



# System Librarian's Guide - Circulation

Version 23

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## 1. Patrons in a Multi-ADM Environment

In a multi-ADM environment, each ADM library can define whether its patron records (Z303, Z304, Z308, Z353) will participate in the shared or the non-shared section of the database (USR00).

The USER-SHARING variable in `tab100` of each library's `tab` directory defines whether it participates in the shared environment. If the ADM library has defined USER-SHARING=Y, then the patrons created by this library will appear in the Patron List when a staff user is connected to ANY library that is defined as Y in the USER-SHARING variable.

Patrons belonging to an ADM library which has defined the variable USER-SHARING=N in `tab100` will not be included in this Patron List. If the ADM library defined USER-SHARING=N, then the patrons created by this library will appear in the Patron List only when a staff user is connected to this specific library.

When new patrons are created, the following rules always apply:

- Whether or not logins and passwords are automatically created based on system counters depends on the variables DEFAULT-BOR-ID, DEFAULT-BOR-ID-1, DEFAULT-BOR-VERIFY-1 and DEFAULT-BOR-VERIFY-2 as defined in the ADM library `tab100` table.
- If the system is set to automatically create login and passwords, it will first try to use the ADM library counters `last-bor-id`, `last-bor-id-1`, `last-bor-verify-1` and `last-bor-verify-2`. If the relevant counters are not found in the ADM library, the `usr_library` counters will be used.

## 2. Item Material Types

Define the types of materials (books, periodicals, etc.) that are available in your library system.

In order to define material types, complete the following steps:

1. In terminal mode, select an administrative library. After you have completed all the steps below, choose another administrative library and complete the steps again. Follow this procedure until all administrative libraries have been covered.
2. Edit `tab25.lng`. This table enables you to list the material types available in your library. Remember that the option ISSUE has a special functionality related to the Serials module.
3. Test the system to make sure that the English language version works properly.
4. Translate `tab25.lng`, which you edited in English in Step 2 above, in order to list material types in the language appropriate for your patrons. Translate the

table.

Translate only the description and not the code for the material type.

### 3. Sublibraries

Define valid sublibraries using the `tab_sub_library.lng` table. This table also sets up information that is used by three other tables (`tab15`, `tab16` and `tab17`) and should therefore be filled in together with the other tables.

Following is a sample from the table:

```
! 1 2 3 4 5 6 7 8 9
10
!----!-!-----!-!-----!-----!-----!-----!-----
-!-----!
UARC 4 USM50 L Archives Library 15A UARC UARC
UARC
UELEC 1 USM50 L Electronic Resources 15A UELEC UELEC
UELEC
URLEC 4 USM50 L UELEC Reading Room 15A UELEC UELEC
UELEC
UGDOC 1 USM50 L Government Documents 15A UGDOC 17A
UGDOC
URDOC 4 USM50 L UGDOC Reading Room 15A UGDOC 17A
UGDOC
UEDUC 1 USM50 L Education Library 15A 16A 17A
UEDUC ALEPH
UHLTH 1 USM50 L Health Library 15A 16A 17A
UHLTH ALEPH
ULAW 1 USM50 L Law Library 15A 16A 17A ULAW
ALEPH
```


Key to Table:

- **Column 1:** Enter here the sublibrary code being defined. To define all sublibraries of a particular ADM library, enter first the code of the ADM library. When you want to define a sublibrary for a global patron (that is, the patron is not assigned to a specific sublibrary), enter the code *ALEPH*.
- **Column 2:** Enter the code for the sublibrary type:
  - 1 - full sublibrary (patron and items)
  - 2 - patron sublibrary only (not used for items)
  - 3 - special (for photocopy and hold requests delivery site, for example, HOME or BOX)
  - 4 - reading room sublibrary (for requests that are delivered to the Reading Room)

- 5 - ordering unit (for Acquisitions)
- **Column 3:** Enter the code of the ADM library to which the sublibrary in column 1 belongs. Leave column 3 blank if column 1 contains the code for the ADM library or the ALEPH global library.
- **Column 4** is the Alpha code for the character set of the menu choice. The standard is L, which stands for Latin.
- **Column 5** is the name of the sublibrary as it will appear in the Web and GUI interfaces. In order to define library names for the WEB Opac use table `tab_www_item_desc.eng`.
- **Column 6:** The Group ID identifies the section in `tab15` that is relevant for this sublibrary. Type here the Group ID that should be entered in column 1 of `tab15` (the table for item statuses). This allows for the definition of common statuses in `tab15` that are used by a number of sublibraries. It would mean that only the item statuses that belong to the group ID are valid for use in that sublibrary.
- **Column 7:** The Group ID identifies the section in `tab16` that is relevant for this sublibrary. Type here the Group ID that should be entered in column 1 of `tab16` (the table for due dates, fines and limits). It means that the only definitions valid for this sublibrary are those that relate to this group ID.
- **Column 8:** The Group ID identifies a group of sublibraries that share a set of open/close hours. Type here the Group ID that should be entered in column 1 of `tab17` (the table for library hours). It means that this sublibrary relates to the opening hours set in this group ID.
- **Columns 9-11:** Items belonging to the sublibrary defined in column 1 may be borrowed by patrons that have borrowing privileges in the sublibraries shown in columns 9-11. The order in which the system checks the patron records is determined by the order in which the sublibraries appear in columns 9-11.

### 3.1. Loaning and Returning Items per Sublibrary.

In ALEPH, the loan and return of items from a specific sublibrary is not controlled via the staff user names and passwords (in the Staff Privileges option) but rather via the IP identification of the PC or a special ALEPH Station ID.

To identify the Station ID for a PC, in Windows Explorer (checked for Windows NT and Windows 2000), right-click My Computer, then click **Properties>Network Identification>Properties**. The station ID appears in the Computer Name field. To identify and set the special ALEPH Station ID, right-click the  button at the right of the status bar, then click **Set Workstation Identifier**.

This mechanism for controlling loan and return for specific sublibraries is contained in the \$data\_tab/tab\_attr\_sub\_library table. This table defines, for a particular workstation, or group of workstations, which sublibraries come under its jurisdiction. It lists the sublibrary relationships based on station ID / IP address with regard to loan/return, cash and reading room management. For example:

```

!           1           2   3           4           5           6           7
!!!!!!!!!!!!!!!!!!!!!!!!!!!!-!-!!!!!!-!!!!!!-!!!!!!-!!!!!!-!!!!!!>
10.1.555.125      1 WID    LAW    MUS    HYL    USM50
                  1 HIL    GDOC5 MED
                  3 WID    LAW    MUS    HYL    USM50
                  3 HIL    GDOC5 MED
                  4
                  5 USM50
                  6
                  7
                  8

```

Key to the tab\_attr\_sub\_library table

- **Column 1** - Station identification (Station ID or IP address). Column 1 can have asterisks, such as:  
     10.1.555.\* for sub library a  
     and  
     10.1.555.\* for sub library c
- **Column 2** – Attribute type. Two attributes are relevant for loan and return:  
     1 - item can be loaned and returned  
     2 - item can be returned
- **Columns 3, 4, and so on** - Sublibrary names.

## 4. Item Statuses

You need to define the statuses that may be assigned to items (copies) and various conditions related to each status, such as whether an item:

- can be loaned
- can be renewed
- can be available for hold and photocopy requests
- will be displayed in the Web OPAC

In order to define item statuses, complete the following steps:

1. In terminal mode, select an administrative library. After you have completed all the steps below, you should choose another administrative library and

complete the steps again. Follow this procedure until all administrative libraries have been covered.

2. Edit `tab15` in English to define the statuses that may be assigned to items (copies) and various conditions related to each status. You must first edit the English version of this table and only later translate the table (see below).
3. Test the system to make sure that the English-language version works properly.
4. Translate `tab15` in order to list item statuses in the language appropriate for your patrons.

