Staff User's Guide – Printing

Version 22

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1 General

1.1 Print Workflow

Printing in ALEPH is generated by one of the following actions:

- Clicking the Print button in a GUI window;

- Pressing F11 when a list (for example, the Search list of headings, the Acquisitions list of orders) is in focus;

- Performing a transaction that triggers printing;

- Running a service that produces printouts such as reports and call slips.

1.2 Print Mode

Determine the mode to be used when generating printouts by right-clicking the Printer icon:

at the right bottom corner of your screen and selecting an option from the list.
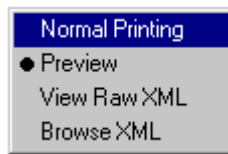
Normal Printing
When Normal Printing is selected, the system sends the output to a printer. Depending on the print setup of the workstation, the Print window displays, or the output is sent directly to the printer.

Preview
When Preview is selected, the output displays in a Preview window. You can then click Print in the Preview window to print the file.

A printout which is intended for dispatch by e-mail cannot be sent from the Preview window. The printout must be recalled, with the mode set to Normal printing.

View Raw XML
When this option is selected, the output displays in raw XML format in an editor window. This mode displays the data before it is filtered and formatted for printing. Therefore, it can be useful for debugging and for adjusting print templates.

Browse XML
Similar to View Raw XML, when this option is selected, the output displays in raw XML format in the Browser window. This mode displays the data before it is filtered

and formatted for printing. Therefore, it can be useful for debugging and for adjusting print templates.

Browse HTML
When this option is selected, the output is displayed in HTML format in the Browser window.

2   Template Printing

Template printing refers to a method that uses predefined templates and merges them with the appropriate data to create a printout.

A print template contains placeholders for data and text.

Example
The Payments Received report is generated using the Circulation service Payments Received Report (cash-03):

In this example there are five printout formats to choose from. When the second format is selected from the Report Format drop-down list,

the printout (shown here in Preview mode) looks like this:

09/07/2013
payment-received-report-01

Payments Received Report

From: 09/06/2013
To: 09/07/2013
Sort By: Sublibrary

Patron ID	PC-Station IP	Date	Receipt No.	Type of Transaction	Credit	Debit
ID362	10.1.116.55	09/06/2013	898	Local Patron Registration		5.00
				Summary	0.00	5.00
				Balance (ALEPH)		5.00
ID362	10.1.116.55	09/06/2013	898	Local Patron Registration		5.00
00000012	10.1.116.36	10/06/2013	900	Late return		0.00
00000012	10.1.116.36	10/06/2013	900	Renewal		0.50
00000012	10.1.116.36	10/06/2013	900	Renewal		0.50
00000012	10.1.116.36	10/06/2013	900	Renewal		0.50
00000012	10.1.116.36	10/06/2013	900	Renewal		0.50
00000012	10.1.116.36	10/06/2013	900	Hold request		3.00
				Summary	0.00	10.00
				Balance (HYL)		10.00
00000012	10.1.116.36	10/06/2013	900	ILL request		3.00
00000012	10.1.116.36	10/06/2013	900	ILL request		3.00
00000012	10.1.116.36	10/06/2013	900	ILL request		3.00
00000012	10.1.116.36	10/06/2013	900	ILL request		3.00
00000012	10.1.116.36	10/06/2013	900	ILL request		3.00

When the fourth format is selected,

The printout (shown here in Preview mode) looks like this:

Payments Received Report

09/07/2013
payment-received-report-02

From: 09/06/2013
To: 09/07/2013
Sort By: Sublibrary

Date	Receipt No.	Type of Transaction	Credit	Debit
09/06/2013	898	Local Patron Registration		5.00
		Summary	0.00	5.00
		Balance (ALEPH)		5.00
09/06/2013	898	Local Patron Registration		5.00
10/06/2013	900	Late return		0.00
10/06/2013	900	Renewal		0.50
10/06/2013	900	Renewal		0.50
10/06/2013	900	Renewal		0.50
10/06/2013	900	Renewal		0.50
10/06/2013	900	Hold request		3.00
		Summary	0.00	10.00
		Balance (HYL)		10.00
10/06/2013	900	ILL request		3.00
10/06/2013	900	ILL request		3.00
10/06/2013	900	ILL request		3.00
10/06/2013	900	ILL request		3.00
10/06/2013	900	ILL request		3.00
10/06/2013	900	ILL request		3.00

2.1   Customizing Printouts

See the document Customizing Printouts (XML and XSL), available in the Ex Libris
Documentation Center for a complete guide to working with print templates.

