses to Aleph order statuses and Verde material formats to the Aleph ERM type. In addition, several constants can be configured, as explained below (the detailed explanation can be found in <u>Setup</u> on page <u>38</u>):

- Aleph Order group – `z68_order_group`

- Aleph Order sub-library – `z68_sub_library`

- Aleph ordering unit – `z68_ordering_unit`

4

Setup

In order for the online functions described above to work, Verde must point to Aleph and Aleph must point to Verde. In addition, the Aleph X-Server needs to be licensed and set up and the Verde server must have access to it.

Note: The batch functions described in <u>From Aleph to Verde – Batch Loads</u> on page <u>7</u> require manual FTP and thus do not require server configuration.

Configuring Verde to Point to Your Aleph Installation

The Verde test (TST) instance should point to an Aleph test installation. The Verde production instance should point to the Aleph production installation.

To activate this interaction, you will need the following information about the Aleph server:

- The IP of the Aleph server

- The Aleph HTTPD Port

- The code of the Aleph administrative library that contains the acquisition data held in the Verde instance

- An Aleph staff user name and password. This user must have WWW-X – X-Server Interface - VERDE - Get Order, VERDE - Update Order Status, and Verde-Open new Order privileges.

All this information is stored in a Verde database table.

To update the external links, use the External Services wizard that can be found in the Configuration tab of the Admin module.

The wizard allows you to configure parameters of external applications with which Verde communicates and the services used for the communication.

For detailed instructions, refer to the "Configuration Tab" section of the *Verde Staff User's Guide*.

Configuring Your Aleph Installation to Point to Verde

In order for your Aleph installation to work with Verde, you will need to ensure that Aleph is configured correctly and that the necessary service packs have been installed. Below, find information about setup common to Aleph versions 16, 17, and later.

The minimum required Aleph server configuration is as follows:

- **Aleph Service Packs**

  Make sure that your Aleph installation is on the following service pack levels:

  - Aleph500.16 – Service Pack: 1777

  - Aleph500.17 – Service Pack: 815

  - Aleph 500.18 – Service Pack: 330

- **Configuring Aleph for Verde**

  Configure Aleph so that it points to your Verde server.

  In the `$alephe_root/ aleph_start` and `$alephe_root/aleph_start.tml` files, enter the following:

  ```
  setenv verde_base_url
  http://servername:port/verde/web/askVerde.do
  ```

Note: The server name must correspond to the Verde server name. The port number must correspond to Verde HTTP port.

  In Aleph500.16, the ERM ID is stored in the **Order number 2** (z68_order_number_2) field. The following must be defined in the `$alephe_root/aleph_start` and `$alephe_root/aleph_start.tml` files:

  ```
  setenv verde_erm_id          z68_order_number_2
  ```

  After the above files have been modified, run the following command:

  ```
  >> cd $alephe_root
  >> source aleph_start
  ```

- **Server IP Allowed**

  The IP of your Verde server needs permission to use the X-Server. This can be configured in the `server.ip.allowed` table, which is located in the `alephe_tab` directory.

- **Password Authorization**

  To define permissions for a Verde user pointed to Aleph:

  a   Add the following lines to the `$alephe_tab/user_function.eng` file:

  - ```
    WWW-X  L X-SERVER Interface  VERDE-GET-ORDER  L VERDE – Get
    Order
    ```

  - ```
    WWW-X  L X-SERVER Interface  VERDE-UPD-ORDER  L VERDE – Update
    Order Status
    ```

  - ```
    WWW-X  L X-SERVER INTERFACE  VERDE-OPEN-ORDER L VERDE – Open
    new Order
    ```

  b   Confirm that there is a staff user called WWW-X. Give this user WWW-X - permissions to perform the following functions:

  - ```
    VERDE-GET-ORDER   (VERDE – Get Order)
    ```

  - ```
    VERDE-UPD-ORDER (VERDE – Update Order Status)
    ```