Following is a sample from the `tab15` table:

```

! 1   2   3   4           5                                6 7 8 9 1 1 1 1 1 1 1 1
!                                           0 1 2 3 4 5 6 7
!!!!-!!!-!!!-!!!-!!!!!!-!!!-!!!-!!!-!!!-!!!-!!!-!!!-!!!-!!!-!!!-!!!
HIL   ## BD L At bindery                                Y N Y N Y Y N N N 00 Y A
HIL   ## BP L Bindery prep                              Y Y Y N Y Y N N N 00 Y A
HIL   ## CA L Cancelled                                 Y N N N N Y N N N 00 Y A
HIL   ## CL L Claimed                                   Y N N N N Y N N N 00 Y A
HIL   ## CT L Cataloging                               Y Y Y N Y Y N N N 00 Y A
HIL   ## MI L Missing                                  Y N Y N Y Y N N N 00 Y A
HIL   ## MS L Lost                                     Y N N N Y Y N N N 00 Y A
HIL   ## NA L Not arrived                              Y N N N N Y N N N 00 Y A
HIL   ## NP L Not published                            Y N N N N Y N N N 00 Y A
HIL   ## OI L Order initiated                          Y N N N N Y N N N 00 Y A
HIL   ## OR L On order                                 Y N Y N Y Y N N N 00 Y A
HIL   ## RE L Ordered--received                       Y N Y N Y Y N N N 00 Y A
HIL   92 HD L Depository                               Y Y N N Y Y N Y Y 00 Y A
HIL   28 HD L 28-day loan (depository)                 Y Y C N Y Y N Y Y 00 Y A
HIL   28 ## L 28-day loan                              Y Y Y N Y Y N Y Y 00 Y A
HIL   04 ## L Restricted loan                          Y Y N N Y Y N N N 00 Y A
HIL   02 ## L In-library use                           Y Y C N Y Y N N N 00 Y A
HIL   01 HD L Regular loan (depository)               Y Y C Y Y Y N Y Y 00 Y A
HIL   01 ## L Regular loan                             Y Y Y Y Y Y N Y Y 00 Y A

```

**Key to Table:**

- **Column 1:** Group ID for group of definitions. In the above example, there is one group of definitions. You can create as many groups as you want. By entering the Group ID in column 6 of the `tab_sub_library` table, a number of different sublibraries can use the same group of definitions. Be sure that you fill in the `tab15` table together with the `tab_sub_library` table.
- **Column 2:** Item status code. This is the code by which the system identifies the status. The code must be unique within one group, but does not have to be unique across groups. This means that the same status code may have different meanings in different groups. The status code must be two digits. For example, for status number 1, enter `01`. Note that you may NOT use status code `00`.
- **Column 3** is the two-character code for the item's process status.

- **Column 4** is the code for the character set of the column heading. The standard is L, which stands for Latin.
- **Column 5:** Item status name. Enter here the name of the status, such as *overnight* or *one week*. The name may be up to 15 characters long.

Note: In the GUI-Item Form-Item Status drop-down list: If in `tab15` there is more than one occurrence of the same item status code (of the same Group ID), the drop-down menu of the Item Status field will display the Item Status Name of the line that has `##` in the Process Status column rather than the Item Status Name of the first occurrence of that item status code.

- **Column 6:** Can be loaned. Determine whether or not items with this status may be loaned. Enter *Y* for Yes or *N* for No.
- **Column 7:** Can be renewed. Determine whether or not items with this status can be renewed. Enter *Y* for Yes or *N* for No.
- **Column 8:** Hold requests. If the item is on an open shelf (*Y*), the system will check to see if the item is available when a hold request is placed. If the item is available but the patron does not have permission to place a request on an available item, a message will be displayed. If the item is out on loan, the system will place a hold request for the item.

If the item is in a closed stack (*C*), hold requests are always allowed. If the item cannot be requested (for example, lost, permanently shelved outside the library, privately held, etc.), enter *N*. Availability will not be checked and no hold request will be placed for the item.

Options “T” and “R” may be used for items that can be requested but have not yet been made available for circulation. In both cases, requesting the item will be allowed even though the item is not registered as checked out. The `p_cir_12` (print request slips) and `ue_06` (online printing of request slips) jobs consider the item as not available.

The “R” option causes the hold request submission to trigger the creation of a cataloging trigger, which is used to indicate to the Cataloging department that the cataloging of the item should be prioritized. In addition, the hold request submission is blocked if the requested item has available like items.

The “U” option is also for items that have not been registered in the system. If this option is configured, when a privileged patron requests the item, a new temporary item is created. The request is placed on the new temporary item.

For more information see **Requesting Unbarcoded Items** on page 54.

- **Column 9:** Available for photocopy requests. If you want a patron to be able to put a photocopy request on the item, and the item is accessible to the patron enter *Y*. If the item cannot be requested, or is unavailable for photocopy requests (because, for example, the item is lost, permanently shelved outside the library, privately held, etc.), enter *N*.
- **Column 10:** Display item in Web OPAC. Determine whether or not the item will appear in the Web OPAC when the patron searches for items. Enter *Y* or *N*. If set to *N*, advance booking slots for this item are not created. (Note: the item is always displayed in the GUI.)
- **Column 11:** If this item is requested in the Web OPAC, the patron will be given this specific item and not another copy. Enter *Y* or *N*.
- **Column 12:** Limit the number of hold requests that may be made for an item. If *Y* is entered, the number of hold requests is limited to the number of copies.
- **Column 13:** Recall. Enter *Y* if a recall is allowed. Otherwise enter *N*.
- **Column 14:** Rush Recall. Enter *Y* if a rush recall is allowed. Otherwise enter *N*.
- **Column 15:** Reloaning Limit. The value denotes the number of hours during which a patron is not allowed to reloan the same copy of an item counting from the time he returned it. Use "00" or " " (blanks) for unrestricted reloaning. If the item has been loaned to another patron in the meantime, there is no restriction in any case.
- **Column 16:** Controls Booking permission. Enter *Y* when Booking is possible, *N* when Booking is not possible, *O* if Booking is possible only during open hours, and *C* if Booking is possible only during closed hours.
- **Column 17:** Controls Booking hours. Enter *A* if Booking is possible at all times (both open and closed hours), *O* if Booking is possible only during open hours, and *C* if Booking is possible only during closed hours.

## 5. Patron Statuses

Define the statuses that may be assigned to patrons and various conditions related to each status, such as whether the patron may:

- Borrow items
- Renew items
- Place hold and photocopy requests
- Place multiple hold requests



- Request items that are on the shelf.
- Request to receive an item in the reading room
- Book an item that is not available for all.

In addition, you can define the patron's:

- Cash balance limit
- Expiration date of library privileges
- Hold request priority

You can also define whether, for a particular patron status:

- The system will check for restrictions before loaning an item to the patron.
- The librarian may override restrictions (such as fines due) on the patron's ability to borrow an item.
- The system will ignore late returns and not charge the patron a fee.
- The patron will be charged for photocopy requests.
- The patron's details will be displayed in the OPAC where an item that is checked out to the patron is displayed.
- The system will ignore library open hours restrictions when booking an item.
- A default ALEPH Z305 record will be created when the patron is registered at the sublibrary.

In order to define patron statuses, complete the following steps:

1. Edit `tab31`. This enables you to define the statuses that may be assigned to patrons and various conditions related to each status. This is not a language-sensitive table, which means that there is no need to translate it later. You can assign specific patron statuses to a specific sublibrary. When an attempt is made to use these statuses in other sublibraries, a message will appear.

Whenever the patron is assigned the first local record, the system automatically creates an ADM level record for the patron. Automatically creating an ALEPH record depends on the setup of `tab31`, in column 22. You can create an overall definition of privileges that will be globally used whenever an ADM level or an ALEPH record is created for any patron status. Do this by defining a line with the ADM code or with ALEPH in the sublibrary column.

Note that if an ALEPH record is to be created, the patron status with which this record will be created depends on the patron status that is being registered and the mapping that is defined in `tab_map_privileges`.

