



Web Self Check – Aleph version 18 and higher

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1 Preliminaries

The Web Self-check in Aleph enables patrons to borrow media outside the opening hours of the library. Every workstation that is connected to the internet can be used for checking out media via the OPAC. This includes media from the library (open access, reserve collection etc.) as well as media temporarily borrowed from a colleague's office. The Web Self-check does not include a connection to a book-protection but patrons may use this function voluntarily. The loan transactions will be charged directly to the patrons' accounts. Thus, the staff member in the library can easily find out who has borrowed a requested medium.

The Web Self-check does not include return functions. It is based on the implemented functions for connection of self-check machines (SIP2).

The Web Self-check is an add-on, which is available for costs. If you want to use this feature, but haven't purchased it yet, please contact Ex Libris or your distributor.

2 Functionality

The self-check is an additional item in the OPAC's main menu. It will be available after the patron's proper authentication. Users who are logged in as guests cannot use the self-check function.

2.1 Patron registration and authorisation

Patrons can register to the web-based self-check using the standard registration of the OPAC. The function 'Self-check' can only be used if the patron is authorised. Authorisation depends on the patron status. All patron statuses which get authorisation are listed in the table *\$alephe_root/www_server.conf* (see below).

2.2 Borrowing process

As in the borrowing process in the circulation module, the self-check of an item by using the OPAC requires a unique identification. Depending on the system settings, this may be the barcode or the location of the item. The patron's identification is submitted to the system when the patron logs on and does not need to be entered again. Barcode or location may be entered either manually or – depending on the configuration of the workstation – by means of a barcode scanner. The medium's brief record will be displayed to the patron for confirmation. This is meant to prevent false entries caused by typos, especially when the item ID is entered manually.

Each loan is sent to the system separately.

The borrowing passes several configurable check routines, which leads – depending on the result – to a successful loan or to a termination of the process. A successful loan will be immediately visible on the patron's loan account.

The borrowing result – loan or termination – will be displayed on the patron's screen. Acoustic signals are not supported by Web Self-check.

2.3 Onward loans incl. automatic return

When an item is being loaned, and the system detects that the item is currently on loan, the item may be automatically returned (depending on the system settings, see below). In case of an automatic return, a return receipt (e-mail or printout) will be generated for the primary borrower. If there is no e-mail address defined for the primary borrower, the print file will be placed on the server by a staff member. This file contains a configurable print ID (see below).

Additionally, the primary borrower's identification and the primary expiration date will be transferred to a note field of the current loan. Hereby the librarian has the necessary information in order to return the material to the primary patron's account and forward the material to him when the medium will be returned. The former expiration date indicates whether it is a regular or a permanent loan.

If the current borrower is identical to the former borrower, either a renewal will be processed or the borrowing process will be aborted. This depends on the system's configuration.

The Web Self-check does not include a return function. A return may need post processing which has to be done by a staff member of the library (e.g. hold request filled for medium, medium shall be loaned for the primary borrower again).

2.4 Check routines and messages

The check routines for the Web Self-check are identical to the routines used for the self-check machines (SIP2). A library which uses both a self-check machine and the web-based self-check, cannot define different check routines for both functions.

If no item exists for the barcode or call number, the loan will be terminated immediately. The barcode or call number must be entered again. If the self-check was cancelled because of other reasons, appropriate error messages are displayed. A confirmation message appears if the loan was successfully processed.

3 Configuration

The following areas need to be set up for web-based self-check:

- HTML-files for the display in the OPAC
- Configuration tables
- Message texts
- Printing forms

3.1 HTML-files

The following HTML-files have been added for the web-based self-check. Please copy these files from the directory *\$aleph_dev/alephe/www_f_lng* to your active u-tree if necessary.

- self-check-body
- self-check-confirm
- self-check-head
- self-check-tail

Please add the menu item 'Self-check' to the following files. The hyperlink must point to the following function name: "&server_f?func=self-check-0".

- head-1-bor
- head-1-nobor
- head-replace

3.2 \$alephe_root/www_server.conf

These parameters are used by Web Self-check. Please add them to *\$alephe_root/www_server.conf*:

Parameter	Assignment
www_selfcheck_allowed	Status of users who are allowed to use the self-check. The statuses are listed in quotation marks. Multiple statuses are separated with commas. The entry „,##“ opens the self-check for all statuses.
www_selfcheck_circ_ok	Defines, whether an automatic return and loan are processed for the current user, if an already borrowed medium is booked by self-check. Assignment: Y=Yes or N=No If the parameter is not set, the default value is N=No.
www_selfcheck_form_no	Only relevant, if www_selfcheck_circ_ok is activated: Form for generating return receipts (e.g. 00)
www_selfcheck_print_id	Only relevant, if www_selfcheck_circ_ok is activated: in case, there is no e-mail address from the former borrower, a print file with the return receipt for the stated print-ID is generated.

Example:

```
...
setenv www_selfcheck_allowed      "01", "02", "03"
setenv www_selfcheck_circ_ok      Y
setenv www_selfcheck_print_id     self
...
```

3.3 \$alephe_tab/www_tab_self_check

This table includes definitions which IP addresses (e.g. only internal terminals) are allowed to use self-check. In addition, the self-check can be limited to media of certain sublibraries. Please copy this table from *\$aleph_dev/alephe/tab* to your u-tree.

```
!          1          2  3          4          5          6          7
!!!!!!!!!!!!!!!!!!!!!!!!!!!!-!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!>
*.*.*.*          1 #####
                2
```

Structure of the table:

- Column 1: Attribute identification
- Enter ip address identification where self-check is allowed
- Column 2: Attribute type
- Always „1“ = item can be checked-out.
- Column 3-7: Sub-library of the items which may be loaned by using Web Self-check

3.4 \$data_tab/tab_check_circ (ADM library)

The defined check routines for LOAN and SIP-LOAN will be processed (as in the SIP2-Server). Please define check routines for SIP-LOAN only if they are not already defined for LOAN.

3.5 Printing forms

If the automatic return function is enabled for the self-check, the primary borrower receives a return receipt when a medium held by him is booked by another user. This receipt will be generated based on the form „return-receipt-00“. By default, the print-file will be saved on the server with the following name: „auto-return-letter_<date>_<time>“.

Automated printing or sending by e-mail of return receipts

If return receipts should automatically be printed or sent by e-mail, the print files generated on the server have to be processed using the Print daemon of the ALEPH client.

The Print daemon identifies the print files with their assigned Print ID. The Print ID is defined by the parameter „www_selfcheck_print_id“ in \$alephe_root/www_server.conf (see above).

The following three steps are necessary to set up the Print daemon:

1. Entering the Print ID

The Print ID in use has to be entered to the Task Manager. In the Task Manager choose the "Print Daemon" tab and click the button "Setup". The "Print ID Setup" window pops up and displays a list of existing Print IDs. Enter the new Print ID to the corresponding field and click the button "New" to add your entry to the list.

2. Setting up the Print daemon

The "Print Daemon" tab consists of two panes. The upper pane displays a list of all print IDs that were entered while the lower pane displays a list of all libraries that can be used in the Task Manager. Check the print IDs and the libraries that the print daemon shall process.

3. Starting and stopping the print daemon

The print daemon may be started manually by clicking the button "Activate" in the "Print Daemon" tab. The button's label changes to "Deactivate". Once the print daemon was started it will regularly check the print directories of the libraries the daemon was set up for. If the daemon finds an adequate file in one of the directories, the file will be transmitted to the client and printed.