  - ```
    VERDE-OPEN-ORDER   (VERDE – Open New Order)
    ```

  The permissions must be set in your Aleph ADM library:
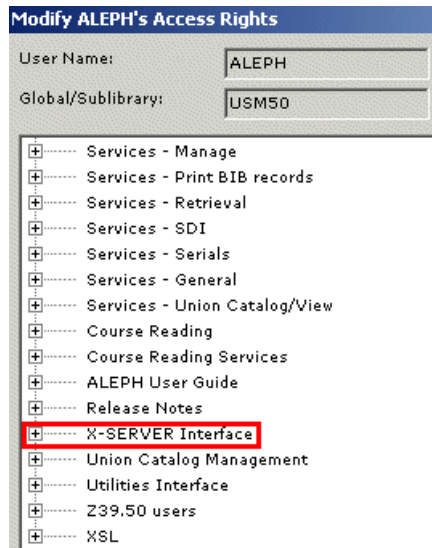
Figure 22. Setting Permissions in Aleph
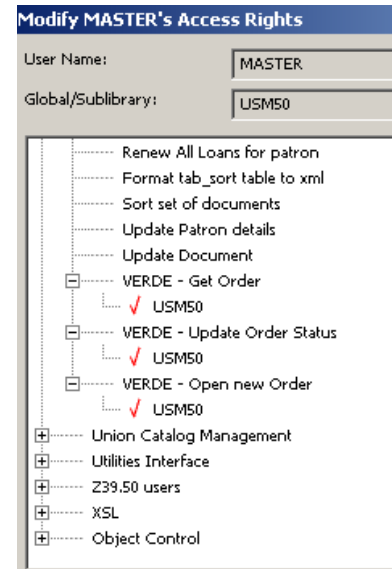
Figure 23. Setting Permissions in MASTER

- **pc_tab_exp_field.<lng>**

  To include the **ERM type** field in Acquisition reports (in Aleph 500 version 17 and later), add the following to the `./[adm_library]/tab/pc_tab_exp_field.<lng>` file:

  ```
  P-ACQ-02-01      L Erm type              011
  ```

- **verde_open_order**

  To open a new Aleph order from Verde, the `verde_open_order` table, located in the `$data_tab` directory of the administrative library, is checked by the system.

  The following parameters are defined in the `verde_open_order` table in ver.16.02:

  - Bibliographic library for the bibliographic record

  - Sub-library for the new order

  - Order-group for the new order

  - Whether or not to create the **STA $$aSUPPRESSED** field in the new bibliographic record

  - Ordering unit for the new order

  - Verde acquisition status

- Aleph order status based on the Verde acquisition record status

```
! 1       2       3       4   5           6           7
!!!!!-!!!!!-!!!!!!!!!!-!-!!!!!-!!!!!!!!!!!!!!!!-!!!
USM01 WID   XXX         Y WID01 PROC1           PS
                                PROC2           PS
                                PROC3           PS
                                APPROVED        RSV
                                DENIED          DNB
                                ACTIVE          SV
                                RENEWED         SV
                                CANCELLED       CLS
                                NEW             NEW
                                REVIEW          SV
```

In ver.17.01 and later, columns 8 and 9 were added:

- Verde material format

- Aleph ERM type, based on the Verde material format

```
! 1       2       3       4   5           6           7           8
9
!!!!!-!!!!!-!!!!!!!!!!-!-!!!!!-!!!!!!!!!!!!!!!!-!!!-
!!!!!!!!!!!!!!!!-!!!
USM01 WID   XXX         Y WID   PROC1           PS  EMPTY
ELC

                                PROC2           PC  SE
ELC

                                PROC3           PS  AI_DB
ELC

                                APPROVED        RSV ARTICLE_DB
ELC

                                DENIED          DNB JOURNAL
ELC

                                ACTIVE          SV  EBOOK
ELC

                                RENEWED         SV
                                CANCELLED       CLS
                                NEW             NEW
                                REVIEW          SV
```

It is possible to define different verde_open_order tables (in the ADM library) for different Verde instances.

This can be done by adding the user name sent by Verde to the X-Service as a suffix to the table name.

For example, if **VERDE-USER** is defined in the `EXTERNALSERVICEINFO` Oracle table as the instance user responsible for communication with the Aleph X-Service, you would define the following table in the ADM library:

```
verde_open_order. verde-user
```

Note: The table name suffix should be added in lower case.

- **pc_tab_acq_fast_cat.<lng>**

  Before creating bibliographic and ADM records, the system checks the `pc_tab_acq_fast_cat` table (located in `$data_tab` directory of both bibliographic and ADM libraries).

  If there are mandatory fields based on these tables and these fields are not populated during bibliographic record creation, records are not created and error messages are sent.

  If the `pc_tab_acq_fast_cat.eng` defines the **OWN** field as mandatory for the new bibliographic record, the **OWN** field will be created automatically using the **Z66-USER-OWN-CREATE** field of the Aleph staff user.

- **tab_tag_text**

  The system checks the definition of default tag values when creating new system records in the `tab_tag_text` table (located in the `$data_tab` directory of the bibliographic library).

  For example, LDR, 008, and other tags are taken from this table to the new SE record when creating a new Aleph bibliographic and order record on the basis of a Verde acquisition record.

  ```
  !!!-!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!>
  LDR SE ^^^^^^a^^^22^^^^^^^^4500
  008 SE ^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^eng^^
  ```

- **/alephe/www_f_eng**

  Add the following HTML file to `./alephe/www_f_eng`:

  ```
  verde-redirect
  ```

Setting Up a Staff User (from Aleph to Verde)

Note: This feature is optional and is implemented differently in different Aleph versions.