2. Edit `pc_tab_exp_field.eng` (in English). This table enables you to define the menu options that appear whenever the librarian needs to choose a patron status. Therefore, the list of patron status names (as opposed to patron status codes) in `pc_tab_exp_field.eng` must correlate with the patron status codes defined in `tab31` (step 2 above). In the `pc_tab_exp_field.eng` table, the code that identifies the correct menu is *BOR-STATUS*. If you want the drop-down

list to be sublibrary-sensitive, place the BOR-STATUS lines only in `pc_tab_exp_field_extended.eng`. The file `pc_tab_exp_field_extended.eng` can be edited.

You must first edit the English version of this table and only later translate the table (see below).

3. Test the system to make sure that the English-language version works properly.
4. Translate `pc_tab_exp_field.eng`, which you edited in English in Step 3 above, in order to provide menu options in the language appropriate for your patrons.

## 6. Due Dates, Fines and Limits

Due dates are computed daily for combinations of item/patron status, and take into account days on which the library is closed.

The results of the computation may be viewed in the GUI Circulation module by choosing the *Dates* option on the Main Menu and then *Setup for Future Loans* from the drop-down menu. Specific due dates may be changed by the librarian by using this Setup function. The changed date will stay in effect only until the next day, after which the due dates are re-computed.

There are two prerequisites that must be met before you can define due dates:

### Prerequisite 1:

#### Define Item Statuses

Before defining due dates, you must already have defined item statuses. If you have already completed Prerequisite 1, skip to Prerequisite 2.

### Prerequisite 2:

#### Define Patron Statuses

Patron statuses indicate the privileges allowed for each type of patron.

### Steps for Defining Due Dates, Fines and Limits

Once the prerequisites have been met, define due dates by completing the following steps:

#### Step 1: Select a Library

In terminal mode, select an administrative library. After you have completed all the steps below, you should choose another administrative library and complete all the steps again. Follow this procedure until all administrative libraries have been covered.

#### Step 2: Define Rules for Due Dates

Use tab16 in the ALEPHADM GUI module to edit tab16 to define rules for computing due dates, fines and borrowing limits. Following is a sample from the table (it is broken into two sections because the table is very wide).

```

!
! 1 2 3 4 5 6 7 8 9 10 11 12 13 4 5 16 7 18
!!!!-!!!-!!!-!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-
HIL 28 ## 12 + 00000028 03 A 2359 0000 00050 999 999 D + 00000014 A 2359

19 20 21 22 23 24 25 26 2728
!!!-!!!-!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!
007 014 05 28.0000000 999

```

**Key to Table:**

**Note:** You may enter up to 200 active lines per group ID in this table.

- **Column 1:** Group ID for group of definitions. In the above example, there is one group of definitions. You may create as many groups as you want. By entering the Group ID in column 7 of the `tab_sub_library` table, you can have a number of different sublibraries use the same group of definitions. Be sure that you fill in the tab16 table together with the `tab_sub_library` table.

Item status "99" is used for defining the maximum overall number of loans/holds/bookings for a particular patron status in a sublibrary or for all patron statuses if you use ## in the patron status column. It overrides any other maximum number defined for the patron for a particular item status.

Item status "98" is used for defining the maximum overall number of loans/holds/bookings for a particular patron status in a group of sublibraries or for all patron statuses if you use ## in the patron status column. The total number of loans/holds/bookings in all the sublibraries that belong to the same group as the sublibrary from which the item is being loaned/requested/booked must not exceed the limit set in the "98" line.

Item statuses "99" and "98" must be repeated for every group ID or for every patron status within the group ID if there are differences. They must be the last line in the group (for example, GEN).

- **Column 2:** Item status code. Enter here one of the item status codes defined in one of the groups of `tab15`. Enter ## for ALL item status codes.
- **Column 3:** Item process status code. Enter here one of the item process status codes defined in `tab15`. Enter ## for ALL.
- **Column 4:** Patron status code. Enter here one of the patron status codes defined in `tab31`. Enter ## for ALL.
- **Column 5:** Method of computing due date. If you want to specify an actual due date, enter A. To define the due date by adding a specific number of days to the date on which the item is loaned, enter +.

- **Column 6:** Due date. If you entered A in column 5, then enter a specific due date here in the format *yyyymmdd*. If you entered + in column 5, then enter the number of days to be added to the loan date. You must enter 8 digits. For example, to add 2 days to the loan date, enter *00000002*. If you want the item to be returned on the same day it is borrowed, enter *00000000* (8 zeros). Short loan items also need to be defined with *00000000* (8 zeros). The maximum you can add is 999 days. For any number higher than that, digits representing thousands and higher will be disregarded; that is, if you enter 3650 days, the value taken will be 650.
- **Column 7:** Grace days for late return. Type the number of days you will allow the item to be late before the patron is fined. Note that you may use a combination of grace hours and grace days. To enter only grace hours, enter *00* in the days field.
- **Column 8:** Method of computing due hour. To specify an actual due hour, enter A. If you want to define the due hour by adding a specific number of hours to the hour on which the item is loaned, enter +.
- **Column 9:** Due hour. Enter an actual hour (according to a 24-hour clock) or to add a specific number of hours to the current hour, according to the definition in Column 8. To add a specific number of hours to the current hour, you must enter 4 digits. For example, if you want to add 5 hours, enter *0500*.
- **Column 10:** Grace hours and minutes for late return. Type the number of hours you will allow the item to be late before the patron is fined. Note that you may use a combination of grace hours/minutes and grace days. If you want to enter only grace days, enter *0000* in the hours field.
- **Column 11:** Fine rate. Fines are given per day overdue. The total fee is the fine rate multiplied by the number of days overdue.

The fine rate has 5 digits and should be entered as though a decimal point exists before the last two digits. For example, *00025* means the days should be multiplied by *0.25* (for example, 25 cents).

Note: Column 11 works in conjunction with column 14 of this table. Column 14 sets whether the fine is calculated per day or per hour, and whether the time that the library is closed is taken into account when the fine is calculated. If you want an hourly fine, the sum registered here must be the amount per hour x 24 (no. of hours in a day). For example, if you want to charge 0.50 per hour, you must set the amount in this column to 01200.

If you want a fine by minutes, the sum registered here must be the amount per minute x 1440 (no. of minutes in a day). For example, if you want to charge 0.10 per minute, you must set the amount in this column to 14400.

- **Column 12:** Maximum number of items. Enter the maximum number of items that may be borrowed by this combination of item status and patron status. Note that you must enter two digits, for example, 05 for 5 items.
- **Column 13:** Maximum number of hold requests. Enter the maximum number of hold requests that may be made by this combination of item status and patron status. Note that you must enter two digits, for example, 05 for 5 hold requests.
- **Column 14:** Fine method. This column works in conjunction with Column 11. Use one of the following values:
  - **0 - No fine charged**
  - **A - Open minutes** - The fine is calculated per minute overdue, and does not include the minutes that the library was closed.
  - **1 - Open hours** - The fine is calculated per hour overdue, and does not include the hours that the library was closed. If the patron returns an item one minute late, he will be charged for being one entire hour late.
  - **2 - Open days** - The fine is calculated per day overdue, and does not include the days that the library was closed. If the patron returns an item one minute late, he will be charged for being one entire day late.
  - **B - Total minutes** - includes the minutes that the library was closed, for example, if a patron returns a book 30 minutes after the due hour, he is fined for 30 minutes, even if the library has been closed for part of the period in which the loan became overdue.
  - **R - First day fixed, then open days.** This method levies a fixed fine of 2.00 for the first day and then continues to calculate like fine method 2 for all further days.
  - **3 - Total hours** - includes the hours that the library was closed. If the patron returns an item one minute late, he will be charged for being one entire hour late. If the patron returns an item that was due Friday on the

subsequent Monday, and the library was closed Saturday and Sunday, the patron is nevertheless charged for Sat.-Sun.-Mon. If at 9 a.m. a patron returns a book that was due the previous evening at 5 p.m., he is charged for all the hours in that period, even if the library was closed.

- **4 - Total days** - includes the days that the library was closed. If the patron returns an item one minute late, he will be charged for being one entire day late. If the patron returns an item that was due Friday on the subsequent Monday, and the library was closed Saturday and Sunday, the patron is nevertheless charged for Sat.-Sun.-Mon.
  