3   E-Mail

3.1   Definitions for E-Mail Printouts

All of the following definitions must be set for each printout that is being sent by e-
mail.

3.1.1   Set Column 4 in the Module's print.ini File to M or B

Each module's `print.ini` file is located in the directory `<module>/Tab`. For example
`Circ/Tab/print.ini`:

```
!-----------------------------------------------------------------
!
! 1 - function name
! 2 - version ID (00-99)
! 3 - display Print Setup window (Y/N)
! 4 - mail default (M-Email/P-Print/B-Both)
! 5 - local filename
! 6.1-6.10 - print ID (offline printing/printer dispatching) -
optional
!
!      1            2 3 4      5            6.1        6.2
!----------------+-+++----------+---------+---------+-

LoanReceipt        00 N P loanrcpt.prn
```

```
PhotoWait            00 Y M photowt.prn
PhotoSlip            00 Y P photoslp.prn
PhotoLetter          00 Y M photoltr.prn
ReturnReceipt        00 N P retrcpt.prn
ReturnPhoto          00 Y P retphoto.prn
LostMaterialBill     00 Y B lostbill.prn
```

Column 4 defines whether the file will be printed (P), sent by e-mail (M), or both (B).

3.1.2 Define an XML Translation File with the form-print-method Tag and EMAIL Type

Print templates that produce e-mail messages must have the following line present in the relevant `trn` translation file in the library's `form_lng` directory:

```
!Tag                    Type      S Parameters
!!!!!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!-!-!!!!!!!!!!!!!!!!!!!->
form-print-method       EMAIL     S
```

It is sufficient to define this line in the `global.trn` file. In this case, every printout that has a related e-mail address (for example, patrons, vendors), will automatically send a message by e-mail if possible.

3.1.3 Define "Mail" Print Templates for Print Forms that Use Different Text for E-mail Messages

Regularly, when a letter or a report is sent in the body of an e-mail as plain text, the text will be formatted based on the regular HTML-formatted template, so that the e-mail body text resembled the HTML-formatted output. However, sometimes different text is required for an e-mail message.

If you wish to have a separate template for body e-mails, copy each relevant template file to an additional file named `plain-<template file name>`. For example, copy `acq-order-claim-01.xsl` to `plain-acq-order-claim-01.xsl`. Change the third line in the file from

```
<xsl:include href="funcs.xsl"/>
```

to

```
<xsl:include href="plain-funcs.xsl"/>
```

E-mail messages produced using these templates will be sent with the `plain-<template file name>` file's text in the message of the body.

3.1.4 Define E-mail Formats

E-mail messages can be sent with the report or the letter as HTML attachments or as plain texts within the e-mail body. If no HTML attachments are to be used, the system librarian can turn off this option system wide. If the system librarian has defined the system to allow HTML attachments, the options of using such attachments or using plain texts within the e-mail body depend on how the receiving patron or vendor has been defined. Refer to the Circulation and Acquisition chapters of the *Staff User's Guide* for information on patron and vendor definition.

3.1.5 Set the Printer Setting to Normal Printing

The printer setting can be set to Normal Printing in the GUI, or by setting it as the default in the alephcom.ini file.

In the GUI right click the printer icon ￪ on the action bar and select Normal Printing.
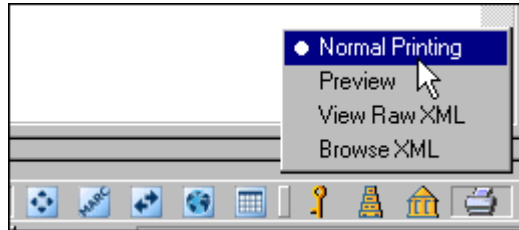
The default for the printing configuration is set in the client's alephcom/tab/alephcom.ini file in the [Main] section's `DefaultPrintConfig=0` parameter.

