Staff User's Guide – General

Version 23

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1 Overview

1.1 Library Types

There are six types of libraries in ALEPH. Each library is identified by a five-character code.

- A Bibliographic (BIB) Library contains bibliographic records. It is identified by a number between 01-09 (for example, USM01).

  The Bibliographic Library is the search database. One site can have a single or multiple Bibliographic Libraries. If the Bibliographic Library includes multiple records for the same title, the ALEPH Union View can be used to present a single record to the OPAC user. A single Bibliographic Library database can be made to appear as if it consists of separate databases, using logical bases. Separate databases can solve problems of differing record structure (fields and tags), differing authority control, historically separate databases that cannot be merged, and so on. It is advisable to use one Bibliographic Library, unless there are good reasons to do otherwise.

- An Administrative (ADM) Library contains data about acquisitions, circulation, library staff and patrons. It is identified by a number between 50-59 (for example, USM50).

  Several administrative libraries can share a common bibliographic library. This is called a "multi-ADM environment". In a multi-ADM setup, it is recommended that there be a special shared ADM library for Staff and Patron records. This ADM library will NOT belong to any actual institution and will not have acquisitions, circulation or physical item records. It will contain patron and staff user records.

  In a multi-ADM environment, the Patron records are split between two sub-types of ALEPH libraries -- the special ADM library mentioned above and the actual institution-related ADM library or libraries. General Patron information (name, address and the ALEPH privileges record (for consortial-use)) is held in the special ADM library. The particular circulation privileges records are held in the institution's ADM library.

  A basic definition in your ALEPH setup defines which library serves as a repository for password authorizations, patron records and record update messages. In most sites this will be the ADM library; multi-ADM sites will use a separate library.

- A Holdings (HOL) Library contains location and summary holdings information. It can also hold site-specific fields such as local subjects. It is identified by a number between 60-69 (for example, USM60).

- An Authority (AUT) Library contains authority records for defining preferred forms of headings, relationships between headings (thesauri). It is identified by a number between 10-19 (for example, USM10).

- An Interlibrary Loan (ILL) Library contains copies of the bibliographic records that are being requested by ILL. It is identified by a number between 20-29 (for example, USM20) in the “old” ILL system or 40-49 in the “new’ (released in version 18) ILL system.
- The Course Reading (CR) Library is a Bibliographic Library containing records of material for the Course Reading (or Course Reserve) list. It is identified by a number between 30-39 (for example, USM30).

1.2 Library Naming Conventions

Each library name is made up of a three-letter code for the library, plus a two-digit number designating the type of library.

The main demo libraries are named after the cataloging standards: USMnn, UNInn, MABnn (for MARC 21, UNIMARC and MAB respectively). Clients' libraries have client-specific codes.

Examples:

- USM50 is the (demo) ADM library for MARC 21.
- UNI10 is the (demo) AUT library for UNIMARC.
- KCL01 is the BIB library for King's College, London.

In the documentation, the libraries are usually named according to their functionality. For example, ADM50, BIB01, and so on.

1.3 Numbering in ALEPH

Unique Record Numbers
The system assigns an identification number, which is unique within each of the ADM, BIB, HOL, AUT, and so on, libraries. (The number is assigned using the library's "Last doc number" counter in UTIL/G/2). When creating an ADM record, the system will try to assign it the same number as that of the BIB record to which it is linked. ADM library setup will have normally set their "Last doc number" as a very high number so as to keep lower numbers free to match ADM system numbers to BIB system numbers.

Barcode - for each distinct item (for example: each identical copy of a book has a unique barcode).

Patron - each patron is identified by at least two unique identifiers, the patron ID and the patron barcode. The patron ID is constant and cannot be changed; the barcode can be changed at any time.

1.4 ALEPH Modules

Client	Module	Module Description
GUI Modules	Acquisitions/Serials	• Acquisitions - Ordering, invoice handling, material arrival, claiming, EDI, Acquisitions-related services. • Serials - Subscription management, frequency prediction, issue and item control, routing, claiming, Serials-related services.
	ALEPHADM	Administration of the library's ALEPH tables, which set how the system works for a particular installation.
	Cataloging	Cataloging, Cataloging-related services.
	Circulation	Loans/returns, requests, patron management, cash management, reading room, some item control, Circulation-related services.
	ILL	Interlibrary loans, both incoming and outgoing, ILL-related services.
GUI Functions	Search	Search is included in each of the modules; it serves as a way to find a record to work on; in Cataloging, it also includes cataloging capabilities for headings.
	Items	Item management is included in the Cataloging and Acquisitions/Serials modules. Items information and some management are included in the Circulation module.
	Task Manager	Monitoring of batch reports and processes, printing. Task Manager is included in all the modules.
Web	Web OPAC	Catalog searching, Circulation/ILL functions for patrons.
	Course Reading	Course information and reading materials.
Standalone GUI		

Client	Module	Module Description
Offline Circulation	Basic Circulation activities without main GUI and / or server	
Offline Cataloging	Cataloging data entry without interaction with catalogs, and with local save only.	

1.5 Items, Sublibrary, Collection, Location

Items
The item is the ALEPH "atom".

An item in ALEPH is a physical unit with a unique identifier: the Barcode.

Two identical copies of a book = two items.

Sublibrary
A sublibrary is the smallest administrative unit - a distinct subdivision of an ADM library, in most cases the same as a "branch" library.

Records such as items, orders, subscriptions, loans and transactions are created at the sublibrary level.

Each sublibrary can have its own distinct circulation policy.

Authorizations for librarians for various functions are also given at the sublibrary level.

Collection/Location
Entering the collection and location of items is optional. Collection and location can be entered and controlled in the holdings record, or in the individual item records.

The collection and location can be used to precisely describe the physical location of an item in the library.

Each sublibrary has its own set of collections and shelving notation, based on different classification or shelving schemes).

Order Unit
For acquisitions functions, the library can opt to use "Order Unit" instead of sublibrary to define the smaller administrative units. The Order Unit is a different type of division, and has no relation to sublibraries.

ILL Unit
The "new" ILL module (form version 18) uses ILL units for ILL. ILL units are related to sublibraries for stocks for supplying material.

1.6 Aleph and Unicode

All data in ALEPH is in Unicode UTF-8 encoding. All internal coded values (such as library codes) must be within the ASCII range of Unicode. Character conversion tables are used for setting filing equivalencies and for translating different character sets (such as MARC-8, 8859-1) to and from Unicode for import and export.

1.6.1 Data and GUI Field Language

In all Aleph GUI modules (except ALEPHADM), the staff user can use any language. Data can be typed in and displayed in all languages. This includes all text fields, the record editor (Catalog), search fields, lists, and toolbar text. In ALEPHADM, the user can use only the language defined in the PC code page and English.

1.6.2 GUI Interface Language and PC Code Page

The GUI interface language supports the default PC code page language only.

This means that the GUI interface that displays the GUI language files (for example,. .\circ\tab\eng\window.dat and message.dat, etc) can properly display the language that complies with the PC default code page. For example, for the GUI interface in German, English, French, or Latin a PC code page must be defined, for example, the English code page.

1.6.3 Combined Characters Support in Catalog Editor

Aleph provides a full Unicode support in the GUI modules: CIRC, ACQ, ILL and CAT. Upon setting up a flag in alephcom.ini, Aleph enables additional support for the Aleph GUI-Edit Catalog Record applications that display and edit any Unicode character, including combined characters.

```
Setting up combined characters in  .\alephcom\tab\alephcom.ini

[Main]
CombinedCharSupported=Y
```

Activating the combined character support provides a proper display of combined characters that are in use by various languages such as Vietnamese, Tibetan, Thai, Arabic, and Hebrew.

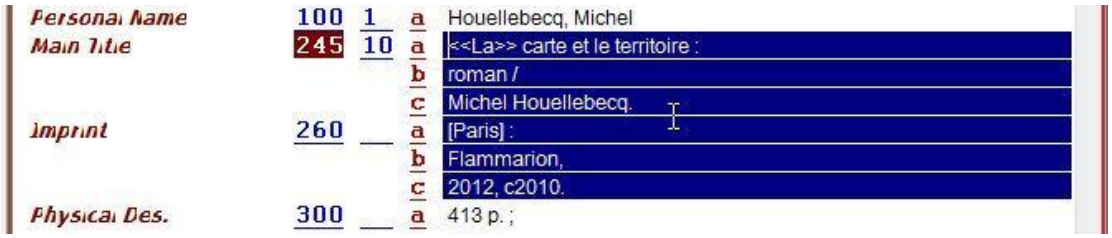
The advanced catalog editor which supports combined characters is in compliance with the Microsoft standard editor and GUI behavior is similar to Microsoft functionality.

Due to this compatibility with Microsoft, the catalog advanced editor behaves differently when compared to the previous catalog-editor tool (in Aleph version

earlier than Aleph 20, where there is no support for combined characters). The following features have a different look and feel:

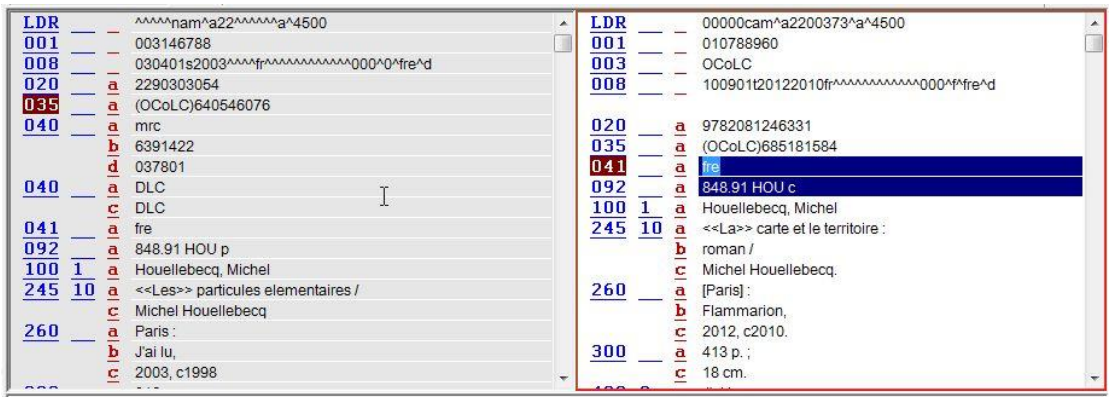
- In the new catalog editor, there is no arrow cursor for the edit lines. Just a thin cursor.

- When lines are marked (selected by user), the whole line is highlighted in blue (not just selected text as it is in previous editor) and there is a thin white line between selected lines.

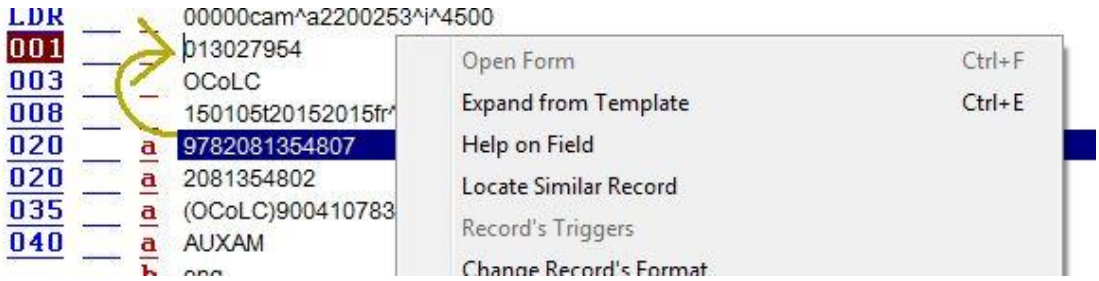


- The copy function (`Ctrl+C`) for copying to the Windows clipboard works only for a single selected line (highlighted in blue) in the editor. When selecting more than one line, it is impossible to use the copy function. Copying multiple selected lines to the Windows clipboard can be done with the copy subfield (`Ctrl+S`) and copy fields (`Ctrl+T`) functions.

- For split editor mode, the non-active record is in gray and there is a white line between the lines. In the previous editor, the whole record is grayed-out with no white lines.



- When opening the pop-up menus for Edit Text (by pressing <Shift> + mouse right-click) and Edit Actions (by right clicking the mouse), the selected field is changed to the place where the mouse is located. In the previous editor, when activating these menus, the field selection was not changed.



- When using the arrows to move between fields, the cursor is put in the last position it was (in that field). In the previous editor, the cursor moves vertically (the X position is usually kept).

- Similar to the Microsoft standard, changing the text direction is supported depending on the PC text direction setup: Right to Left and/or Left to Right. This setup is defined per PC in the Regional and Language Option window. This means that the option to change text direction from right to left is available only if your PC is defined to support right-to-left languages (see below PC setup sample).

When CombinedCharSupported=Y is configured, the **Show hidden characters** option is enabled in the Edit text menu.

Note that there is an option to work with the previous Catalog editor tool by turning off in .\alephcom\tab\alephcom.ini the combined character support: CombinedCharSupported=N

1.6.4 GUI Font Setting

The font which is applied for various characters in the GUI edit box fields is set in .\alephcom\tab\font.ini.
The default font is set in `WindowControls entry:`

```
WindowControls       00000 0FFFF Tahoma                          N N N
12 DEFAULT_CHARSET
```

1.6.5 Font for GUI-Search and Catalog Modules

There are specific fields that use a font with the following advanced feature. This refers to the GUI fields: Search (including Browse, Find, etc), Catalog editor, and Cataloging Forms, etc.

- Setting Font for Combined Characters Supported (CombinedCharSupported=Y)

  There are specific fields which use the font with the following advanced feature. This refers to the GUI fields: Search (including Browse, Find, etc), Catalog editor and Cataloging Forms, etc.

  Special fonts for specific characters (e.g. Old Church Slavonic characters) can be set in `SpecialFont` entries (can be defined per range of Unicode values):

```
SpecialFont                              00531   0058A   Sylfaen
N N N 18 DEFAULT_CHARSET
SpecialFont                         02070   0208E   Reader   Sans
N N N 17 DEFAULT_CHARSET
SpecialFont                         0E000   0F8FF   Reader   Sans
N N N 16 DEFAULT_CHARSET.
```

  In combined characters mode (CombinedCharSupported=Y), the font is set per field and it is sensitive to the first typed-in character. This means that upon inserting a character, the system looks for its Unicode value in SpecialFont entries and applies the relevant font for all field content. The font of the first traced character is used. Any character inserted after the first special character does not affect the font used for that field. The whole field content is displayed in the same font.

- Setting Fonts for Combined Characters Not-Supported (CombinedCharSupported=N)

  The font is set per single character. This means that field content might be displayed in a few fonts according to the fonts that match the inserted characters. The system applies EditorField (for Catalog module) and UnicodeEdit (for Search) entries of font.ini.

1.6.6 Normalization of CJK Characters

To determine which CJK characters should be normalized, set up the \Alephcom\Tab\CJKNormalization.txt table.

Note that Chinese customers should remove the following characters from the table:

- 0xFF0C
- 0xFF1A
- 0xFF1B

The maximum number of characters allowed in the table is 200. The system's default behavior is to not perform any CJK normalization if the table is empty or if it is not found under .\Alephcom\Tab.

2 User Assistance

Help is available throughout the system, in both the GUI and Web modules.

2.1 ALEPH User Guide

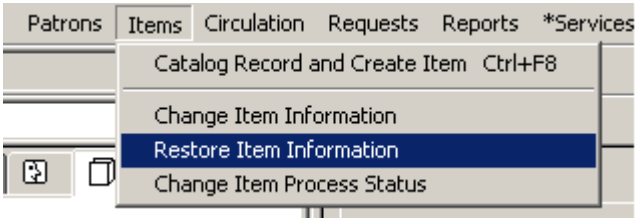
The ALEPH User Guide is your primary resource for information about ALEPH 500. It is divided into modules. Some modules relate to a particular GUI (for example, Cataloging) and some modules explain a function available in several GUIs (for example, Search) or a topic (for example, Authorities). The User Guide describes the functions and options available, and provides step-by-step instructions for completing tasks.