- **5 - Overlapping blocking date** - This option blocks a patron from borrowing any items, without charging him a fee for overdue items, blocking him for the longest overdue period when a group of books is returned at the same time. For example, if the patron returned three books late and one book was 3 days late, one book was 7 days late, and one book was 14 days late, you can have the system block the patron from borrowing additional items for a period of **14** days. This is "overlapping" blocking. The longest overdue period is used to determine how long the patron is blocked. The block starts when the items are returned. The number of days that should be blocked because of each late return can be multiplied by a value set in the tab100 BLOCK-RATION variable. For example, if a 14 day block is calculated, setting the tab100 variable BLOCK-RATION to 2 will cause the block to be 28 days long.
  
- **6 - Cumulative blocking date** - This option blocks a patron from borrowing any items, without charging him a fee for overdue items, for a time which matches the total amount of time of all overdue books. For example, if the patron returned three books late and one book was 3 days late, one book was 7 days late, and one book was 14 days late, the system blocks the patron from borrowing additional items for a period of **24** days. This is "cumulative" blocking. The overdue periods are added together. The block starts when the items are returned. The number of days that should be blocked because of each late return can be multiplied by a value set in the tab100 BLOCK-RATION variable. For example, if a 14 day block is calculated, setting the tab100 variable BLOCK-RATION to 2 will cause the block to be 28 days long.

- **7 - Include recall** - This option calculates overdue fines taking into consideration the fact that the item has been recalled. Two debit transactions are created:
  1. A late return fee - calculated according to method 4 (total days).
  2. A multiplication of the fine with a recall/rush recall factor that is defined in tab18.lng (cash transaction codes 50 and 51).
- **C** - This option calculates overdue fines taking into account the fact that the item has been recalled. Two debit transactions are created:
  1. A late return fine calculated according to method 1 (the library's open hours).
  2. A multiplication of the fine with a recall/rush recall factor that is defined in tab18.lng (cash transaction codes 50 and 51).
- **D** - Similar to method C except that the basic fine is calculated in relation to method 2 (the library's open days).
- **E** - Similar to method C except that the basic fine is calculated in relation to method 3 (total hours - open and closed).
- **F** - Total days by intervals - This method uses the intervals set up in the new `tab_late_return` table to calculate fines. The sums set up in this table are treated as an actual amount and not as a ratio per day.
- **8** - This option combines fine 5 and a monetary fine according to the value set in col. 11. The patron is blocked for a certain period and has to pay a fine before he can effect a transaction again. The fine is calculated according to total days.
- **9** - This option combines fine 6 and a monetary fine according to the value set in col. 11. The patron is blocked for a certain period and has to pay a fine before he can effect a transaction again. The fine is calculated according to total days.

- **Columns 15-18:** These four columns allow you to define alternate due dates/hours for items that have hold requests. Now, if a patron checks out an item that has more hold requests on it than the number defined in column 28 of this row, the due date/hour that will be assigned will be the alternate one, not the original one. If no alternate due date/hour is defined in this table, the original one will be used. The system may be configured to display a message when using the alternate due date by setting column 4 of message 1020 in \$Saleph\_root/error\_lng/pc\_messages to Y.
- **Column 15:** Method of computing due date (for items with hold requests). To specify an actual due date, enter *A*. To define the due date by adding a specific number of days to the date on which the item is loaned, enter *+*.
- **Column 16:** Due date (for items with hold requests). If you entered *A* in column 15, then enter a specific due date here in the format *yyyy/mm/dd*. If you entered *+* in column 15, then enter the number of days to be added to the loan date. You must enter 8 digits. For example, if you want to add 2 days to the loan date, enter *00000002*. If you want the item to be returned on the same day it is borrowed, enter *00000000* (8 zeroes).
- **Column 17:** Method of computing due hour (for items with hold requests). To specify an actual due hour, enter *A*. If you want to define the due hour by adding a specific number of hours to the hour on which the item is loaned, enter *+*.
- **Column 18:** Due hour (for items with hold requests). You may choose to enter an actual hour (according to a 24-hour clock) or to add a specific number of hours to the current hour, according to the definitions in Column 17. To add a specific number of hours to the current hour, enter 4 digits. For example, to add 5 hours, enter *0500*.
- **Column 19:** Recall period. This is the period in days that the library gives the patron for the return of a recalled item (assuming the minimum guaranteed loan period (column 20) has already passed or it is a rush recall). This period should be calculated according to the estimated time it would take the letter to reach the patron and the time it would take the patron to return the item to the library.
- **Column 20:** Minimum guaranteed loan period. This is the period in days that the original patron is allowed to have the item on loan, even if the item has been requested by another patron and recalled. This period is ignored when the recall is a rush recall.
- **Column 21:** Maximum number of renewals. Enter a value from *00* to *09*. Renewals can be limited up to 8; enter *09* to define that renewals



are unlimited. To limit renewals by period rather than by number, enter 09 in this column, and use column 22.

- **Column 22:** Total loan period, including all renewals and the original loan period. Enter *D* for days, *W* for weeks or *M* for months, then enter the number of permitted days, weeks or months. You must enter 3 digits for the number. For example, for 3 days, enter *D003*.
- **Column 23:** Maximum fine. Enter up to two decimal places. The field should be left-aligned.
- **Column 24:** Minimum fine. Enter up to two decimal places. Fines below this amount will be treated as zero amount fines. The field should be left-aligned.
- **Column 25:** Fixed amount to be added to any fine. Enter up to two decimal places. The field should be left-aligned.
- **Column 27:** Adjust Due Date and Hour. Enter one digit. Use one of the following values when calculating the due date:
  - **0** - Adjust a due hour which is after closing time to the closing time (if the due date is an open day), or to the closing time of the *next* open day (if the due date is a closed day).
  - **1** - Adjust a due hour which is after closing time to the closing time (if the due date is an open day), or to the closing time of the *previous* open day (if the due date is a closed day).
  - **2** - Do *not* adjust due hour if the due date is an open day; if the due date is a closed day, find the *next* open day. This is the default value in the event that `tab16` cannot be read or if this column has an invalid value (that is, other than 0, 1, 2 or 3).
  - **3** - Adjust a due hour which is after closing time to the *next* open day's opening hour.

The column is sensitive to sublibrary and item status.

- **Column 28:** Item requested threshold. If an item has this number of active hold requests, it will be considered requested for the purpose of using columns 15-18 for setting its due date. The system may be configured to display a message when using the alternate due date by setting column 4 of message 1020 in `$aleph_root/error_lng/pc_messages` to Y.

### Step 3: Define Library Hours

Edit `tab17`. This table enables the system to set new due dates for items that would otherwise be due on days or at hours when the library is closed.

Note that there is an easy-to-use interface in the Circulation GUI for the editing of this table - the Library Open Hours Management Interface which is accessible from the Circulation GUI's Loan Tab. Below is an explanation of how to define the library open hours by editing the tab17 table directly.

In the following example, specific days on which the library is closed appear before the general definition of the library's opening hours:

```

! 1          2      3  4    5    6              7
!!!!-!!!!!!-!!-!!-!!!!-!!!!-
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!>
17A  20060501    C          Comment - May First
17A  #####06##  O 1000 1300 Comment - summer vacation
17A  #####07##  O 1000 1300
17A  #####08##  O 1000 1300
17A  #####09##  O 1000 1300

```

**Key to Table:**

- **Column 1:** Group ID for group of definitions. In the above example, there is one group of definitions. You may create as many groups as you want. By entering the Group ID in column 8 of the tab\_sub\_library table, you can have a number of different sublibraries use the same group of definitions. Be sure that you fill in the tab17 table together with the tab\_sub\_library table.
- **Column 2:** The dates are written in the format yyymmdd. For example 19990714. You may use the # character as a wildcard for dates. For example, #####0714 indicates July 14th of any year. ##### indicates any date.
- **Column 3:** Day of the week. Sun=00, Sat=06.
- **Column 4:** Enter C for Closed; O for Open.
- **Column 5:** Fill in this column if you entered "O" in column 4. Column 5 is the hour that the library opens. The system uses a 24-hour clock, so if the library opens at 9 AM, enter 0900.
- **Column 6:** Fill in this column if you entered "O" in column 4. Column 6 is the Hour that the library closes. The system uses a 24-hour clock, so if the library closes at 5 PM, enter 1700.