- 0 Normal Printing

- 1 Preview

- 2 View Raw XML

- 3 Browse XML

- 4 Browse HTML

Set DefaultPrintConfig to 0 in order to define Normal Printing as the default.

When using the Preview option for large files with more than five printouts, the dialog box with the question "You are going to Preview <n> additional documents with no option to stop the process. Continue Preview-yes/no?" is displayed. It is possible to continue or to stop the Preview process. The question is displayed after five printouts (by default) or the number set in Alephcom.ini:

```
[Print]
PreviewLimit=5
```

When printing or previewing wide tables, the table may be cut off. To avoid this problem, define the following parameter in .\Alephcom\Bin\HTMLPrint.ini:

```
[Options]
Scale=75
```

Scale=100 is the default
This change affects all printouts. There is no option to fit specific printout only.

3.1.6 Ensure the Patrons have Valid E-mail Addresses

Only patrons with a valid e-mail address can receive e-mail messages. The patron's e-mail address must be defined in the E-mail field of the Address Details tab (Patron tab / Patron Registration root /Address Information node).

3.1.7 Select the Send All Letters to Patron Check Box

The Send All Letters to Patron check box in the Global Patron Details tab (Patron tab / Patron Registration root / Global Patron Information node) must be checked.

3.2 Subject Line in e-mail Printouts

The subject line for e-mail printouts is set in the `form_description.<lng>` table in the relevant library's `/tab` directory. For example:

```
opac-print                    An OPAC printout sent to you
lost-material-summary         Summary Bill for Lost Material
item-sched-delete-letter-s    Advance Booking Cancellation Letter
```

The table includes the name of the form, the form format (optional, if left blank the entry applies to all formats), and the subject line text (up to 200 characters).

3.3 Sending Slips For Patrons with Valid e-Mail Addresses

Your system librarian can set up an option which allows sending slips/letters only to patrons who have a valid e-mail address. This option separates between slips that have an empty <email-address> tag in the XML file and slips where an e-mail address is present in the <email-address> tag.

4 Print History

All files that are printed in an ALEPH GUI module interface are saved in a "history" section in the operator's profile. The Print History function is used to view and/or reprint all files that were printed from the GUI.

Any printout that is generated online from a GUI window or service appears in the Print History of any module that is connected to the library in which the printout was created. For example, if a Hold Request Not Filled letter was printed when the GUI was connected to USM50, it will appear in the Print History of any module that is connected to USM50.

To access the print history function, from the menu bar, click **ALEPH**, then **Print History**. The Print History window opens:
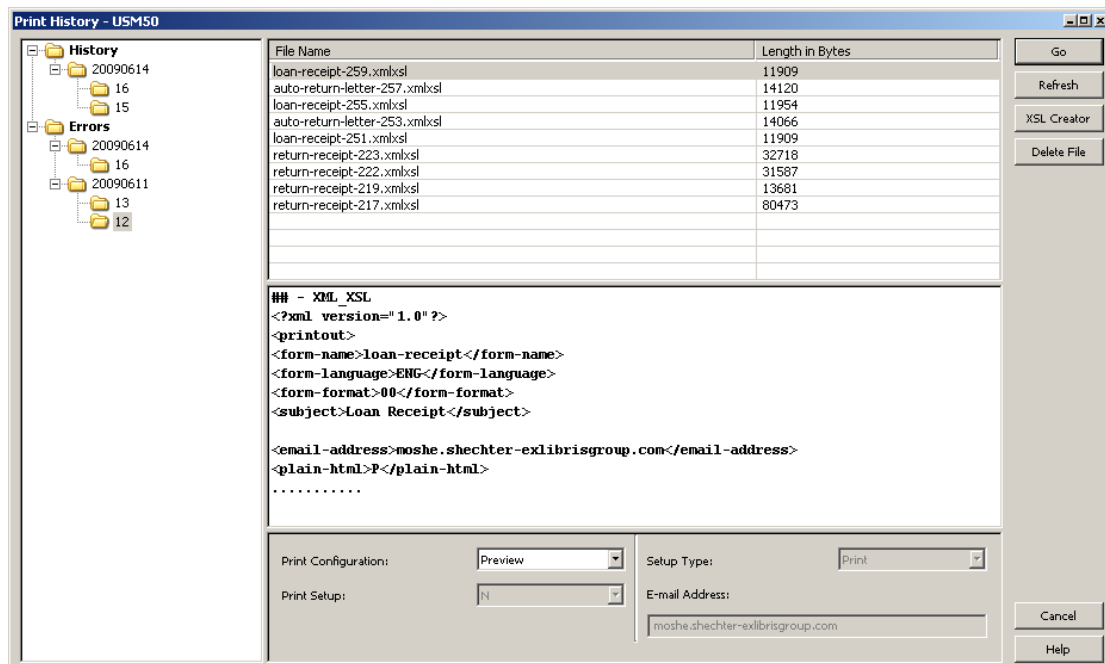
The left pane is a navigation tree that lists all the dates and rounded hours when files are printed. The pane is split into two main root nodes:

- History – lists all of the printout and e-mail attempts that were triggered from the local PC
- Mail Errors – lists e-mail attempts that failed for various reasons, such as invalid addresses or invalid e-mail server addresses. Note that if the e-mail address is valid but does not exist, it is not identified by the system as an error.

In both nodes, each day is a separate node, and each rounded hour is a separate subnode.

Highlight the relevant node to list the names of all the files that were produced in that time period.

The upper right pane lists each of the files and their size. Highlight a file on this list to see the beginning of its contents in XML format on the lower right pane.

Print Configuration

Select one of the following options and then click the Go button:

- Normal Printing: Print the file as it was originally printed.

- Preview: Preview the printout. You can then click Print to print the file.

- View Raw XML: View the file in raw XML format in an editor window. This mode can be used for debugging.

- Browse XML: View the file in raw XML format in the Browser window. This mode can be used for debugging.

- Browse HTML: View the file in HTML format in the Browser window.

Print Setup

Select Y to have the Print Setup window appear before printing. Otherwise select N.

Setup Type

This field is only enabled when Normal Printing is selected in the Print Configuration field. Select P to print the file, M to e-mail it and B for both.

E-mail Address

Enter the e-mail address here if you are sending the file by e-mail. If the print file includes an e-mail address, it will be displayed here.

Buttons

Go

Click the **Go** button to activate reprinting from the Print History.

Refresh

Click the **Refresh** button to clear the bottom pane.

XSL Creator

Click the **XSL Creator** button to activate the XSL Creator.

Delete

Click the **Delete** button after selecting one or more files in order to delete the files from the Print History or from the E-mail Errors nodes.

5   Other Print Methods

There are three kinds of print outputs that are not processed through the XSL/XML mechanism. For label printing and catalog printing, ALEPH produces raw XML that can be processed by an external program. Catalog printing is managed through two services. Printing lists from GUI windows uses an HTML mechanism.

5.1   Label Printing

You can use the Smart Barcode Export (export-03) service to generate a file with label information that can be used to produce labels with separate software.

5.2   Catalog Printing

5.2.1   Print Bibliography (print-09)

This service enables you to print catalog records organized in the manner of a bibliography. Note that the output consists of raw XML only - that is, it requires formatting by an external program. Examples of uses for this service are:

- A catalog of new acquisitions, over a time period, sequenced by class mark

- A catalog of AV materials in the library

- A national bibliography

- An index to journal articles

The companion service, "Print Index" (print-10) prepares indices to the bibliography. The records in the bibliography and indices are sequenced according to a headings (ACC/Z01) list. The system actually checks each heading in the list, choosing the catalog records that are contained in the input file for inclusion in the bibliography. If no records are chosen for a heading, the heading itself is also not printed. The system can also print all "see" headings that are related to printed headings.

The resulting print file is intended for regular-sized sheets of paper that can be bound together in book format.