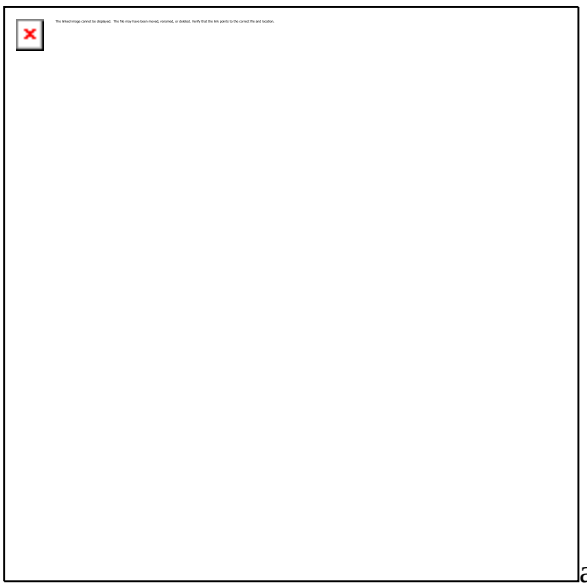
The ALEPH User Guide can be accessed via the Ex Libris Documentation Center.

2.2 Online Help

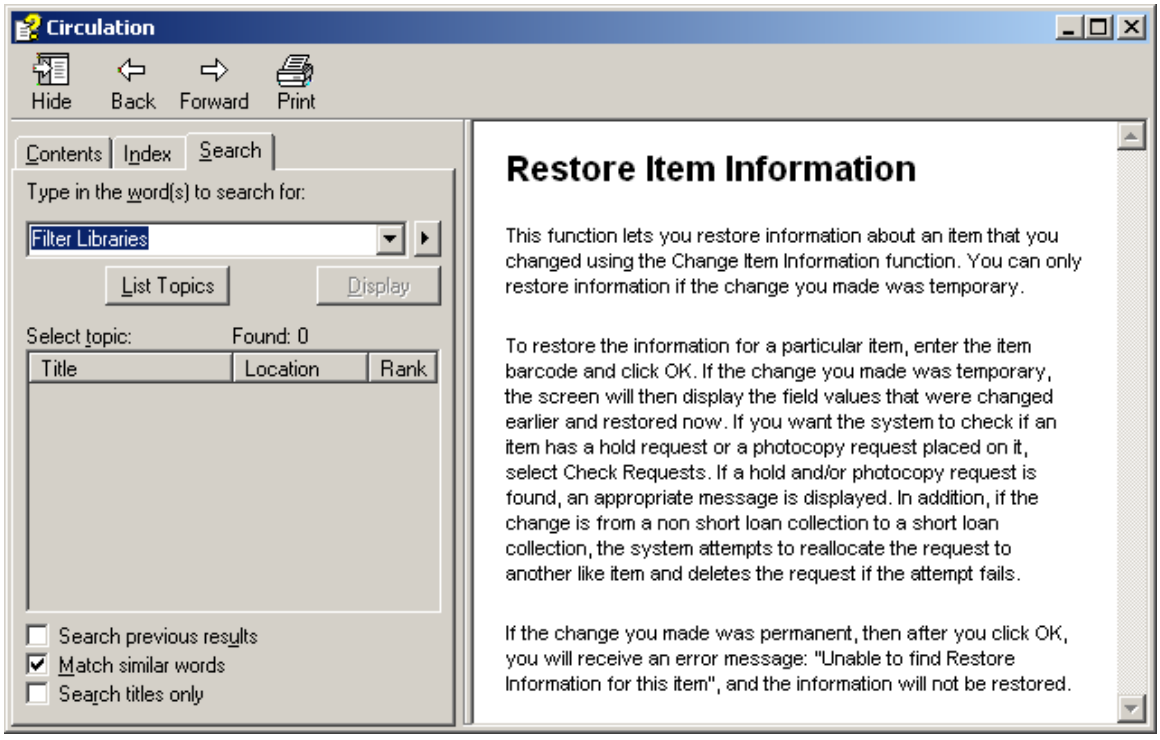
To access Help in an ALEPH GUI, do one of the following:

- Press F1 from a highlighted menu entry:



- Click **Help**.
- Press F1 from the pane in focus.
- Click the question mark  and then click a screen element.

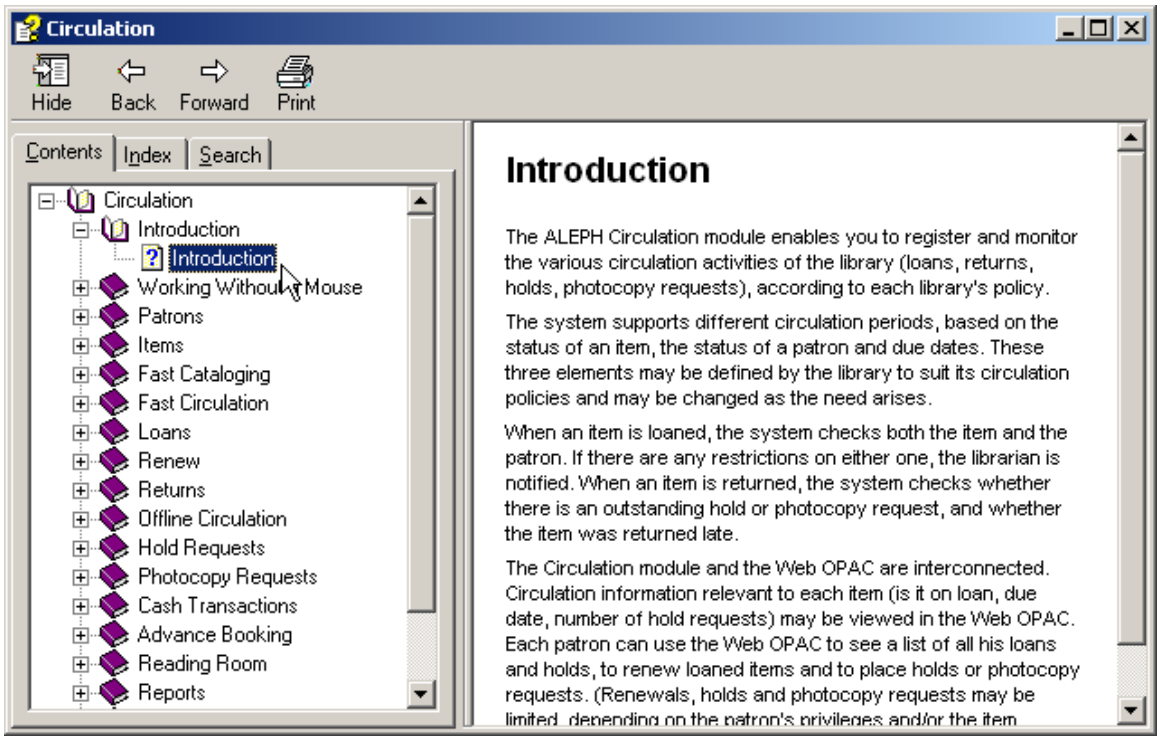
A typical Help topic looks like this:



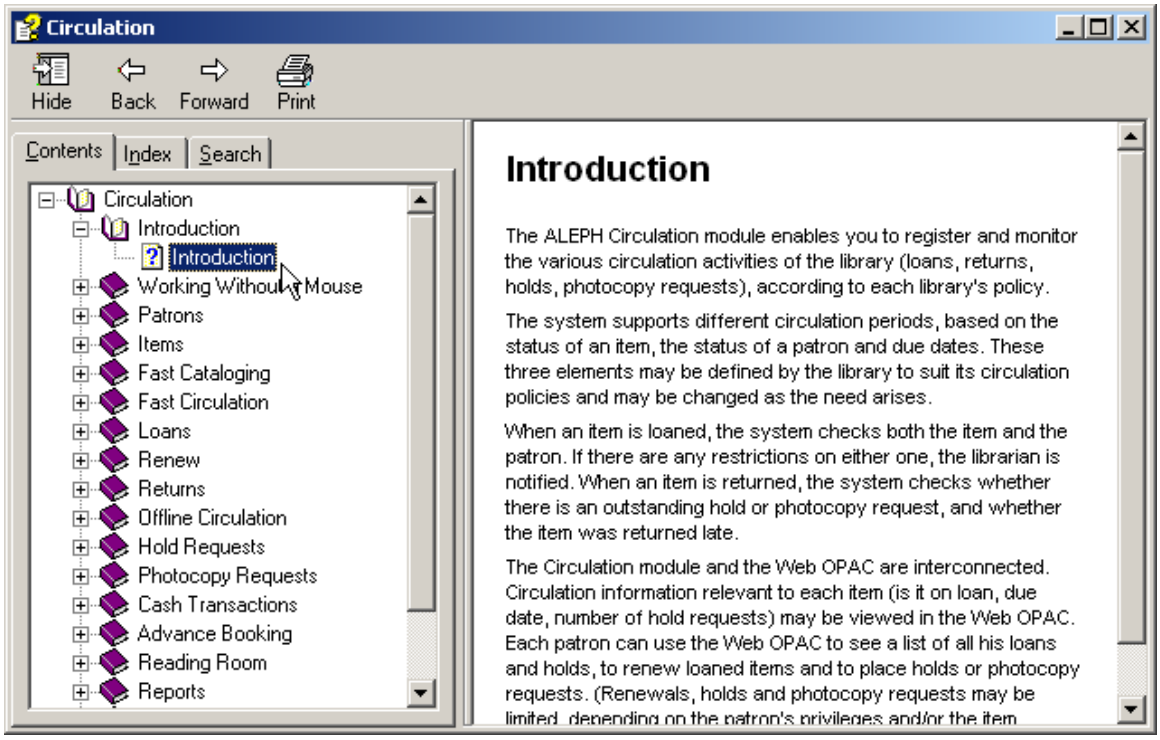
The following sections explain some of the actions available on the Help window:

Viewing Contents

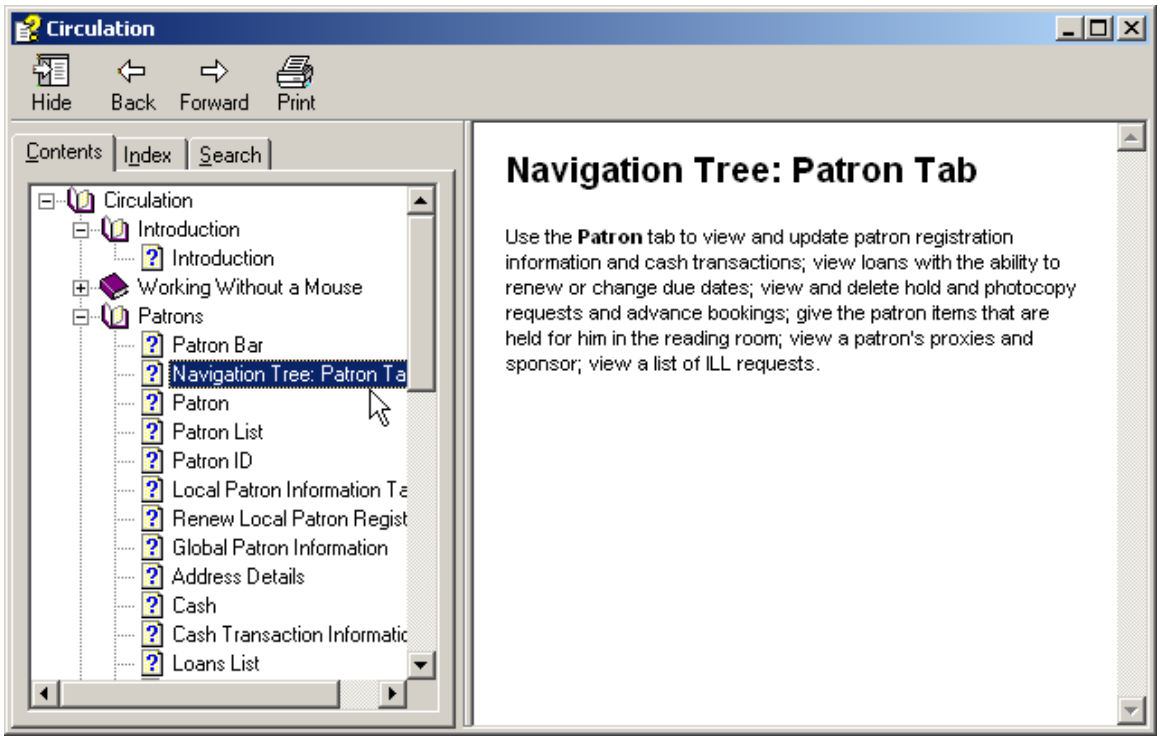
The Table of Contents includes Help for all ALEPH GUIs. Click the Contents tab to view the table of contents:



Click a book or line and then click **Open** (or double-click a book or line) to view the topics belonging to a specific subject:

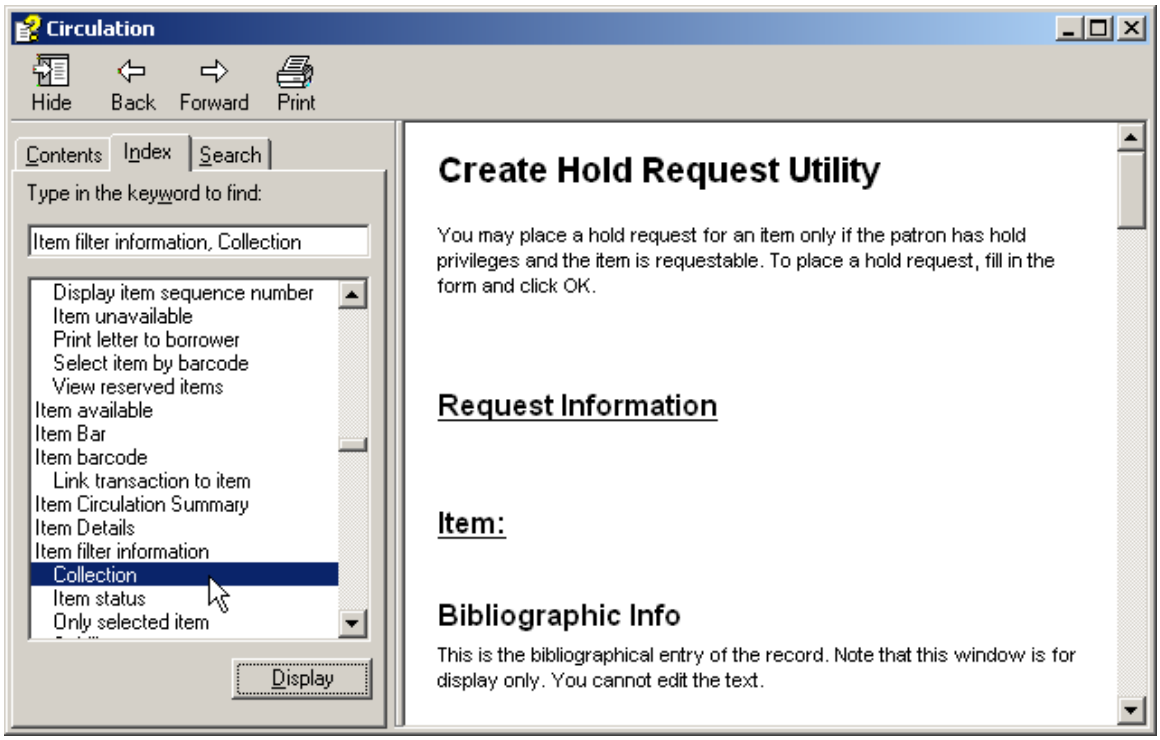


Click a topic and then click **Display** to read its Help:



Viewing Index Entries
To use the index:

1. From the Help window, click the Index tab:

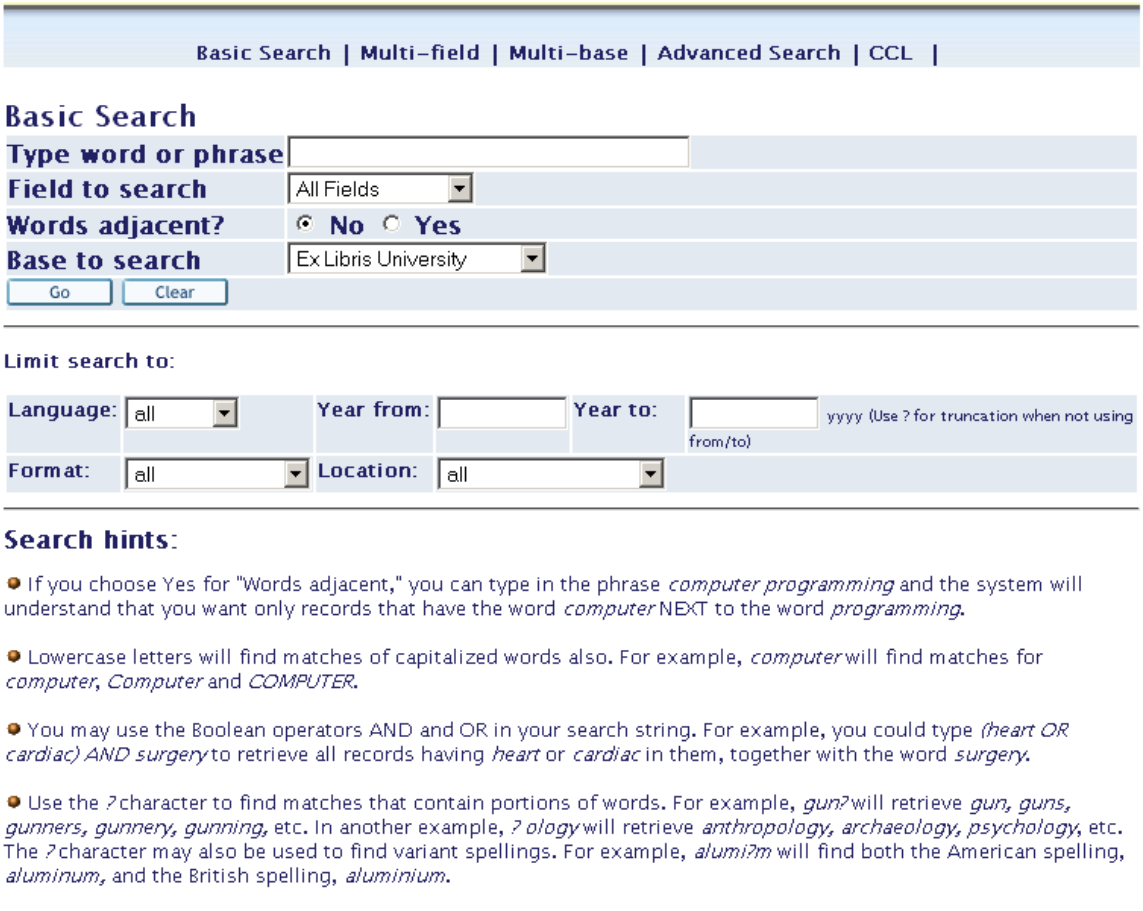


2. Type a topic you want to find, or scroll through the list of index entries.

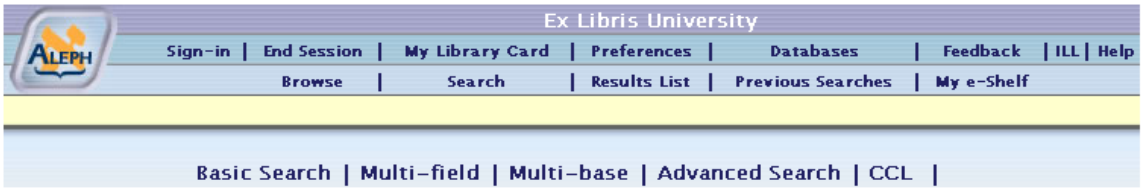
3. Click the index entry you want and then click **Display**.

2.3 Web OPAC

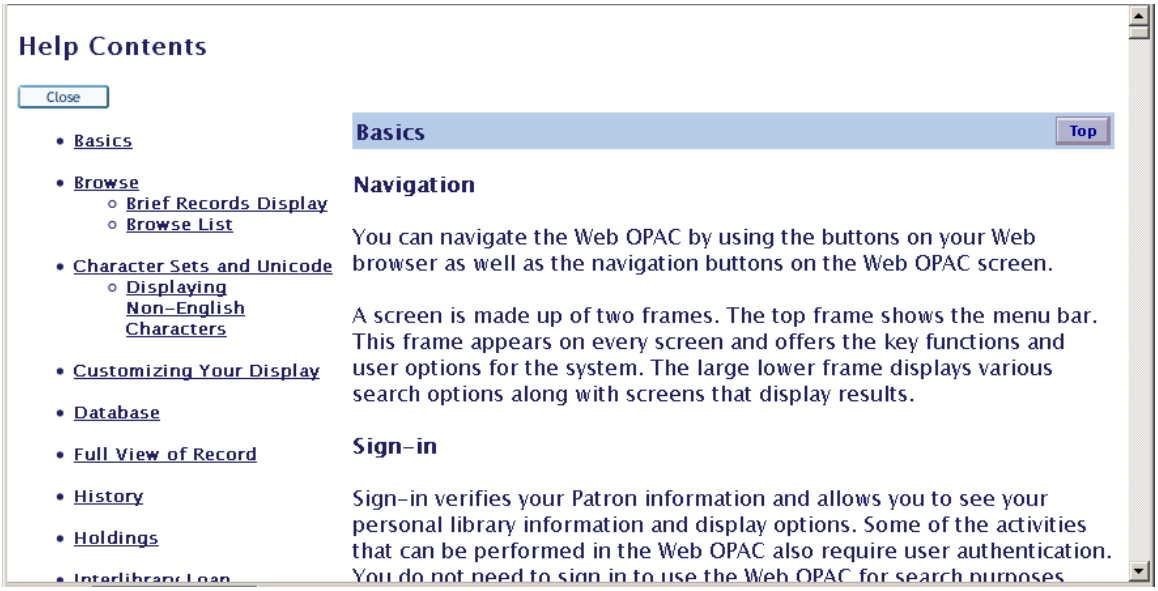
In the Web OPAC, many of the screens contain simple instructions:



In addition, more general Help is available by clicking the Help option on the menu in the upper frame of the browser:



When the user clicks Help, the following window is displayed:



3 Using and Customizing your GUI

This chapter introduces different screen elements within the ALEPH GUI. It also shows you how you can change the appearance of the ALEPH GUI on your workstation.

You can change the look and feel of an ALEPH GUI by tailoring the windows and tables that govern data display.

GUI stands for Graphical User Interface. This is an environment in which you can interact with your workstation using user-friendly graphical software, which includes buttons, arrows, icons and keys.

Client is the software stored on your workstation, which interacts with the server where your databases(s) and ALEPH automation system software reside. Generally, the client includes all the ALEPH modules. The GUI client can be repackaged and redistributed by the System Librarian / Administrator.

When you use an ALEPH GUI client, you have the choice of either using the mouse to get around (by pointing and clicking buttons, arrows and icons) or simply using the keyboard.

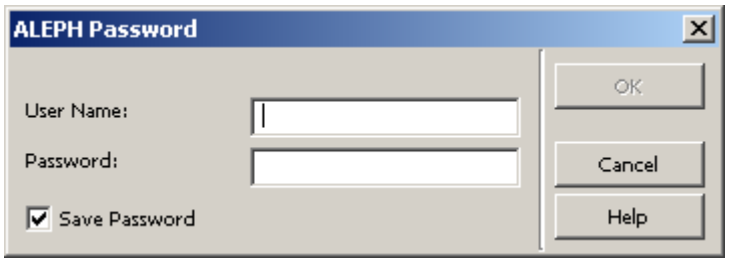
3.1 Logging In

When you start the first GUI module on your PC, if you are not already logged on, the software prompts you for a user name and password. If this name/password is not valid, contact your system librarian for assistance.

To log in to an ALEPH GUI, follow these steps:

1. From the Windows Start menu, click Programs>ALEPH 500>*"Module Name"* or create a shortcut on your desktop to the ALEPH Applications Toolbar.

2. The ALEPH Password box is automatically displayed if the 'Save Password' box has *not* been selected in the last login process for your workstation's PC client:



3. Type your User name and Password. Be sure to clear the 'Save Password' box, if applicable.

Note
If you enter an unregistered user name, the default user name "NONE" will be used and the following message will appear:

ALEPH login not supported on your GUI configuration

You will only be able to work in offline mode.

3.2 Changing the Interface Language

You can change the interface language at any time by right-clicking the "Tower of Babel" icon in the bottom right corner of the GUI and selecting one of the available languages from the pop-up menu.

Changing Fonts and Colors
To change the font or color of a Help topic:

1. In the Help topic window, click **Options**. You can also display the Options menu by right-clicking in the Help topic or pop-up window.

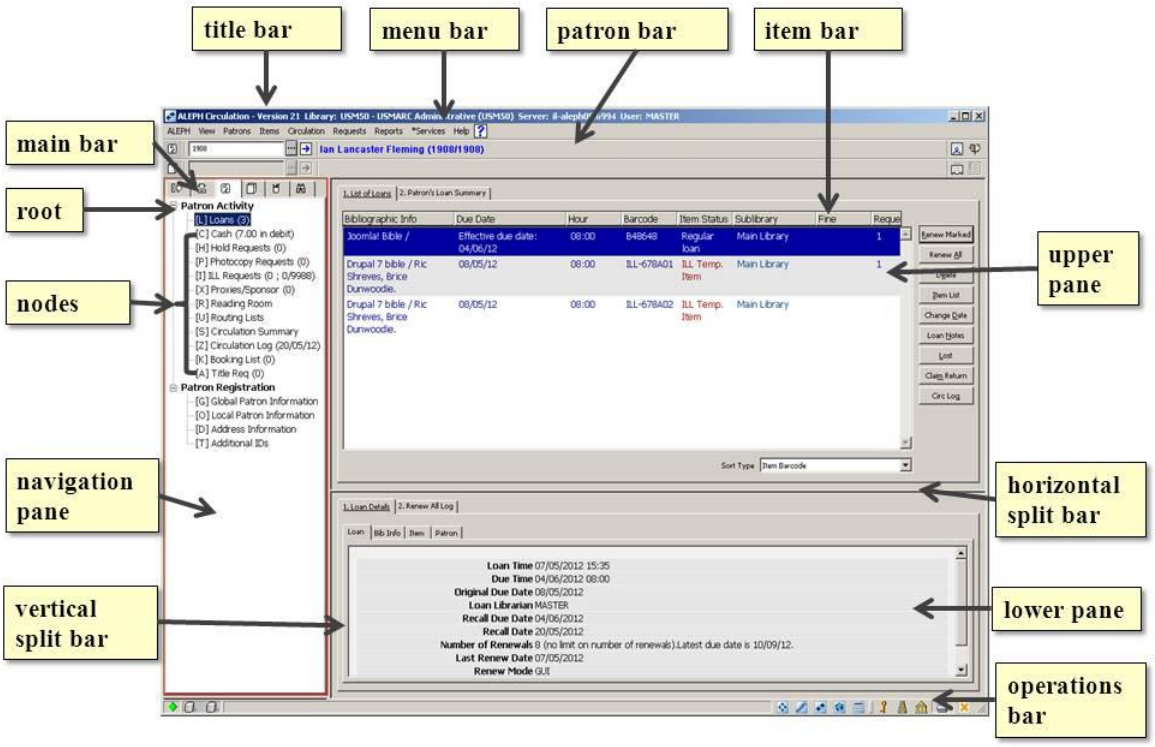
2. To change the font size, point to **Font**, and then click Small, Normal, or Large. To change the color, click **Use System Colors**.

3. When prompted to close Help, click **Yes**. When you open Help again, the background color and text matches your system colors.

Note
Changing the font or color only affects the current Help file.

3.3 Looking at the ALEPH GUI

The following illustration shows a typical ALEPH GUI screen (in this case, a Circulation GUI screen, which displays Patron information:

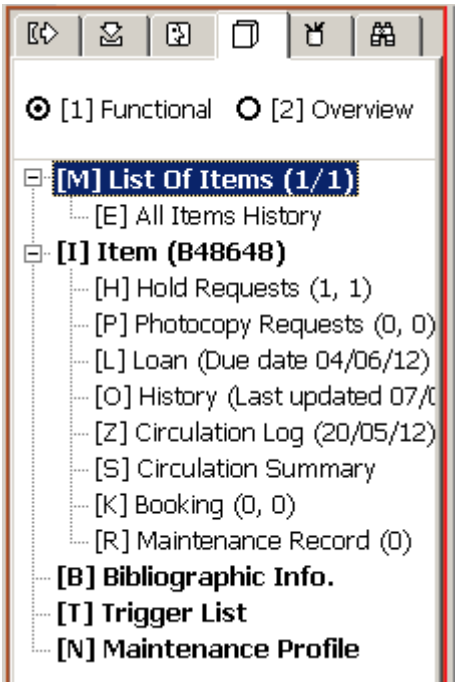


The callouts use spelling conventions that match how the screen element names appear in documentation.

This section covers screen elements that are common to all module GUIs. Screen elements which are specific to a particular GUI are described in the Overview chapter of the relevant GUI.