Note that a library open hours may be configured so that closing time is after midnight. In that case, the closing hour will be configured as the real hour +24. For example, if the library opens on Friday morning at 9 A.M. and closes at 2.A.M the following day, the tab17 line will be configured as:

```
17A  ##### 05 O 0900 2600
```

**Step 4: Deciding Whether or Not the Patron's Expiration Date Influences a Due Date**  
 In tab100, you can set a variable to determine if a patron's expiration date shortens a loan period if the due date is later than the patron's expiration date.

The line is:

BOR-EXPIRY-DUE-DATE

and the options are Y/N/H.

#### Step 5: Deciding if the Library's Closing Hour will Adjust the Due Hour

The due hour can be changed according to the library's closing hour. This is determined by `tab16`, column 27 'Adjust Due Date and Hour', which has four possible parameters.

For example, the library's working hours are 8:00 - 17:00 and the due hour is 23:59.

- If the variable is set to 0, the due hour will be set to 17:00, or to 17:00 the next open day (if the due date is a closed day).
- If the variable is set to 1, the due hour will be set to 17:00, or to 17:00 the previous open day (if the due date is a closed day).
- If the variable is set to 2, the due hour remains 23:59.
- If the variable is set to 3, the due hour will be set to 8:00 of the next open day.

#### Step 6: Rounding and Factoring Fines

The system provides the option to round up/down the fine amount. In addition, you can define a multiplication factor for the fine rate set in `tab16`, column 11. This is useful for countries whose currencies are written in the thousands (for example, 10,000 lira).

Following are the relevant parameters in the `aleph_start` table:

```
setenv fine_factor_fix      000
setenv fine_rounding       Y
```

#### Step 7: Determine if "No Fine" Transactions will be included in the List of Cash Transactions

You can determine whether or not the system will display transactions for which no fine (zero amount due) was charged. To do this, edit `tab18.lng`. enter Z in col. 5, So that "no fine" transactions will not be included in the List of Cash Transactions.

#### Step 8: Define Lost Material Charges

To define lost material charges, edit `tab34`. This table defines the charges to be added to the patron's cash record when an item is lost. (An item is defined as lost by the librarian using the GUI Circulation module, or automatically by the system (`tab32`) after the maximum number of overdue notices has been sent.)

Following is an example from the `tab34` table. (Note that the widths of columns 4, 6 and 9 have been shortened in this example.)

LIT	## ##	#	#	#####	#####	15.00	0.00	75.00
MED	## ##	#	#	#####	#####	22.00	30.00	120.00
MUS	## ##	#	QA45.62	#####	#####	0.00	75.00	75.00

WID 01 03 4 PE.25# GEN ISSBD 10.00 20.00 30.00

Key to Table:

- **Column 1:** Sublibrary. Use ##### for "all sublibraries."
- **Column 2:** Item status (from tab15). Use ## for all.
- **Column 3:** Patron status (from tab31). Use ## for all.
- **Column 4:** Identifier of the call number type. Use ## for all
- **Column 5:** Call Number. Enter a specific call number. Specifying a range is done by using a # mark to separate the 'From Call Number' from the 'To Call Number'. For example "ABC#DEF" means 'from call number ABC to call number DEF.

For all call numbers, use only one # in the first position of the column.

- **Column 6:** Collection. Use ##### for all.
- **Column 7:** Item Material Type. Use ##### for all.
- **Column 8:** The charge for sending a notice. You may use up to two decimal places. You may enter, for example, *10*, *10.0*, or *10.00*.
- **Column 9:** Handling charges. You may use up to two decimal places. You may enter, for example, *10*, *10.0*, or *10.00*.
- **Column 10:** Fixed price for replacing the item. You may use up to two decimal places. You may enter, for example, *10*, *10.0*, or *10.00*.

Column 10 can be set to use the value set in Z30-PRICE of the lost item. This is done by prefixing the fixed value with "I". If Z30-PRICE is a decimal number other than zero, it will be used as the replacement cost. If not, the value in Column 10 will be used.

- **Column 11:** Not yet implemented (MARC price).
- **Column 12:** Not yet implemented (patron factor).

**Note:** When an item is registered in the GUI as "Lost", the librarian has the option to manually change the replacement price charged for the lost item.

Step 9: Define the Effective Due Date in Printouts and GUI HTML Information  
In XML-XSL printouts and in GUI HTML information (based on templates defined in ./xxx50/pc\_display\_eng), z36-due-date can be translated into the "effective due

date" by defining the following setting in a .trn file (./xxx01/form\_eng/global.trn or a specific translation file):

```
!                                     M
!                                     /
!Tag                                Type    S Parameters
!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!-!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
z36-due-date      DUE-DATE    S z36-recall-date z36-recall-due-date
```

The translation process uses the get\_effective\_due\_date routine: the tab100 variable RECALL-METHOD and the Z36 fields Z36-DUE-DATE, Z36-RECALL-DATE and Z36-RECALL-DUE-DATE are all taken into account in order to generate the effective due date.

## 7. Overdue Notice Schedule

In order to set the overdue notice schedule, edit tab32. Following is an example from the table:

```
! 1  2  3  4  5  6  7  8
!!!!-!!-!!-!!-!!-!!-!!-!!-!!
##### 04 ## 00 003 001 O 0080
##### 04 ## 01 007 007 O 0081
##### 04 ## 02 014 014 O 0082
##### 04 ## 03 021 021 L
##### 04 ## 09 040 028 L
```

Key to Table:

- **Column 1:** Enter a sublibrary code or use ##### to indicate all sublibraries.
- **Column 2:** Enter an item status from tab15 (enter "##" for "all" item statuses).
- **Column 3:** Enter a patron status from tab31 (enter "##" for "all" patron statuses).
- **Column 4:** Current letter number in the loan transaction record z36.
 

00	-	1st	notice
01	-	2nd	notice
02	-	3rd	notice
03	-	4th	notice

 09 - for items which are "claimed returned". This code is used when b-cir-50 (Print Overdue and Lost Billing Notices) is run for "Bills for lost material that was claimed to have been returned"
- **Column 5:** Days overdue (for Notice ID=00) or Days since last letter (for other IDs).

- **Column 6:** Days overdue for requested items (for Notice ID=00) or Days since last letter (for other IDs).
- **Column 7:** Enter O if the item is considered Overdue; enter L for Lost.
- **Column 8:** Transaction number as listed in tab18 (Cash Management). The patron will be charged the fee defined for this transaction number in tab16.

### Reading the Table

The table should be read in the following manner:

```
! 1 2 3 4 5 6 7 8
!!!!-!!-!!-!!-!!-!!-!!-!!-!!
##### 04 ## 00 003 001 O 0080
##### 04 ## 01 007 007 O 0081
##### 04 ## 02 014 014 O 0082
##### 04 ## 03 021 021 L
##### 04 ## 09 040 028 L
```

### Important note:

The overdue days calculation (column 5 or 6) does not include the due date or the last letter date, it starts with the day after.

**For Notice ID=00:** The first notice is sent when the item is three days overdue (or one day overdue if the item has a hold request for it). Three days overdue means that the first notice is sent on the fourth day after the due date.

**For Notice ID=01:** The second notice is sent seven days after the first notice. This means that the system waits until seven days have passed since the first notice, then it sends the second notice on the eighth day.

**For Notice ID=02:** The third notice is sent 14 days after the second notice. This means that the system waits until 14 days have passed since the second notice is sent, then it sends the third notice on the 15th day.

**For Notice ID=03:** The fourth notice is sent 21 days after the third notice, and then the item is declared lost. This means that the system waits until 21 days have passed since the third notice, then it send the fourth notice on the 22nd day.