You can define a Verde user name and password in Aleph for each staff user that is to be used when this staff user runs the Ask Verde and Jump to Verde (Verde Admin) services.

To implement this feature:

- If you are working with versions 16.02, 18.01, or 19.01, follow the instructions in the [Versions 16.02, 18.01, and 19.01](#) section below.

- If you are working with version 17.01, follow the instructions in the [Version 17.01](#) section below.

After making the various file changes described in these sections, restart the Web and client servers using UTIL W/3/1 and UTIL W/3/3.

If you choose not to implement this feature and are working with version 16.02 or 18.01, the system will use the `$data_tab/verde_variables` table, as described in the [Version 17.01](#) section below. (If you choose not to implement this feature and are working with version 19, the feature will simply not be implemented).

Versions 16.02, 18.01, and 19.01

You can define a separate user name and password for each user so that a user will be connected to the user's default instance in Verde with the user's own Verde permissions. The login information is stored in the `Z660-ERM-USER` and `Z660-ERM-PASSWORD`. The fields are updated in the staff permissions update window:

Version 16.02

Versions 18.01 and 19.01

A new table - Z660 - has been added (in addition to Z66) to be used by external ERM systems in Aleph versions 16.02 and 18.01.

Note: In Aleph version 19 and later, the Verde user name and password are defined separately for each user. The `verde_variables` table and `z660` Oracle table are not in use in this version.

To implement the Z660 table:

1 In the `./[usr_library]/file_list`, add the following two lines:

```
TAB z660              100K           100K           ts0

IND z660_id           100K           100K           ts1
```

2 Use UTIL A/17/1 in each `usr_library` to create the Z660 table and its index.

3 In the `.\acq\tab\ext_srv.ini` PC file, add the following two lines (note that the lines are different from the existing lines):

```
Verde = {server_address}?func=service-verde-
acq&doc_library={doc_library}&doc_number={doc_number}&order_sequence
={order_sequence}&user_code={user_code}&admin_flag=N

Verde Admin = {server_address}?func=service-verde-
acq&doc_library={doc_library}&doc_number={doc_number}&order_sequence
={order_sequence}&user_code={user_code}&admin_flag=Y
```

4 In the `.\cat\tab\ext_srv.ini` PC file, add the following two lines (note that the lines are different from the existing lines):

```
Verde = {server_address}?func=service-verde-
cat&doc_library={doc_library}&doc_number={doc_number}&user_code={use
r_code}&adm_library={adm_library}&admin_flag=N
```

```
Verde Admin = {server_address}?func=service-verde-
cat&doc_library={doc_library}&doc_number={doc_number}&user_code={use
r_code}&adm_library={adm_library}&admin_flag=Y
```

5 In the `./alephe/error_eng/pc_admin_c0602` file, add the following error message:

```
0300 0011 L ERM Not supported.
```

Version 17.01

In Aleph version 17.01, the Verde user name and password are defined in the `verde_variables` table only.

You create or edit the `verde_variables` table in the `tab` directory of your ADM library as follows:

```
COL  1.     Constant for which value is given (30)
COL  2.  Value (100)
USER-NAME                      demoverde
USER-PASSWORD                  123456
```

This table contains the Verde user name and password that will be used for the Ask Verde and Jump to Verde (Verde Admin) services and must be configured for each ADM library on your server. The Verde user should be set up so that it has privileges for the Verde instance that corresponds to your Aleph ADM library.

Note: In standard Aleph and Verde installations, there will be a single ADM library and a single Verde local instance. In consortia and multi-ADM installations, there may be multiple ADMs and multiple instances.

Aleph Client Configuration

Note: This section applies to Aleph version 16 only and should be ignored by customers using version 17 and later.

Aleph version 16 sites must install new Acquisitions and Cataloging clients in order to enable online interoperability with Verde.

You will find the following new client files in the `tar` file:

`./aleph/pc_exe/version/catalog/tab/Ext_Srv.ini`

`./aleph/pc_exe/version/catalog/bin/Catalog.exe`

`./aleph/pc_exe/version/acq/tab/Ext_Srv.ini`

`./aleph/pc_exe/version/acq/bin/Acq.exe`

The following additional modifications need to be made in the following menu files:

```
\acq\Tab\Eng\MENU.DAT
\cat\Tab\Eng\MENU.DAT
```

Add the next line:

```
EXT_SERVICES                          External Services
```

If a customer has the following definition in the `aleph_start` client configuration file:

```
setenv verde_erm_id     z68_order_number_2
```

then a change needs to be made in the `\Acq\Tab\Eng\window.dat` PC file.

The following line should be changed from:

```
OrderForm.Static.OrderNo2             Additional Order No.2:
```

to:

```
OrderForm.Static.OrderNo2             Erm ID:
```