Navigation Tree

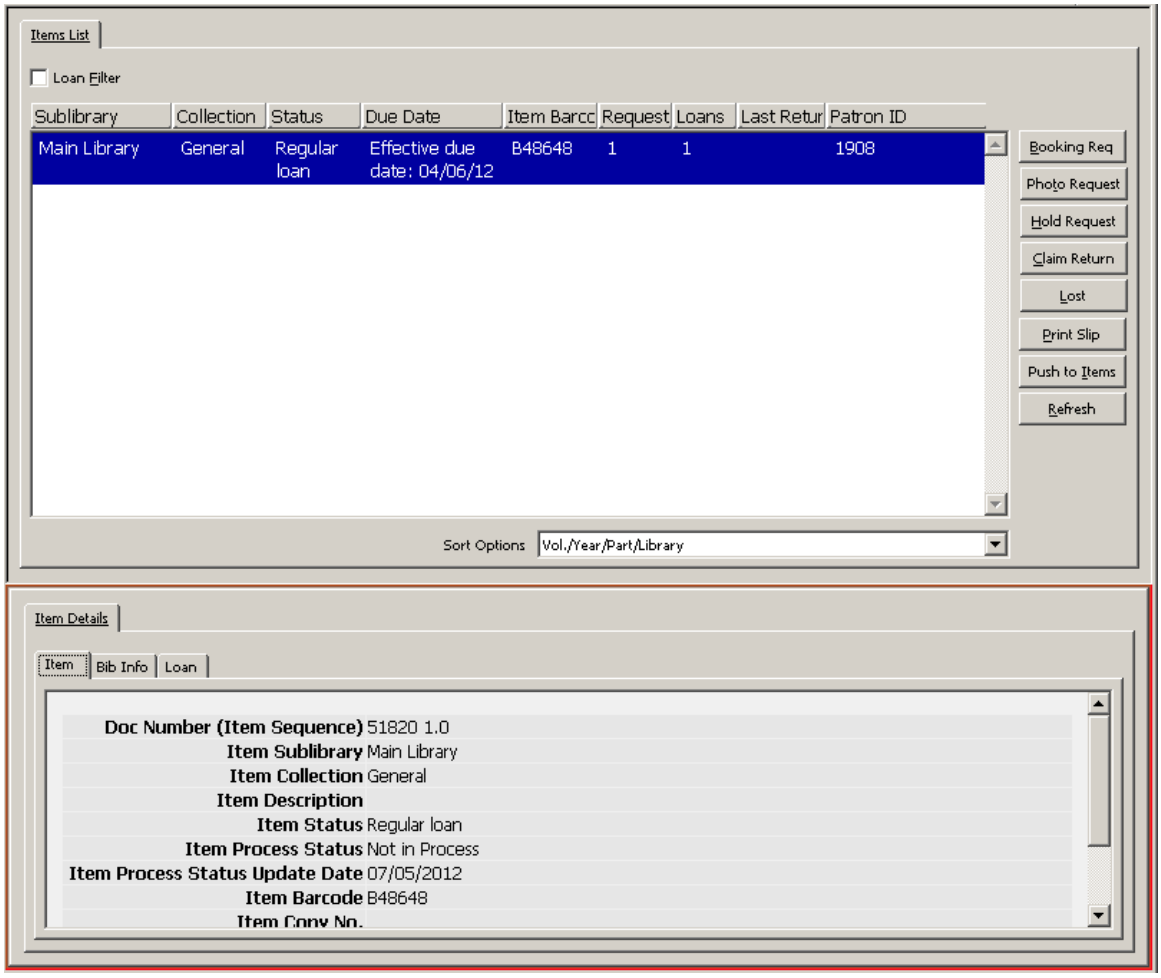
Just like menu commands, the nodes of the navigation tree activate different screen areas when clicked:


[1] Functional
[2] Overview
[M] List Of Items (1/1)
[E] All Items History
[I] Item (B48648)
[H] Hold Requests (1, 1)
[P] Photocopy Requests (0, 0)
[L] Loan (Due date 04/06/12)
[O] History (Last updated 07/
[Z] Circulation Log (20/05/12)
[S] Circulation Summary
[K] Booking (0, 0)
[R] Maintenance Record (0)
[B] Bibliographic Info.
[T] Trigger List
[N] Maintenance Profile

Upper and Lower Panes

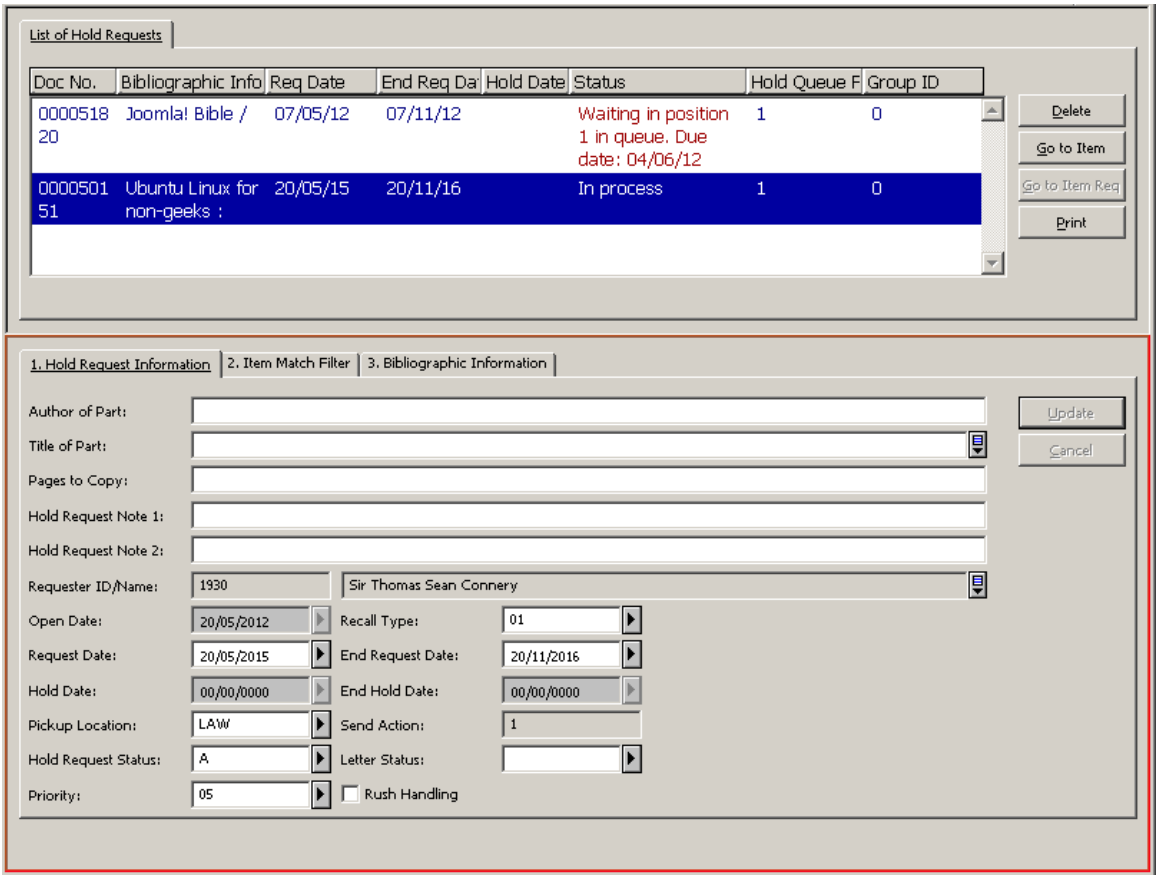
The display of information in the panes is governed by the node selected in the navigation tree. The display can consist of a form, a list, or a record. The upper and lower panes change according to context.

Example 1



In this example, the lower pane contains detailed information relating to the line highlighted in the upper pane (expanded view of Items information).

Example 2



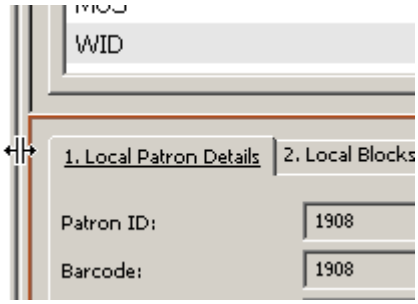
In this example, the lower pane contains a dialog box enabling you to update the information regarding the highlighted line in the upper pane (hold request).

Split Bar

This is the horizontal or vertical double line that separates a window into two panes. In the GUI, the windows are already split, but you can change the size of the panes.

To resize a pane in the GUI:

1. Place the pointer over a split bar. The pointer changes into a sizing handle:

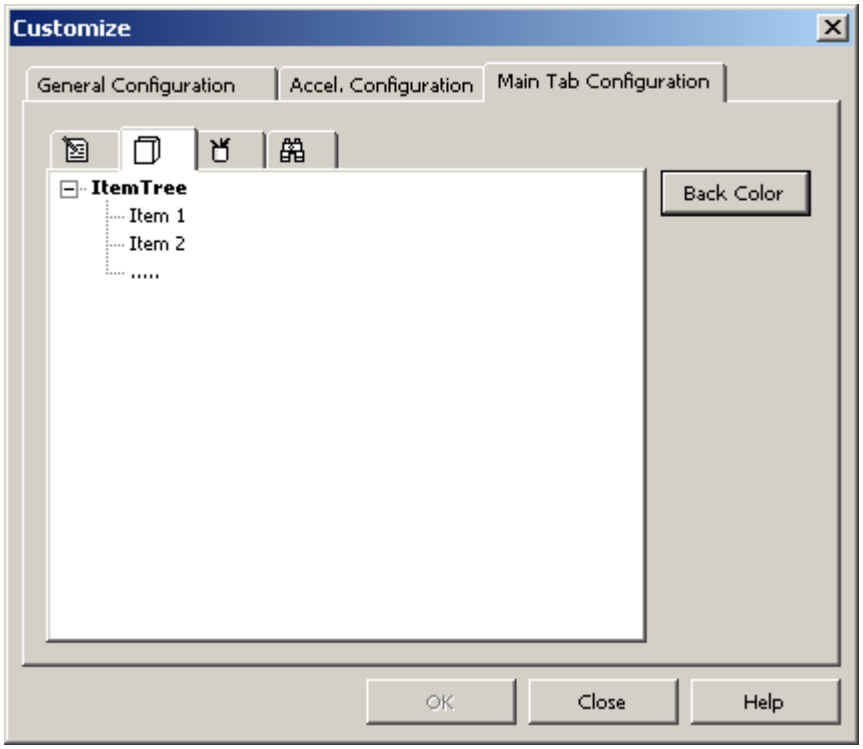


2. Drag the sizing handle to increase / decrease the width / length of windows.

Note
Changes are lost when you exit the GUI client.

3.4 Main Tab Configuration

You can customize the appearance of the main tab. From the ALEPH menu, point to Options, click **Customize**, and select the Main Tab Configuration tab:



There is one option available:
Back color - Use this option to change the background color of a main tab icon and its corresponding navigation tree.

3.5 Operations Bar

The operations bar appears at the foot of the screen:

It contains the following, going from left-to-right:

- Indicators of the connection status of the program
- Applications icons which you can click to open, or switch to, other GUIs
- Setup icons that enable you to customize the GUI setup.

3.5.1 Indicator icons

The Connect icon, located in the bottom left-hand corner of the window, shows whether or not the GUI is currently connected to the server. Green indicates that there is a connection; red indicates that there is no connection.

The PC/Server Link icon displays a red line if a request is being processed:

If you want to stop a process, click the red line to initiate a user break.

3.5.2 Applications Icons

Name	Icon
Acquisitions/Serials	
ALEPHADM	
Cataloging	
Circulation	
ILL	

3.5.3 Setup Icons

The icons to the right of the operations bar contain user-defined GUI setup controls.

Key

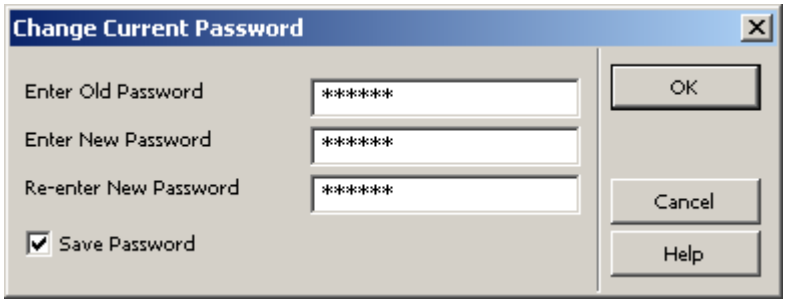
When you right-click the Key icon, the follow menu pops up:

The options available on this pop-up menu are explained below.
Login as Another User - If you need to change a login to a new user, choose **Login as another user** from the pop-up menu or press the **L** key. The following window appears:

Type in another user name and click **OK**. The user name refers to the name under which a staff member is registered in the ALEPH system.

Change Current Password - To change your password, carry out the following steps:

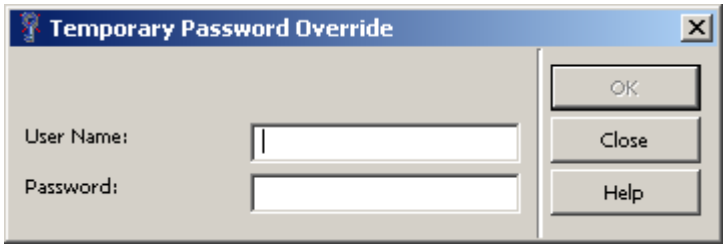
1. Choose **Change Current Password** from the pop-up menu or press the **C** key. The following window appears:



2. Fill in your old password and then the new password twice, as shown above. Clicking **OK** saves the new password whether or not you have selected the **Save Password** option.
3. (Optional) Select the **Save Password** option only if you do not want to have to log in the next time you open ALEPH.

Using a Temporary Password - To temporarily override a password for added functionality, carry out the following steps:

1. Choose **Temporary Password Override** from the pop-up menu. The following window appears:



2. Enter the overriding User Name and Password and press the button. As long as the Temporary Password Override window remains open, the temporary password is in effect. When the window is closed, the temporary password is no longer in effect.

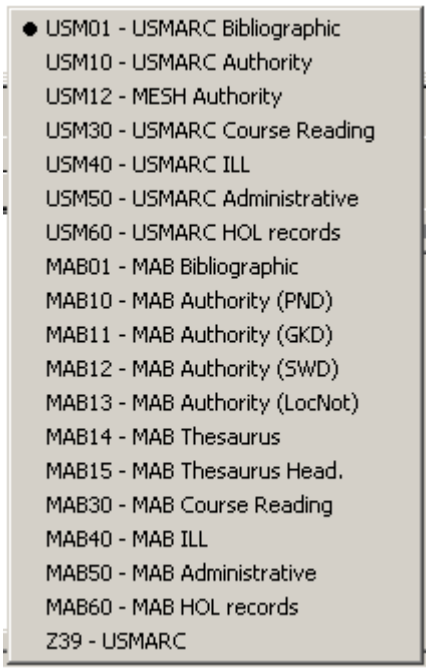
Tower of Babel

When you right-click the Tower of Babel icon, a list of available languages for the interface pops up:

In a multiple-language setup as in our example, you select a language by clicking it.

Library

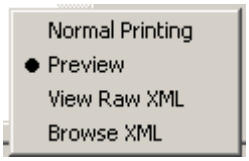
When the client/module opens, you are connected automatically to a library (database). When you right-click the Library icon, a list of available libraries pops up:



Select a library by clicking the appropriate line.

Printer

When you right-click the Printer icon, a list of available print options appears:



These options are explained below:

Normal Printing
When Normal Printing is selected, clicking the Print command (by clicking Print from the ALEPH menu, or by clicking the Printer icon on the GUI menu bar) invokes the Print window.

Preview
When Preview is selected, clicking the Print command lets you preview the printout. You can then click Print to print the file.

View Raw XML
When this option is selected, clicking the Print command lets you view the file in raw XML format in an editor window. This mode can be used for debugging.

Browse XML
When this option is selected, clicking the Print command lets you view the file in raw XML format in the Browser window. This mode can be used for debugging.

3.6 Working without a mouse

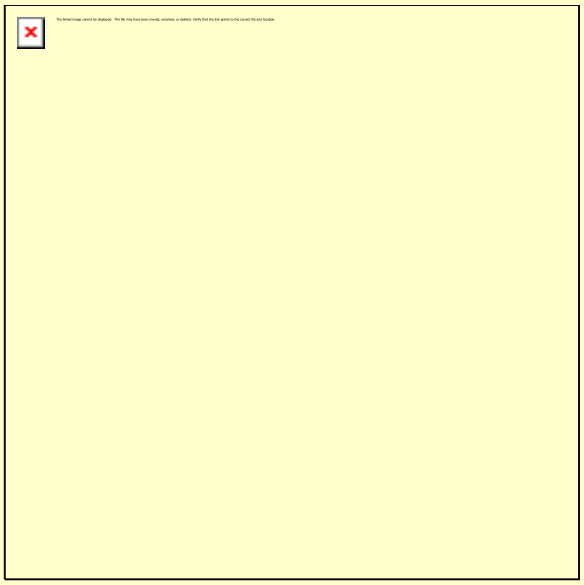
If you prefer to work without a mouse, ALEPH lets you quickly accomplish tasks by using shortcut keys - one or more keys you press on the keyboard to complete a task. Each GUI in ALEPH has its own set of shortcut key assignments:

Keyboard Shortcuts for all ALEPH GUIs

You can advance from one screen element to another by using the following shortcut keys:

Shortcut Keys	Lets you do this
TAB	move to the next control in the dialog box.
Shift+TAB	move to the previous control in the dialog box.
Ctrl+TAB	move from the lower pane to the first control in the first toolbar.
Ctrl+Alt+TAB	move from the first control in the first toolbar to the lower pane.
Ctrl+1	move to the left pane, containing a tree.
Ctrl+2	move to the right upper pane or to the left editor window in multiple view in Cataloging, or to the right upper pane if there is a single editor window.
Ctrl+Shift+2	move to the right editor window in multiple view in Cataloging.
Ctrl+3	move to the right lower pane.
Ctrl+4	move to the record manager (left lower pane) in Cataloging.
Ctrl+5	move to the first control in the top toolbar.
Ctrl+6	move to the second control in the top toolbar.
Ctrl+7	move to the third control in the top toolbar.
Ctrl+Alt+<Letter> in []	navigating in left tree. For example: for [B] Browse item, press Ctrl+Alt+B.
Atl+<number of tab>	navigating in tab controls. For example: In Search - for "1. Advanced Search" use Atl+1, for "2. Multi CCL Search" – Atl+2, and so on.