**For Notice ID-09:** An item that was set as "claimed returned" is declared lost 40 days after it was set as "claimed returned". This means that the system waits until 40 days have passed since the item was set as "claimed returned", then it sends a bill for lost material on the 41st day.

## 7.1. Overdue Notice Letters and Summary

You can determine whether the notices sent to the patron will always use the same template (overdue-letter-0 or overdue-summary-0) or use different templates for each notice, as follows:

- 1st notice: overdue-letter-0-nn or overdue-summary-0-nn
- 2nd notice: overdue-letter-1-nn or overdue-summary-1-nn
- 3rd notice: overdue-letter-2-nn or overdue-summary-2-nn
- 4th notice: overdue-letter-3-nn or overdue-summary-3-nn
- 5th notice: overdue-letter-4-nn or overdue-summary-4-nn

The notices usually become progressively more demanding.

To define which templates will be used, edit the OVERDUE-LETTER-STYLE variable in tab100. If you want the same template to be used for each notice, enter N. If you want different templates to be used, enter Y.

If the loan has been made by a proxy, then a second notice letter is printed for the proxy in addition to the initial notice letter that is printed for the sponsor.

**Overdue Notice (single item per notice)** - filenames: overdue-letter-0, overdue-letter-0-nn, overdue-letter-1-nn, overdue-letter-2-nn, overdue-letter-3-nn, overdue-letter-4-nn. "0" is first notice, "1" is second notice, and so on.

**Overdue Summary** - filenames: overdue-summary-0, overdue-summary-0-nn, overdue-summary-1-nn, overdue-summary-2-nn, overdue-summary-3-nn, overdue-summary-4-nn

## 8. Patron Blocks

Define blocks and their effect on patron privileges. To do so, edit the tab\_delinq.lng table. Following is a sample from the table:

```

! 2 3 4 5 6
! abcdefghi
!!-!-!!!!!!-!!!!!!!!!!-!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!>

00 1 L Patron has no global blocks
01 1 L Patron consistently returns books late
02 1 L Disruptive behavior in library
03 1 L Personal item left in library - contact Circ
desk
04 1 L Too many Claimed Returns
53 1 L Patron to contact academic adviser
!
00 2 ##### L Patron has no local blocks
01 2 ##### N NN L Patron is blocked from placing a hold request.
02 2 ##### NN NN L Patron is not allowed to place hold or
photocopy re
quest.
03 2 ##### N N N L Patron's override permission is blocked.
04 2 ##### N N N L Patron cannot place more than one request on
this i
tem.
```

```
05 2 ##### NNNNNNNNN L All patron's privileges are blocked.
50 2 ##### NNNNN NN L New patron self registration - Web OPAC.
```

Key to Table:

- **Column 1:** Block Code. Enter a code from 01 to 99. You may have up to 99 block codes for global patrons and another 99 block codes for local patrons.
- **Column 2** indicates whether the block code is for a Global Patron (1) (Z303 record) or a Local Patron (2) (Z305 record).
- **Column 3:** Sublibrary. Enter a Sublibrary only if the block code is for "Patrons". You may use the # character as a wildcard.
- **Column 4:** You may limit the patron's privileges if he has been blocked. In order to block a specific privilege, enter *N* in the appropriate column. Otherwise leave it blank. The codes for the privileges are as follows:
  - a - Loan
  - b - Photocopy requests
  - c - Override
  - d - Multiple hold requests
  - e - Check transactions
  - f - Hold request
  - g - Renewal
  - h - Reading room permission
  - i – Booking Request

Each privilege is explained in detail in the online help for the Local Patron Record in the GUI.

- **Column 5** is the code for the character set. It should be set to L, unless you are using CJK.
- **Column 6** is the description of the block as it will appear in the GUI.



## 9. Cash Transactions

### 9.1. Setup of Cash Transactions (tab18.lng)

You can define various transactions for which a patron is charged a fee. To do this, edit tab18.lng.

Two types of transactions can be defined in tab18.lng:

- System-generated Transactions: ID numbers 0000 - 1028
- Librarian-generated Transactions: transactions which are only generated by the librarian, using the New Cash Transaction form (accessible from the Patron Information window / Cash Transactions tab / New button). You can define your own librarian-generated transactions by adding a new line with an unused ID number.

Note that charges for the following letters are dependent on the setting of column 6: ILL material arrival, Hold request filled, Lost material - Notice, Overdue letter and Overdue summary letter. If column 6 has the value **N**, no charges will be levied. This can be used by the library to prevent charging for postal charges when the letter is sent by e-mail.

Following is a sample from the table:

```
1      2      3  4  5      6      7      8  9
!!!!-!!!!-!!-!!-!!-!!!!!!-!!!!!!-!!-
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
0000 ##### ## ## Y      10.00      General
0001 ##### ## ## Y 1.00      Photocopy request
0002 ##### ## ## Y 10.00     12.00     Hold request
0003 ##### ## ## Y      Late return
0040 ##### ## ## Z      Lost material - Handling
```

Key to Table:

- **Column 1:** ID number of the transaction.
- **Column 2:** Sublibrary. For "all sublibraries," use #####. (Be sure to define a catch-all line that has ##### in column 2 together with ## in column 3.)
- **Column 3:** Item status. For "all items", use ##.
- **Column 4:** Patron status. For "all patrons", use ##. (Be sure to define a catch-all line that has ##### in column 2 together with ## in column 3.)
- **Column 5:** Switch to activate/deactivate cash control. If you enter *Y*, patrons will be charged for the transaction according to the fee entered in column 5, if the setup of column 6 does not prevent this. If you enter

*N*, patrons will not be charged for the transaction. Very similar to *Y*, the *Z* parameter also charges for cash transactions, but only when the cash rate does not equal zero. Note that the *Z* parameter affects only new transactions.

Note: If column 5 is set to *Y* for Late Return fines, the rate will be determined according to the fine rate entered in column 11 of tab16, and column 5 will be ignored. See the Late Return line in the example above. The same applies to lost material charges that are calculated according to tab34.

- **Column 6:** Fine. Enter the amount in your currency that you want to charge the patron.

Note: If column 4 is set to *Y* for Late Return fines, the rate will be determined according to the fine rate entered in column 11 of tab16, and column 5 will be ignored (see the Late Return line in the example above). The same happens with lost material charges that are calculated according to tab34. If tab34 is not present or if there is no value in tab34, the sum is taken from tab16.lng.

In some lines, the value in column 5 functions as a ratio multiplier. The actual amount is set in other tables. This applies to the following lines:

- 0003,0014 - late return fee, dependent on tab16
- 0012,0040,0041,0042 - lost material, dependent on tab34
- 0015 - ILL material arrival, dependent on tab\_ill\_charge
- 0050,0051 - ratio, additional daily amount or a combination of both charged for late return of recalled / rush-recalled loan. The tab100 variable OVERDUE-RECALL-RATIO defines whether the number is a ratio, a set amount or a combination of both.
- 0052,0053 - ratio, additional daily amount or a combination of both for a fine limit for late return of recalled/rush-recalled loan. The tab100 variable OVERDUE-RECALL-RATIO defines whether the number is a ratio, a set amount or a combination of both.
- 0054,0055 - ratio, additional daily amount or a combination of both for a lost letter for recalled/rush-recalled loan. The tab100 variable OVERDUE-RECALL-RATIO defines whether the number is a ratio, a set amount or a combination of both.

- **Column 7** is the rate of the VAT that will be added to the sum that is set in column 5.

For example, if a transaction has the number 10.00 in column 5 and 15.00 in column 6, the net sum will be 10.00, the VAT sum will be 1.50 (15 percent of 10) and the sum of the transaction will be 11.50.

If the column is left empty, no VAT is assumed and the net value of the transaction will equal the total sum.

Note that transactions which are calculated based on tab16 (such as 0003) or tab34 (such as 0040-0042) also have their VAT rates set in this table.

- **Column 8** is a switch for charging/not charging if the patron's valid address contains an e-mail address. This is used for preventing the levying of postal charges if the letter is sent by e-mail.
- **Column 9** is the name of the cash transaction as it will appear in the GUI.