This service adds sequential numbering to the records chosen, in order to enable printing indices, using print_10. This sequential number is made up of two parts: subfield "a" contains the volume number (that is, this particular run and section), and subfield "n" contains the running number within the volume. The entries in the indices (such as author, title, subject, and so on) use this running number to refer to the entry in the bibliographic list. In this manner, the indices can be minimal, printing the heading followed by the sequence number. The sequential number will be added to the relevant bibliographic records, in the tag set in this service.

5.2.2   Print Index for Bibliography (print-10)

This is a companion service to "Print Bibliography" (print-09). It generates indices for the bibliography. Examples of use for this utility are: indexing by authors; indexing by titles; indexing by subjects, where the basic bibliography is in some other sequence (such as classification).

The records in the indices are sequenced according to a headings (ACC/Z01) list. The system actually checks each heading in the list, choosing the headings that point to catalog records that are contained in the bibliography. If a heading does not have related bibliographic records, it does not print.

The heading is printed, followed by the sequential number of the related bibliographic records. This sequential number has been added to both the record and the output file when the "Print Bibliography" service (print-09) was run.

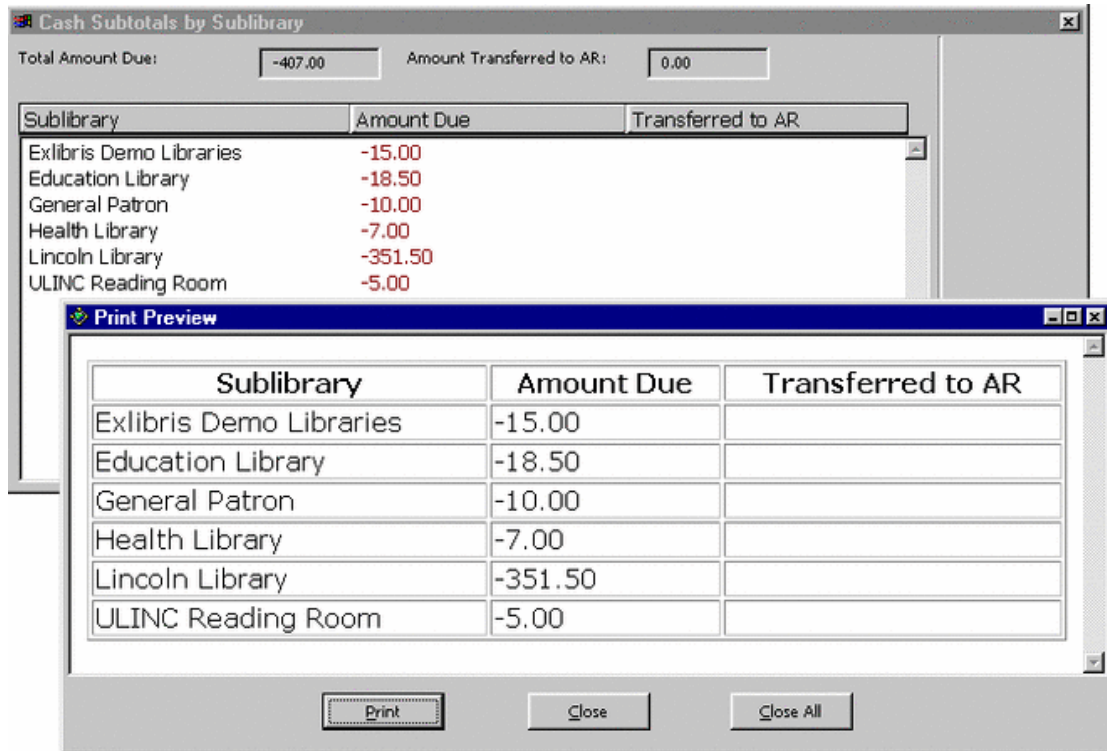For example, the Author Index would appear like this:

```
Amado, Jorge 664
Amaral, Ricardo 318 319 320 343
```

In this manner, the indices are minimal.

Note that the output consists of raw XML only - that is, it requires formatting by an external program.

5.3   Window List HTML Printing

In the GUI, you can print lists in windows containing data. Press F11 when the window is in focus.

Notes:
F11 will not activate the printing of an empty page.
F11 is a hardcoded hot key and cannot be changed.