Note that a frame appears around the active pane (pane in focus).

Drop-down lists opened with the  icon can be used without a mouse as follows:

- To open a list, press F4.
- To select an item from a list, press Enter.
- To highlight an item on a list, use the arrow keys.
- To exit a list without selecting an item, press Esc.

Note that when selecting an item with the mouse, you need to double-click.

You may find it helpful to keep a printed copy of shortcut key assignments in your ALEPH GUI. In Help, locate the Working Without a Mouse topic and click **Print**, or print the relevant pages from the ALEPH Staff User's Guide.

3.6.1 Customizing Shortcut Key Assignments

You can customize shortcut keys in ALEPH by assigning shortcut keys to commands that do not already have them or by removing shortcut keys that you do not want. If you do not like the changes you make, you can return to the default shortcut key settings at any time in the present session. However, once you close a session, any changes you have made in shortcut key assignments will be saved.

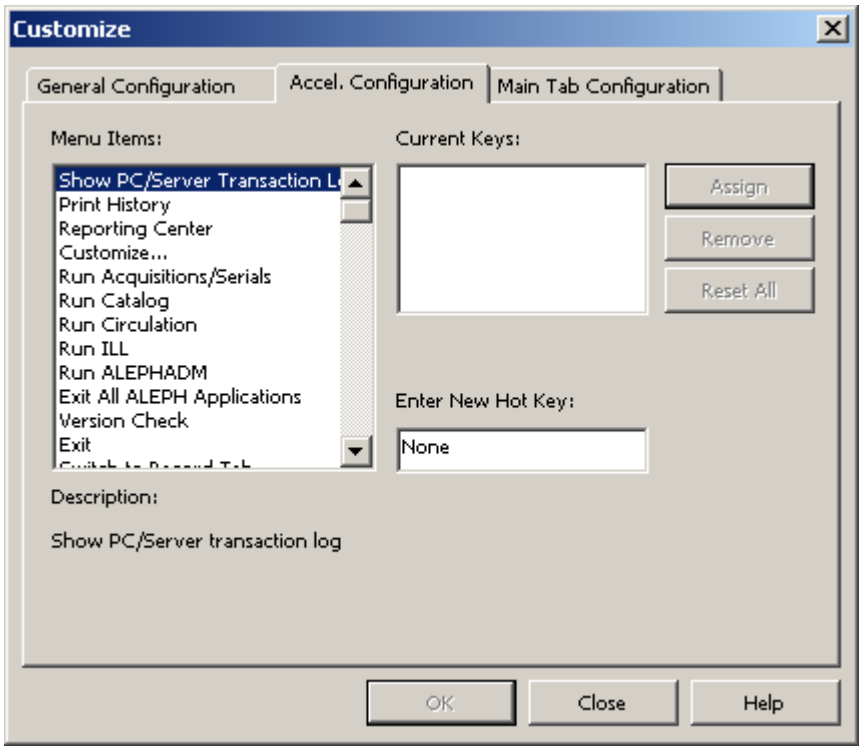
The following is true for all ALEPH GUIs:

Do not use the following shortcut keys: Ctrl+H, Ctrl+I, Ctrl+J. These shortcut keys are reserved for Windows functions and cannot be reassigned.

The Shift key can only be used together with the virtual keys F1-F12.

To customize the shortcuts available in the GUI:

From the ALEPH menu, point to Options, click **Customize**, and select the Accel. Configuration tab:



- To see which shortcut keys are currently assigned, highlight an item in the **Menu Items** list by clicking on it. The shortcut key currently assigned to the selected item is displayed in the **Current Keys** field.

- To assign a new shortcut key, after selecting a menu item, press a combination of keys (for example, Ctrl+F3) and click **Assign**.

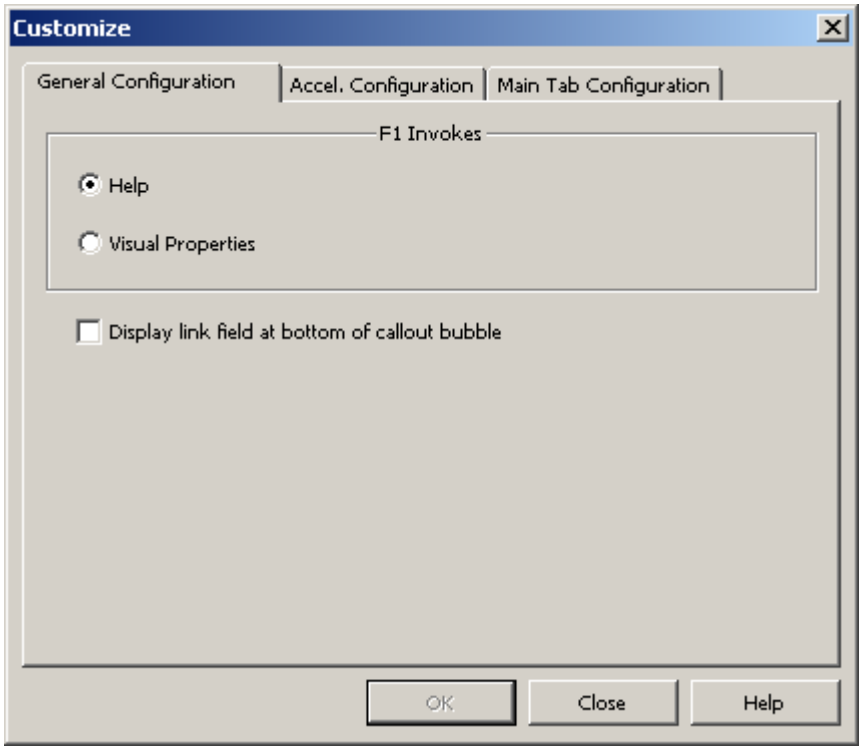
- To remove a shortcut key, select the shortcut key from the **Current Keys** field and click **Remove**.
- To reset all of the shortcut key assignments to the settings present at the beginning of the current session, click **Reset All**.

The key combinations must follow this rule:

- If the Ctrl, Alt or Shift key is to be used, type it first. (You can also type any combination of these keys, for example, **Ctrl+Alt**.)

3.7 Configuring the F1 Key

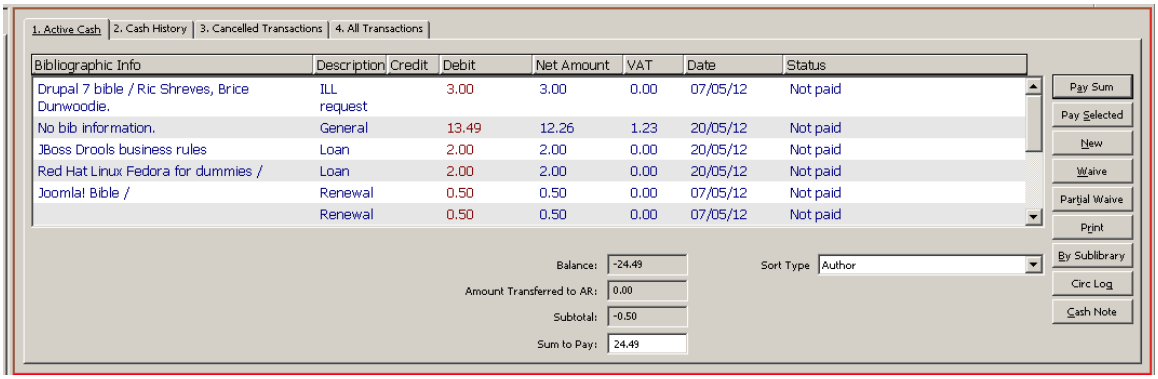
You can customize the function that is invoked when the F1 key is pressed. From the ALEPH menu, point to Options, click Customize, and select the General Configuration tab:



- Select **Help** to receive online help for any screen element when you press F1.
- Select **Visual Properties** to display the Visual Properties window whenever you press F1.

3.8 The Visual Properties Window

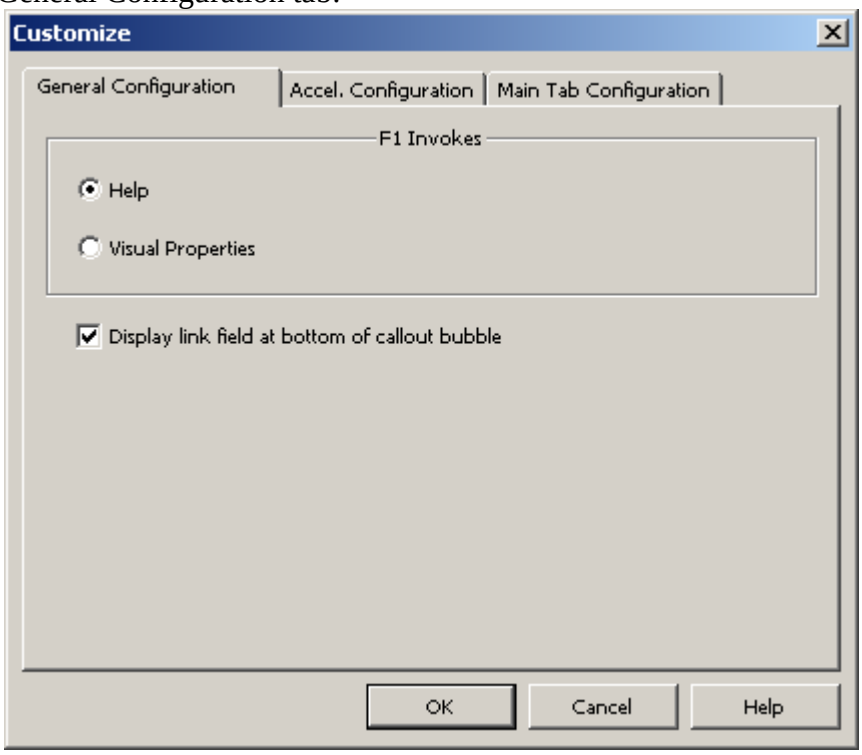
The Visual Properties window is used to view the labels on screen elements (buttons, column names, field names and so on) within an ALEPH GUI.
You can also change the tab that opens first by default when a form is displayed (this is only for forms which are comprised of multiple tabs). For example, in the Circulation module, when the Cash Transactions tab on the Patron Information window is clicked, the following form appears:



As you can see, the above form has four tabs. By default the first (the leftmost) tab is activated when a multi-tab window is opened (in this example, **1. Active Cash**).

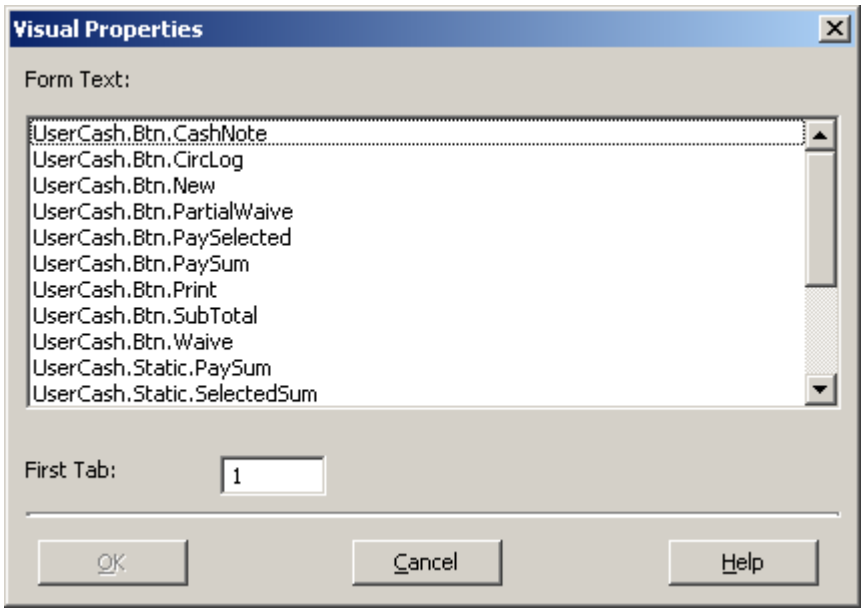
To change the tab which opens by default:

1. From the ALEPH menu, point to Options, click **Customize**, and select the General Configuration tab:



2. Select **Visual Properties** to display the Visual Properties window when F1 is pressed.

3. Open a multi-tab form and press F1. The Visual Properties window appears:

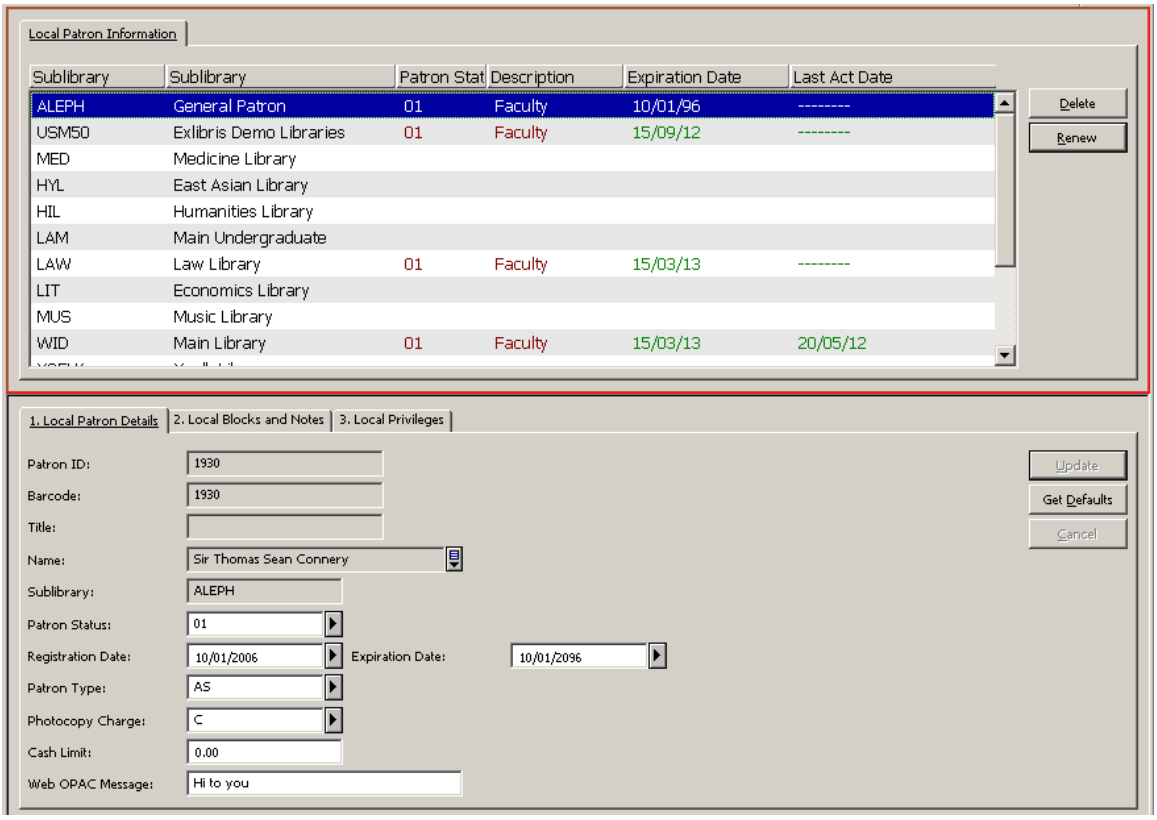


4. In the First Tab field, enter a number to determine which tab is activated when the form is opened and click **OK**. The second tab from the left is 2, the third tab from the left is 3, and so on. In the above example, the number 4 has been entered. The next time the form is opened, the fourth tab from the left (in this example, **4. All Transactions**) will be activated.