### Y/N Ratio

For some lines the value is Y or N (meaning that the system should or should not register a cash transaction), or a ratio. The actual amount is set in other tables. This is so for:

- 0003, 0014 - late return fee, dependent on tab16
- 0040, 0041, 0042, 0054, 0055 - lost material, dependent on tab34
- 0015 - ILL material arrival, dependent on `tab_ill_charge`
- 0050, 0051 - ratio for late return of recalled loan

### Alphanumeric Paper Formats

There are some lines, A4-6, A3-6, B2-6, LE-6 where the ID number of the transaction (Column 1) is not purely numeric. These are used to register photocopy requests for specific paper formats.

You can add other paper formats according to your needs and add an appropriate line. For example, when LE-6 was added for 8 1/2"x11" Letter paper formats to be processed, a new line was added to tab 18:

```
LE-6 #####  ##  Y 0.20          L Photocopy processing (Letter)
```

The ID 0006 will be used as a default if the special entries are missing.

## 9.2. Registration of Cash Transactions in Offline Circulation

Whether or not offline circulation registers cash transactions depends on the variable OFFLINE-CASH-TRANS in tab100. Set to Y for the system to register cash

transactions in offline circulation; set to N for the system not to register cash transactions in offline circulation.

## 10. Circulation Transaction Checks (tab\_check\_circ)

tab\_check\_circ sets the checks that will be performed when an item is loaned or renewed.

```
1          2
!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!>
LOAN-GBL   check_circ_1_a
LOAN-GBL   check_circ_1_d
LOAN-GBL   check_circ_9_a                               tab_block_circ_alternative
RENEW-GBL  check_circ_1_a
RENEW-GBL  check_circ_1_b
RENEW-GBL  check_circ_1_c
RENEW-GBL  check_circ_1_e
RENEW-GBL  check_circ_9_a
```

Column 1 defines when a check is performed:

1. **B-CIR-77** - Update patron records (p\_cir\_77)
2. **LOAN-GBL** - checks patron prior to loan and when "Check" is performed on the Global Patron Information window
3. **RR-LOAN** - item is being loaned at a reading room station (type 4 in tab\_attr\_sub\_library). Intended for checking the patron using the original sublibrary of the item to find the z305 patron record. Used with check\_circ\_2\_d.
4. **LOAN** - item is being loaned to a patron
5. **RENEW** - item is being renewed to a patron applies to Renew and Renew all functionality
6. **RENEW-WWW** - patron renewing loan in www
7. **RENEW-GBL** - checks on patron after the **Renew All** (for renewing all loans) or the **Renew Marked** (for renewing more than one selected loan at a time) buttons from the Circulation GUI's Loan List have been clicked.
8. **B-CIR-10** - item renewed to a patron (p\_cir\_10)
9. **B-CIR-08** - item renewed to a patron (p\_cir\_08)
10. **ROUT-LOAN** - item is being loaned to a routing member
11. **EXTEND** - due date/hour is being changed from the List of Loans or during a loaning activity

Column 2 defines which check procedure will be performed: The available checks are:

Check	Procedure	Action	\$aleph_root/error_lng/ check_circ
1_a	patron blocks Z303	Checks patron blocks on Z303 record	0101, 0102
1_b	patron blocks Z305	Checks patron blocks on Z305 record	0111, 0112, 0113, 0115
1_c_a	patron expiration date + renew warning	Checks z305_expiry_date Renew warning if the expiration date has already passed	0121
1_c_b	patron expiration date + renew warning	Checks z305_expiry_date Renew warning for approaching expiration date according to parameters set in col.3 tab30	0122
1_d	overdue check	Works according to the variable OVERDUE- LETTER-NO which determines when an item is "overdue" (i.e., the due date has passed and N (0/1/2/3/4) notices have been sent)	0131
1_e	block date check	checks z305_end_block_date	0141
1_f	proxy's expiration date check	checks z305_expiry_date	0261
2_a	patron loan permission	checks z305_loan_permission	0151
2_b	patron renew permission	checks z305_renew_permission	0152
2_c	patron reading room permission	checks z305_rr_permission, taking the z305 that matches the reading room sublibrary at which the loan is being performed sublibrary (i.e. when item is loaned at a reading room station, type 4 in tab_attr_sub_library)	0153
2_d	loan and reading room permission	check patron loan and reading room permission using the z305 that matches the original sublibrary of the item (i.e. the sublibrary of the item before it was assigned the RR sublibrary)	0154

Check	Procedure	Action	\$aleph_root/error_lng/ check_circ
2_e	Handling magnetic media	Checks if a patron tries to loan/renew/return a magnetic media (tab25.lng, col. 4 = Y).	155
3	patron renew limit	check the patron's renew limits according to parameters set in tab16 (col.21)	0161, 0162
4_a	patron loan limits	check the patron's loan limits according to parameters set in tab16 (col.12)	0171, 0172
4_b	patron loan limits (99 line)	check the patron's overall loan limit in a sublibrary according to parameters set in tab16 99 line	0181
4_c	patron loan limits (99 line)	check the patron's overall total loan limits for ADM library according to parameters set in tab16 99 line	0182
4_d	patron loan limits (98 line)	check the patron's overall total loan limits for the sublibrary's group according to parameters set in the tab16 98 line. The entire group (all libraries that share a column 7 of tab_sub_library value) may not exceed the number of loans set up in the 98 line	0183
5	cash limit	<p>checks if the patron has exceeded the amount allowed in z305_cash_limit (including open and transferred cash transactions)</p> <p>This check retrieves list of charges to include/exclude.</p> <p>For example:  <b>CHARGES=-0001,0006,0008,0009</b>  This means that all charges except for 0001,0006,0008,0009 are counted.</p> <p><b>CHARGES=+0001,0006,0008,0009</b>  This means that only 0001,0006,0008,0009 charges are counted.</p> <p>If the CHARGES parameter is not retrieved, all cash charges are taken into account.</p>	0191

Check	Procedure	Action	\$aleph_root/error_lng/ check_circ
5_b	cash limit	<p>checks if the patron has exceeded the amount allowed in z305_cash_limit (including open cash transactions only)</p> <p>This check retrieves a list of charges to include/exclude.</p> <p>For example:            CHARGES=-0001,0006,0008,0009            This means that all charges except for 0001,0006,0008,0009 are counted.</p> <p>CHARGES+=0001,0006,0008,0009            This means that only 0001,0006,0008,0009 charges are counted.</p> <p>If the CHARGES parameter is not retrieved, all cash charges are taken into account.</p>	0191
6	item requests	checks whether the item has hold requests placed on it	0201
6_a	item requests	checks whether the item has hold requests placed on it	0201
6_b	Item hold queue	Checks whether the loaning patron is the first in the hold queue.	202
7_a	item loan permission	checks whether the item can be loaned, column 6 in tab15.lng	0211, 0212
7_b	item renew permission	checks whether a loan on this item can be renewed, column 7 in tab15.lng	0211, 0213
7_c	reloaning limit	checks whether the same patron did not return the exact item recently, as per column 15 in tab15.lng	0214
8_a	item - lost/claimed return	checks if the item was declared as lost or claimed to have been returned	0221, 0222
8_b	renew - overdue letter	checks if an overdue letter has been printed for a loaned item	0231

Check	Procedure	Action	\$Saleph_root/error_lng/ check_circ
9_a	overdues and fines - ADM library	<p>checks maximum overdues, recalled overdues and fines, for ADM library based on tab_block_circ or any other table defined in column 3 of tab_check_circ</p> <p>This check retrieves two parameters:</p> <ul style="list-style-type: none"> <li>• block circ table name. If not specified, the default table, tab_block_circ, is consulted.</li> <li>• list of charges to include/exclude</li> </ul> <p>For example:  <b>CHARGES=-0001,0006,0008,0009</b>  This means that all charges except for 0001,0006,0008,0009 are counted.</p> <p><b>CHARGES=+0001,0006,0008,0009</b>  This means that only 0001,0006,0008,0009 charges are counted.</p> <p>If the CHARGES parameter is not retrieved, all cash charges are taken into account.</p> <p>The two parameters should be separated by a semicolon (;).  For example:  tab_block_test;CHARGES=+0001,0006,0008,0009</p>	0241, 0242 0243
9_b	overdues and fines - sublibrary	checks maximum overdues and recalled overdues in a sublibrary based on tab_block_circ or any other table defined in column 3 of tab_check_circ	0251, 0252