3.8.1 Dialog Boxes and Visual Properties

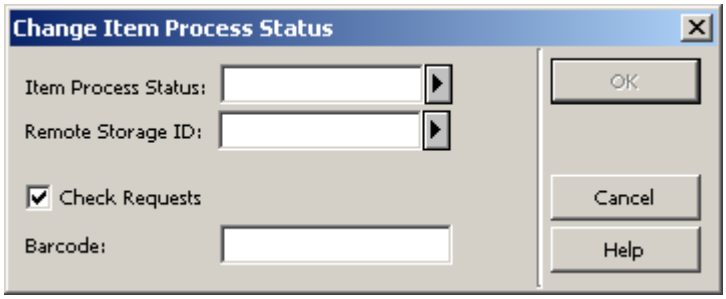
ALEPH GUIs contain panes that display information and dialog boxes that are initiated when a menu option is selected. They can be easily differentiated, as information panes do not have title bars, whereas dialog boxes do. Information panes always originate in predetermined locations, but the location of dialog boxes can be customized by the user.

The following screen contains two examples of information panes:



The main difference between the upper and lower pane in the above example is that information can only be entered in the lower pane.

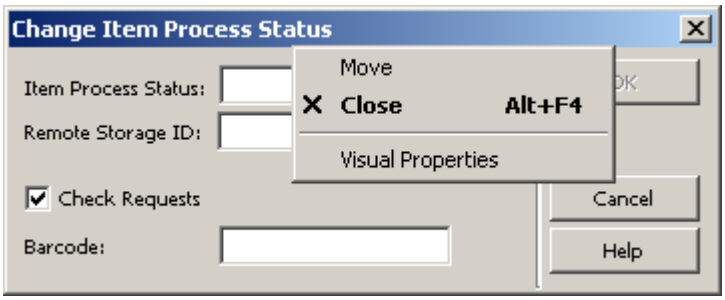
Here is an example of a dialog box:



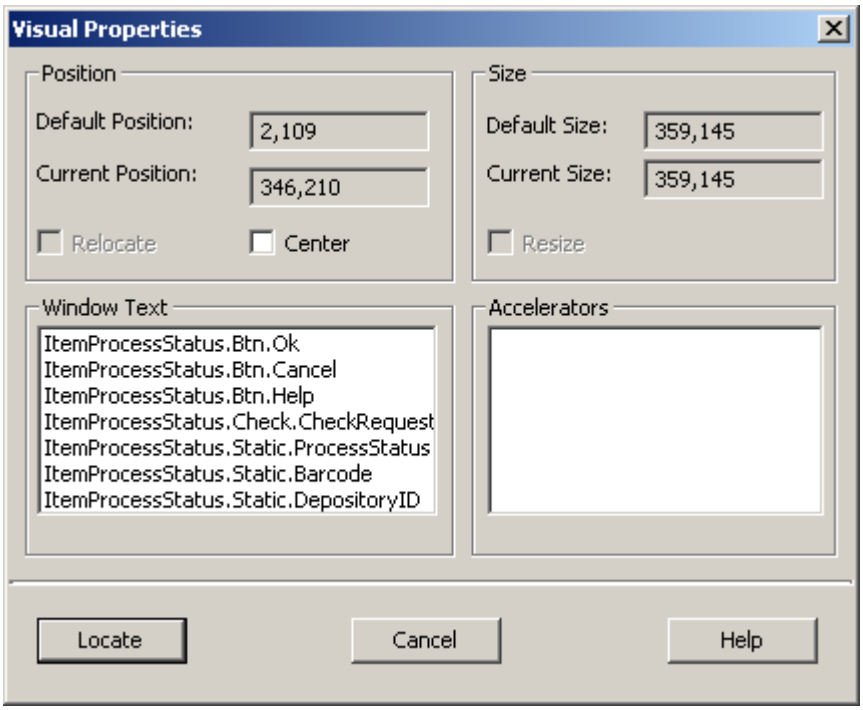
The Visual Properties window enables you to determine where a dialog box (for example, the Update Item's Process Status window) is located the next time the GUI is opened. It also provides automatic centering of the window.

To ensure a window (for example, the Update Item's Process Status window) appears in the center of the screen the next time the module is opened, follow these steps:

1. Place the cursor on the title bar of the window and right-click. The following menu appears:



2. Click **Visual Properties**. The Visual Properties window is displayed:



3. Select **Center**.

4. Click **Locate**. The window is relocated to the center of the screen immediately and appears in the center of the screen the next time the GUI is opened.

If you want the window to appear in any other location on the screen, follow these steps:

1. Drag the window to an appropriate location.

2. Place the cursor on the title bar of the window and right-click. A menu pops up (shown above).

3. Choose Visual Properties. The Visual Properties window (shown above) opens. The coordinates of the "current position" are displayed in the Visual Properties dialog box for your reference (example: 176,192).

4. If you are satisfied with the current location and Relocate box is displayed, select it and click the **Locate** button. If the Relocate box is not displayed, just click the **Locate** button. If the Center box is selected, clear it and click the **Locate** button. The window opens in this location the next time you call it.

Notes:

a. The Window Text pane in the Visual Properties window lists the names appearing on title bars and command buttons in the window selected.

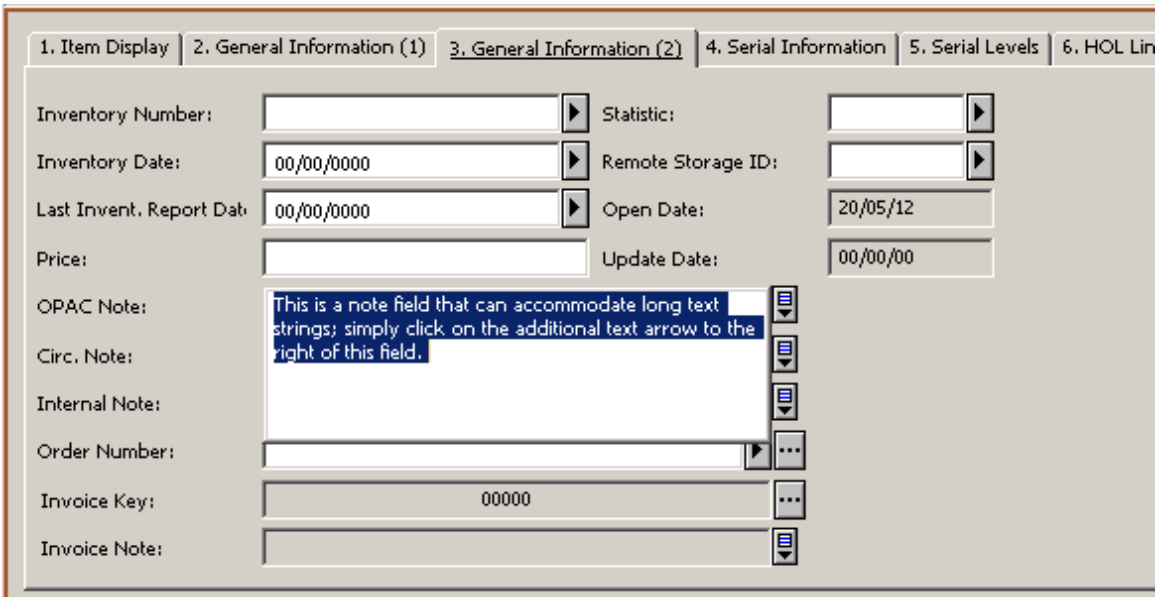
These can be edited through the ALEPHADM module.

b If you click **Move**, a moving handle appears over the dialog box, allowing you to move it to a new location using a drag-and-drop operation.

c. The resizing functionality that appears in the Visual Properties window has been disabled.

3.9 Working with long text fields

There are a large number of forms in ALEPH which contain fields with additional text arrows, indicating that they are longer, for example, note fields:



When you click on the box, the field drops down, letting you view the complete entry in the field beyond the default character display, and enabling you to enter additional information.

When you open this type of field, you can press the Ctrl + Enter shortcut key to insert a line break.

Press **Esc** to close an additional text field.

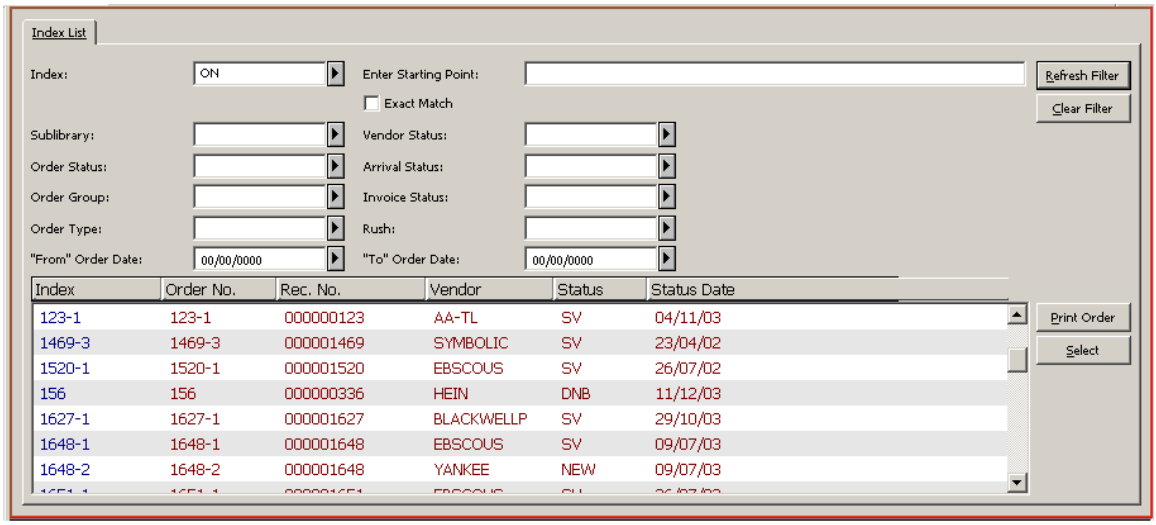
3.10 Dates in the ALEPH GUI

Dates can be set up in the ALEPH GUI by your system librarian in different formats. For example, a British user may prefer a dd-mm-yy date format, whereas an American user might prefer an mm-dd-yy configuration.

Date formats can be set per client. Once set, a date format includes all instances in all modules of the date field in the form windows.

3.10.1 Date Format Setup

The date format setup determines the format for entering the date and its display - the sequence of components and the sign used to separate the components. The following example is taken from the Order Index List in the Acquisitions/Serials module:



In this example, you can see from the various date fields ("From" Order Date, "To" Order Date, Status Date) that the chosen date display format is *dd/mm/yy*.

The default date format setup for the entire ALEPH installation (server and clients) can be controlled by the system librarian.

3.10.2 The Date Field

You enter the date in the Date field and select each digit by highlighting it with the pointer. The Date field consists of a single unit made up of eight digits.

3.10.3 Entering a Date

There are two ways to enter a date in a date field in the GUI client:

- Using the drop-down calendar box. This opens a small calendar page set on the current day's date. You can browse through the days and months with the arrow buttons or the Page Up and Page Down keys, or choose a day within the open month using the mouse.

- Using the F12 key from the date field. If the pointer is in the date field, clicking F12 sets the date as today's date. Clicking F12 again sets all digits to 0.

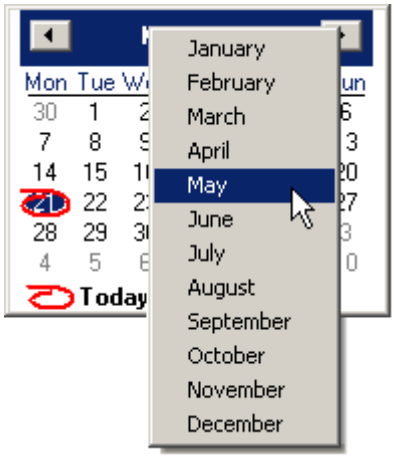
Of course, you can change any date by typing in the appropriate numbers.

To leave the drop-down calendar without choosing a date, press **Esc**.

3.10.4 Browsing Through Months and Years

There are several methods of browsing through months and years:

By using the drop-down calendar - To browse through months, use the arrow buttons in the upper corners of the calendar window. If you place the pointer on the month displayed on the title bar and click, a list of months is displayed and you can select one.



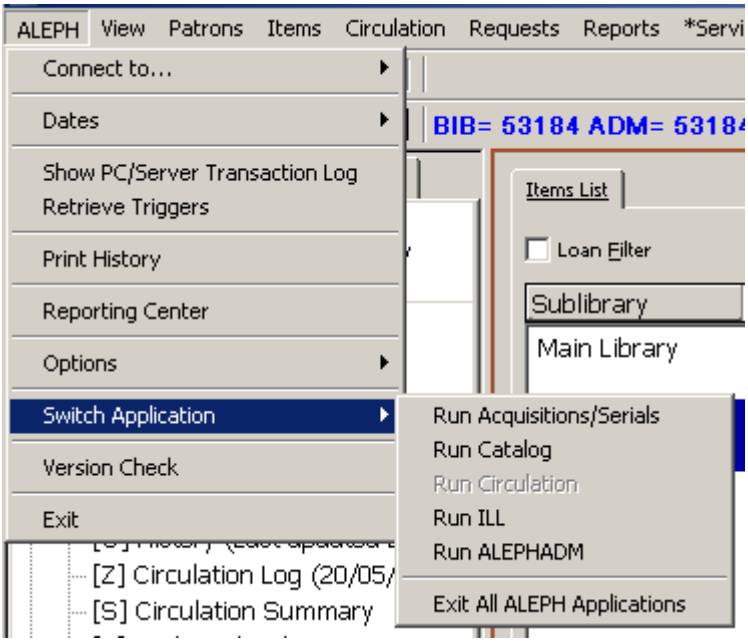
To browse through years, place the pointer on the year in the title bar and click. This opens a spin box that enables you to move through the years.

3.11 Shortcut Icons

Each toolbar has a left side and a right side. The left side contains icon that represent the toolbar's operational context (for example, Items, Patron, Loan, Return). The right side contains icons that can be used as shortcuts instead of menu commands.

3.12 Switching between Applications

In every GUI, you can switch between different applications, not only from the bottom operations bar, but also from the ALEPH menu/Switch Application submenu:



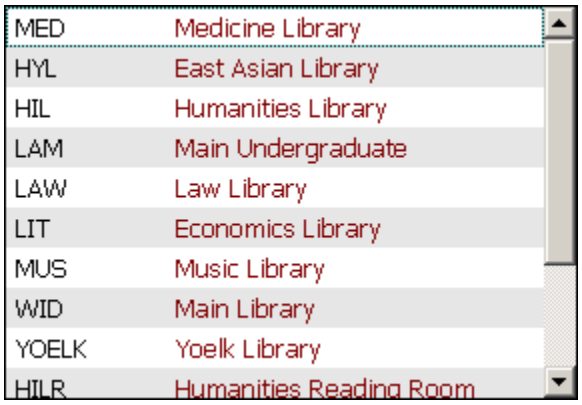
This submenu also contains the Exit All ALEPH Applications option, which allows you to exit from all open ALEPH GUIs. The switch option to the module you are in is disabled.

3.13 Expand Windows Invoked from Forms

There are several different types of expand windows that are invoked from form windows (for example, the Arrival Form in the Acquisitions/Serials GUI):

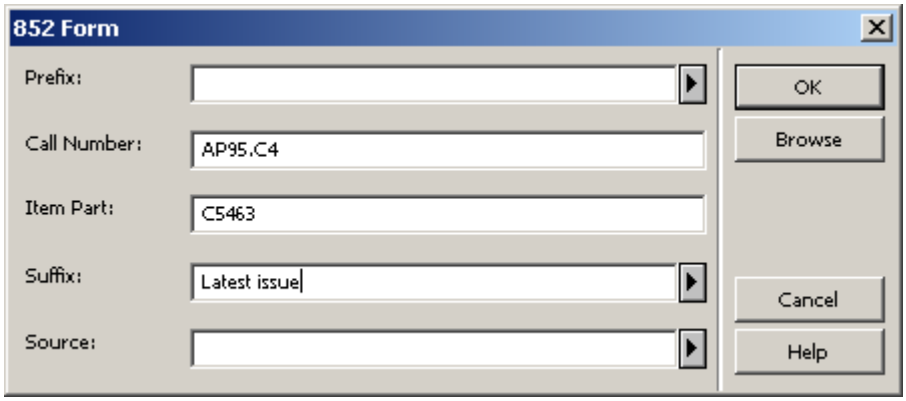
A drop-down calendar invoked from a date field:

A drop-down list that contains items which you can select:



Long text in field. This is a rectangular box, in which you can type additional text:

A separate dialog box:



These expand windows can be displayed in two ways:

- When the corresponding button next to a field on a form window is clicked.
- When the corresponding shortcut key is pressed.

These are the buttons and shortcut keys that correspond to each type of field:

Description of Expand Window	**Icon**	**Shortcut Key**
Drop-down calendar		F4
Drop-down list		F4
Long text in field		F3
Separate dialog box		SPACE Key

In order to use a shortcut key, the corresponding field must be in use (that is, the cursor is in the corresponding field.

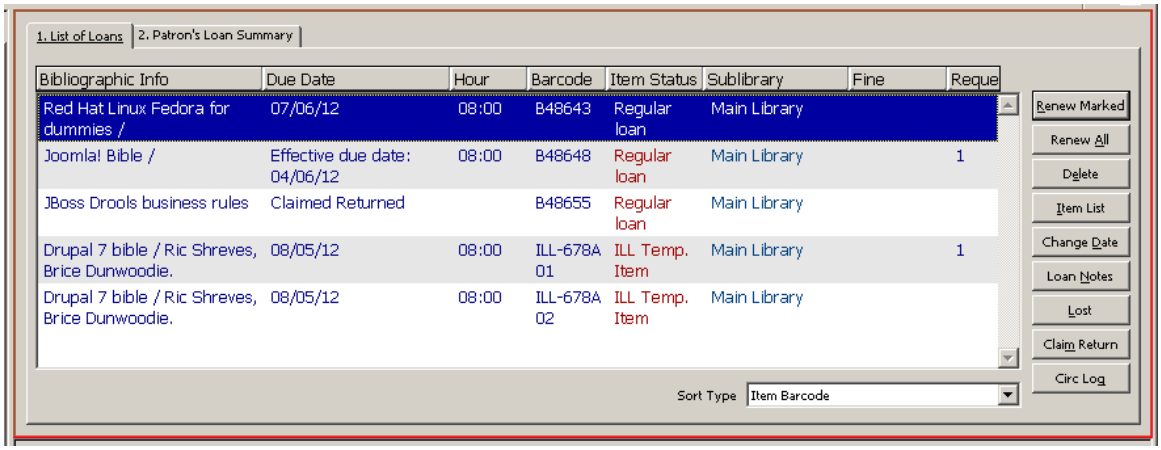
You can close any expand window by clicking the ESC key.

Note

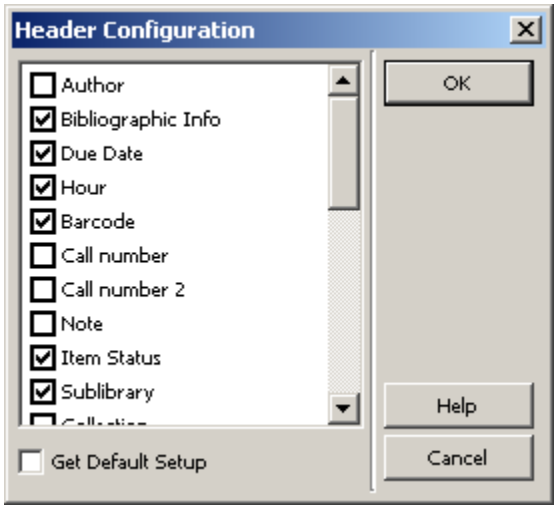
You can use the TAB key to land on the button.

3.14 GUI Lists - Show/Hide Columns

Much of the information available via an ALEPH GUI is displayed in tabular or list format. In the following example taken from the Circulation GUI, when you click the Loans node from the Patron tab, the following list displays:



As you can see, this list consists of information displayed in rows and columns. You can define which columns of information appear in the list. When you right-click any of the column headings in a list, the Header Configuration dialog box appears:



The Header Configuration window contains a list of all possible column headings. In order to remove a column from the list, clear the corresponding check box. Select the **Get default setup** option to revert to the original settings. The original settings are stored on the server.

You can also change column width by dragging the boundary on the left or right side of the column heading until the column is the width you want.

3.15 Version Check

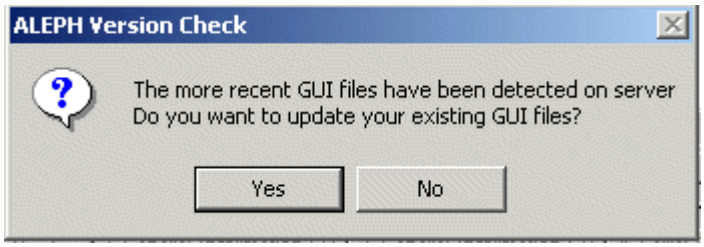
Version Check is a tool used to distribute GUI client files from a central server to an individual workstation. Integrated inside all GUI modules, it automatically informs you about the latest updates and replaces the older files by the new ones on your request.

There are two ways of accessing the Version Check: Automatically and Manually:

- Setting alephcom.ini with RunAtStartup=Y causes version check to run automatically (recommended). An Aleph version check message is displayed when a new session is started.
- Setting alephcom.ini with RunAtStartup=N disables the automatic running of version check. You must run version check manually by activating the Version Check option from GUI-ALEPH menu.

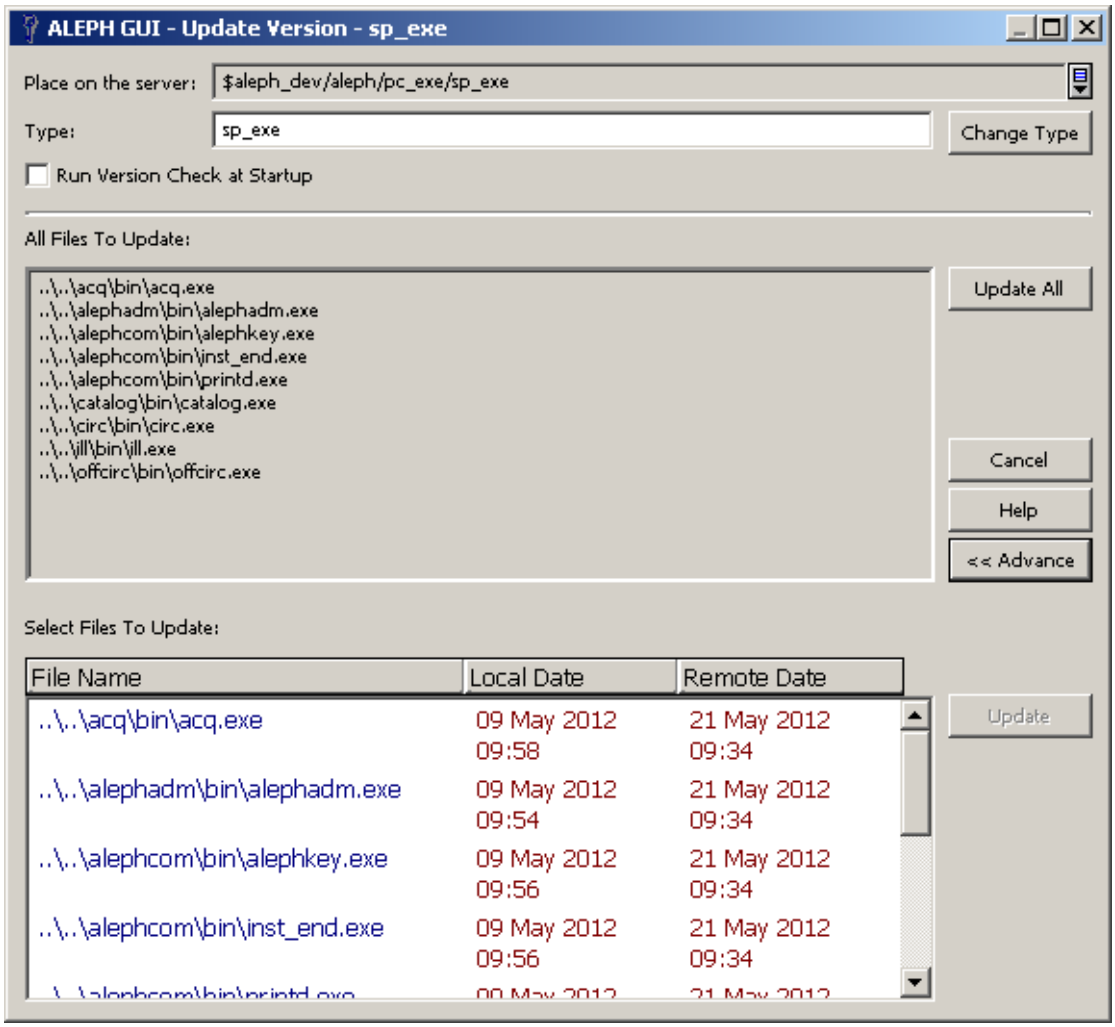
3.15.1 Updating Files from the Version Check

When a new session is started, the system checks if new files have been added to the server and if so, whether they are newer than the corresponding files on the local PC. If new files have been detected on the server and they are newer than the corresponding files on the local PC, an additional check is made in order to detect whether any update has been already done that day. Only one update is allowed per day. If no update has been made that day, the system generates the ALEPH Version Check message:



To update files:

1. If the Version Check message does not appear automatically when the session is opened, click **Version Check** from the ALEPH menu.
2. From the Version Check message, click **Yes**. The Update Version window opens:



You update the files on your PC using the Update version window.

3. The Update GUI exe files and GUI configuration files is done according to the type which is mentioned in the Type tab.

   For example, GUI files which are updated by the Service Pack can be found by performing the following:

   `Type=sp_exe`

```
Type=sp_conf
```

The version check can run in either merge or override mode.

3.15.2 Merge Mode

In Merge mode, lines in the customer's GUI configuration files, such as *.dat and *.ini that were changed by the customer are not replaced on the workstations.

Merge mode does the following:

- Inserts new lines.
- Updates lines but does not alter the strings that were changed by customers.
- Deletes lines that are not relevant.

Notes:

When the service pack is installed, two directories are created on the server:

- sp_exe which includes the GUI executable files
- sp_conf which include the GUI configuration files

In Merge mode, the updated configurations are merged into the customer's original file when files are downloaded from the sp_conf or sp_exe directories (<module>.ini, print.ini, and language .dat files only).

3.15.3 Override Mode

In Override mode, the customer's GUI configuration files (such as *.dat, *.ini) on the workstations are replaced by the files from the server.

It is possible to override existing configuration files with the service pack files by placing the files in $aleph_dev/aleph/pc_exe/ - in directories other than sp_exe or sp_conf.

The files can be placed, for example under a directory named $aleph_dev/aleph/pc_exe/local_conf

After setting the Version Check Type to local_conf and clicking **Update All** or b, the target files are overridden with the server side files.

3.16 Save/Get Defaults

Several forms contain the option to save the information of some fields as default values. The information entered in those fields is used as default values when clicking the "Save default" button (until another setup is saved as the default). The defaults are saved in files with the extension dmp, under AL500/Module/tab/. Note that the dmp files are not created unless there was a default saving. Those files are overwritten when running the GUI installation.
In order to fill a form with the default values, click **Get defaults**. Note that when a new form is opened it already contains the default values.

4 Triggers

Triggers are a way to link a reminder to a record. The reminder can be an instruction to perform a task related to a record, or general information. Triggers can be retrieved and viewed across modules. A single trigger can be directed to a specific grouping ("department"). This means that the acquisitions librarian can input a trigger that is intended for the cataloger, and so on.

Cataloging can be set to create triggers automatically for check routine errors when a record is saved; these triggers are automatically assigned CAT as the department.

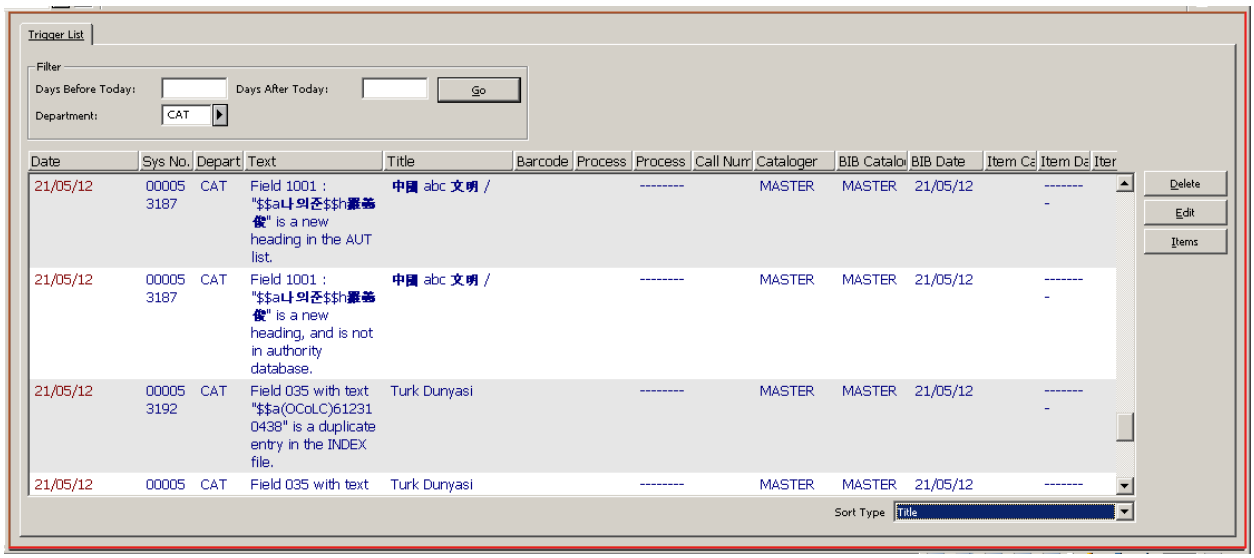
The following explanations deal with the General Triggers List (a list of triggers from which you can directly access the relevant record), and with Record Triggers (the triggers relevant to a displayed record).

There are two ways to view a General Triggers List, batch and online.

Print Trigger Report (com-01) is a batch retrieval service available in each module; the service can be defined to retrieve triggers according to action date (From - To) and grouping (for example, department).

The online retrieval includes an option to filter by action date (From - To) and grouping (for example, department).

4.1 General Triggers List



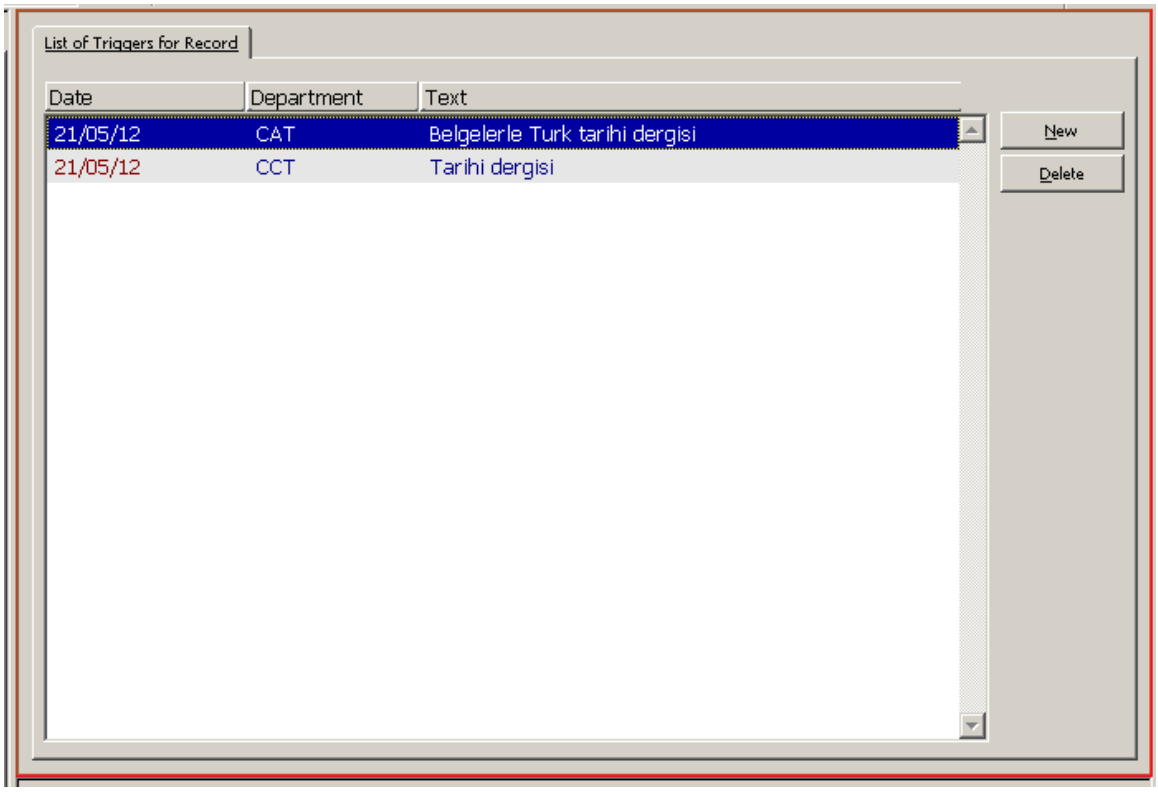
The way in which this triggers list is retrieved varies from module to module:

Acquisitions/Serials -> Administration tab -> Triggers node; the trigger can be used to access the relevant Order or Serial record.

Circulation -> ALEPH menu -> Retrieve Triggers option; the trigger can be used to access the relevant Item record.

Cataloging -> Records tab -> Triggers node; the trigger can be used to access the relevant Cataloging or Item record.

4.2 Record Triggers List



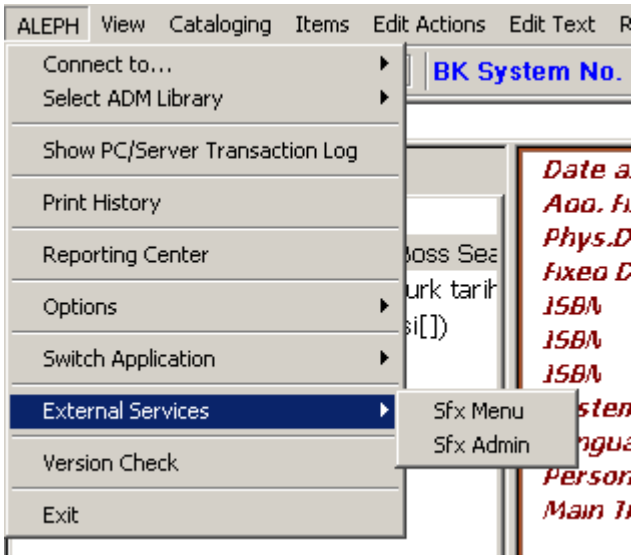
The way to call up triggers relevant to a specific Record Trigger also varies from module to module:

- Acquisitions / Serials -> Order tab -> Trigger List node
- Acquisitions / Serials -> Serial tab -> Trigger List node
- Circulation -> Item tab -> Trigger List node
- Cataloging -> Records tab -> Cataloging editor -> Edit menu -> Record's Triggers
- Cataloging -> Items tab -> Trigger List node

A new trigger can be added or a specific trigger can be updated.

5 External Services

Your ALEPH system can contain several types of external services, such as an SFX menu for regular patrons. You can access available external services by clicking **External Services** from the ALEPH menu in the Cataloging and ACQ/Serials GUIs. Note that you can only access external services if a record is open in the GUI:



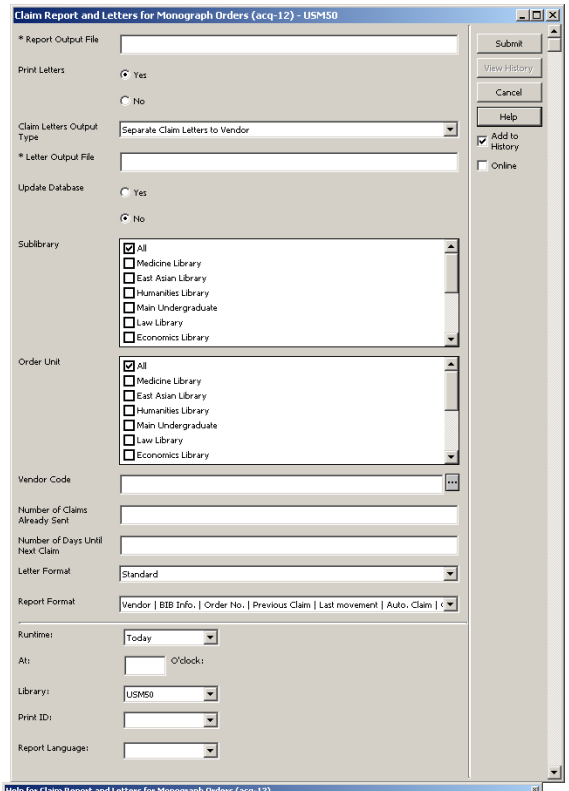
SFX Menu
Choose this option to go to SFX as a regular patron. The system will look for this record in SFX.

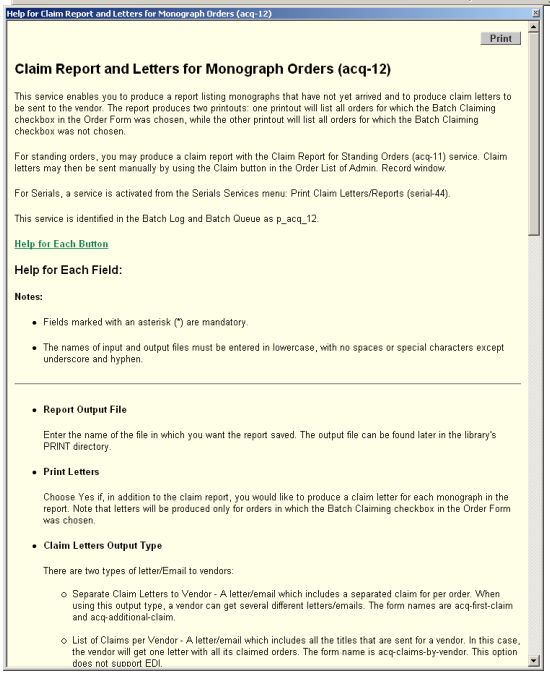
6 Services

In ALEPH, you can run services (batch jobs) to generate reports and to carry out file maintenance. All services are managed from the GUI modules. Each module has a menu named **Services** on the menu bar.

If you do not have the required permission, the Services menu appears dimmed in all GUI modules.

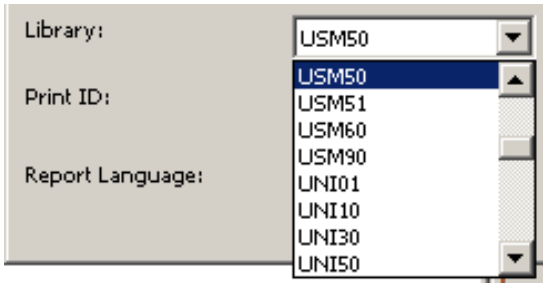
Here is an example of a service which is accessed from the Acquisitions GUI, Claim Reports and Letters for Monograph Orders (acq-12):





Library Field

Every service contains a Library field. You select the library on which you wish to run the service from the drop-down list of libraries made available by the System Librarian:

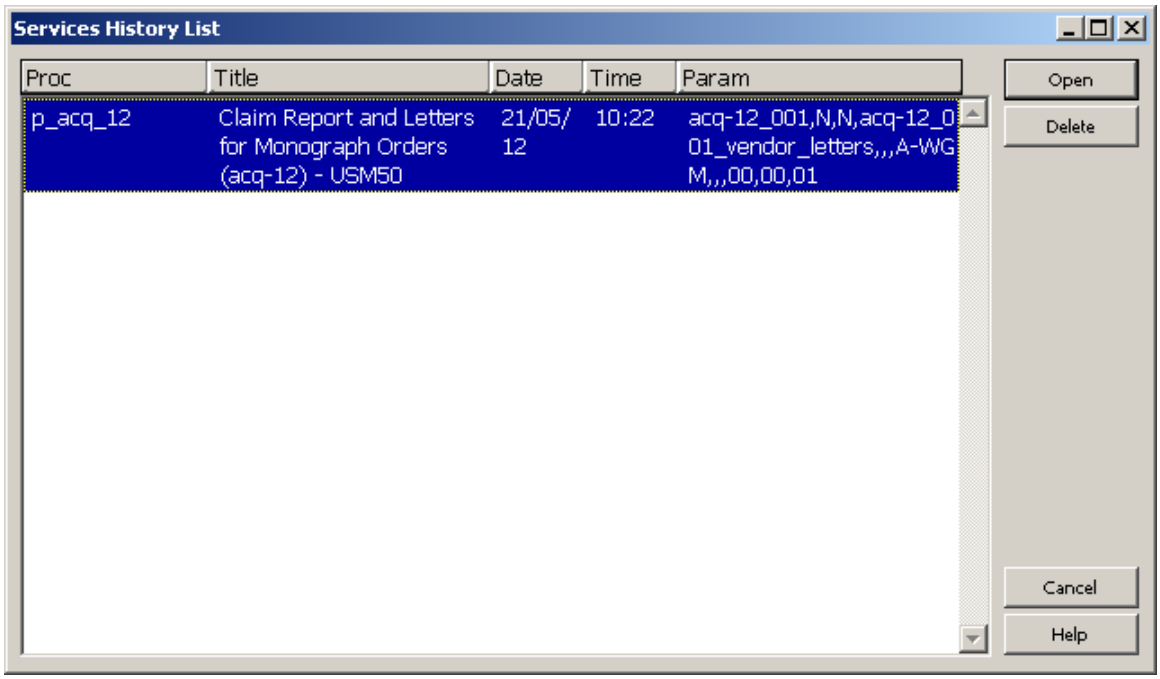


Report Language

Every service that creates an output report includes a Report Language field. This field enables you to set the language to be used for the printout report. This lets you use different language templates for each report.

Services History

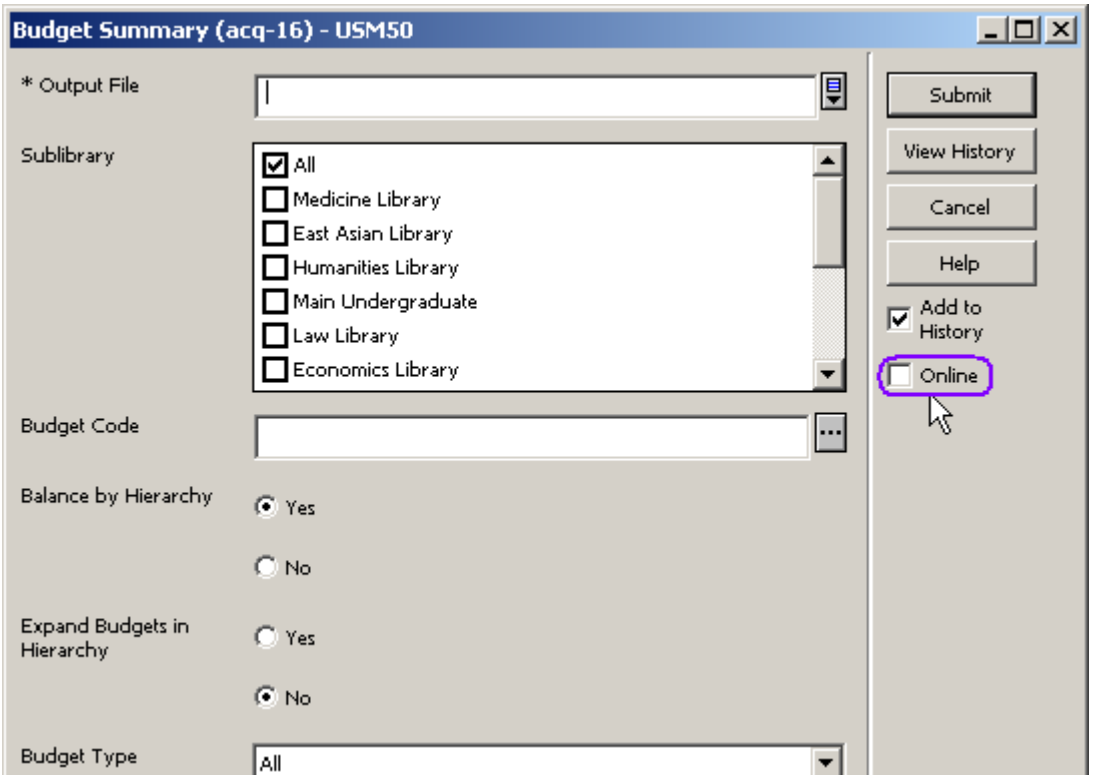
The Services History dialog, activated from the History command on the Services menu, displays services that have been run on the active (connected) library only:



When running a service on a library different than the active library (chosen from the Library field), you must connect to this library in order to see it in the History dialog.

Online Check Box

Some services have a check box named **Online**:



When this check box is selected, the job will be run immediately from the GUI in online mode, thereby circumventing the batch queue.

See the section Setting the Online Check Box in Services in the System Librarian chapter for more details.

Add to History

When this check box is selected, the run of the batch will be saved in the Services History List. The user will be able to perform the same run again, without filling in all the parameters.

Print to ADM Lib

All the bibliographic library services under the Cataloging module contain an option to choose the input from the administrative library and to put the service's output files into the administrative library.

This option is available when the Print to ADM Lib check box is selected.

Print Templates

For a complete guide to working with print templates, see the Customizing Printouts (XML and XSL) document, available from the Ex Libris Documentation Center

Special Characters

You can insert any character in the GUI services by adding the characters \% and the Unicode value for the symbol. For example, to insert a caret ^ insert \%5E.