Check	Procedure	Action	\$aleph_root/error_lng/ check_circ
10_a	overdues and fines - ADM library	<p>checks maximum overdues, recalled overdues, and fines, for regular, lost, and claimed returned loans, for ADM library based on tab_block_circ or any other table defined in column 3 of tab_check_circ</p> <p>This check retrieves two parameters:</p> <ul style="list-style-type: none"> <li>• block circ table name. If not specified, the default table, tab_block_circ, is consulted.</li> <li>• list of charges to include/exclude.</li> </ul> <p>For example: CHARGES=-0001,0006,0008,0009 This means that all charges except for 0001,0006,0008,0009 are counted.</p> <p>CHARGES=+0001,0006,0008,0009 This means that only 0001,0006,0008,0009 charges are counted.</p> <p>If the CHARGES parameter is not retrieved, all cash charges are taken into account.</p> <p>The two parameters should be separated by a semicolon (;). For example: tab_block_test;CHARGES=+0001,0006,0008,0009</p>	0241, 0242 0243
10_b	overdues and fines - sublibrary	checks maximum overdues and recalled overdues, for regular, lost and claimed returned loans in a sublibrary based on tab_block_circ or any other table defined in column 3 of tab_check_circ	0251, 0252
12_a	ILL patron identity	checks if there is a match between the original ILL patron and the patron who is trying to loan the ILL item	0801
13_a	Renew ILL item	Checks if the renewed items are ILL items (items that have been created as a result of receiving borrowing request from supplier). If so, the renew action is enabled via Circ-Loans List only for authorized ILL staff user. If this check is not defined, then ILL items will be renewed like any other item.	803
14_a	Check loan of like item.	Checks whether the patron that is making the loan already has a like item on loan.	291

Check	Procedure	Action	\$aleph_root/error_lng/ check_circ
14_b	Check loan of similar item.	<p>Checks if the patron making the loan already has a similar item on loan. Similar items are items that has the same enumeration/chronology and are of the same material type. Items in all sublibraries, collections, and statuses are considered similar.</p> <p>This check is the same as 14_a, only the definitions for Like Copy in tab100 (SUB-LIBRARY-DIVISION, HOLD-REQUEST-ITM-STATUS, HOLDREQ-PROCESS-STATUS, and HOLD-REQUEST-COLLECTION) are not taken into account.</p>	292

The text of messages associated with the checks is defined in \$aleph\_root/error\_lng/check\_circ. The minimum circulation user level to override them is defined in the check\_circ\_override table in the ADM library.

Alternative blocks are useful when you need to define a separate set of blocks for different activities. They can be set for any of the activities defined in Column 1. Alternative blocks are defined in a user-defined alternative table, or in the default alternative table tab\_block\_circ.

Column 3 defines the parameters for the check routine

- The alternative table that is consulted for checks 9\_a, 9\_b, 10\_a, and 10\_b. This alternative table must be present in the data tab of the ADM library. If not specified, the default table tab\_block\_circ is used.
- The list of cash charges to include/exclude for checks 5, 5\_b9\_a, 9\_b, and 10\_a. If the CHARGES parameter is not retrieved, all cash charges are taken into account.

## 11. Hold and Photocopy Requests

In order to set the management policy for hold and photocopy requests, you must make decisions regarding such factors as which checks the system will perform before/after a request is made; which pickup/delivery location will be used for each combination of sublibrary, item status and patron status; the amount of time an item may be kept on the hold shelf; the approach that will be used for printing call slips; and so on. Each factor is discussed below.

### 11.1. Hold Request Checks

It is up to you to determine which checks the system will perform before/after a hold request is placed. For example, the system may check whether or not the item can be requested at all or may check whether or not the item is on loan, in which case it will display information on its status (lost/recalled/on loan until). To set up the checks, edit tab\_hold\_request in the ADM library's tab directory.

```

! 1                                2
!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
PRE      check_hold_request_a
PRE      check_hold_request_b
PRE      check_hold_request_c

POST     check_hold_request_d
POST     check_hold_request_e
POST     check_hold_request_f

CIRC     check_hold_request_f
CIRC     check_hold_request_g
CIRC     check_hold_request_h

INFO     check_hold_request_k

```

This table defines checks for hold requests. The checks can influence:

- Display (or not) of the Request link on the list of items
- Display of information regarding the group of items and the patron's place in the request queue
- Display of meaningful messages concerning the reason why a request is refused.

The following separate instances have been defined when checks are made:

- AB-POST is used when submitting an advance booking request from the OPAC or from the GUI
- AB-PRE is used when the list of items is displayed in the Web OPAC. Passing this check is required to show the 'request' link next to advance booking items
- BK-CIRC is used in the Circulation client
- BK-POST is used when the booking request fill-in form is displayed
- BK-PRE is used for the 'Booking' link when the list of items is displayed in the Web OPAC
- CIRC is used in the Circulation client
- CIRC-INFO is used in the Circulation client. The errors reported by this instance can always be overridden
- FWD-TITLE is used when the active stop in a title request is changed. Queue stops whose items do not pass FWD-TITLE checks will be considered not available.
- HL-GRP is used for title level hold requests ('BIB Request'). Only items that pass the check are regarded as available.
- HL-GRP-PRE is used for title level hold requests ('BIB Request'). This check is performed on each ADM that has items that are related to the selected BIB record. If the ADM does not pass the check, its items will not be included in a group.
- INFO is used when the hold request fill-in form is displayed

- POST is used when a request is sent to the server
- PRE is used when the list of items is displayed in the Web OPAC
- REALLOC-AB is used when an advance booking request is reallocated to another like item
- REALLOC-BK is used when a booking request is reallocated to another like item
- TITLE-REQ is used for title level
- XML-CIRC is used when a hold request is created from an X-Service
- UE06-PREF and UE06-LIKE are used by the ue\_06 request handling daemon. They are relevant only when the preferred items mechanism is applied and are used in order to define whether a preferred item is available or not.

UE06-LIKE is used when a like item of the original requested item is checked.  
 UE06-PREF is used when an item that is not a like item is checked.

Check routines that check hold request limits (for example, check\_hold\_request\_h) should be defined only in UE06-PREF and not in UE06-LIKE.

If a check that requires patron information is used as a PRE check, then the patron must first be identified, and you must set check\_hold\_request\_1 as a PRE check as well.

When setting which checks to use, take into account the system resources required for checks that are made when the items list is displayed (PRE checks). If the checks require comparing item records and existing requests, and there are many item records, this can create an undesirable load on the server. If a check is listed for PRE, it need not be listed for INFO or POST, since the INFO/POST scenario will not happen. Checks that relate to the patron usually appear in POST.

Check	Action	\$aleph_root/error_lng/ check_hold_request	Suggested use
a	if tab15 col.8=N, item cannot be requested	1100	PRE,POST, CIRC
b	if sublibrary and item status are not listed in tab37, item cannot be requested.	1105	PRE,POST, CIRC
c	if tab15 col.12=Y, the item can have only one request	1120	PRE,POST, CIRC
d	z305 hold-permission	1110	PRE,POST, CIRC
d1	checks if the item is unavailable (requested or loaned to any patron)	1185	PRE, POST, CIRC
e	if combination of sublibrary, item status and patron status are not listed in tab37, item cannot be requested	1115	POST, CIRC
f	z305 multi-hold allowed	1125	POST, CIRC

Check	Action	\$aleph_root/error_lng/ check_hold_request	Suggested use
g	z305 hold-on-shelf (item availability)	1130	POST, CIRC
h	tab16 col.13, maximum number of hold requests	1135	POST, CIRC
h_1	tab16 col.13, maximum number of hold requests  This routine is similar to check_hold_request_h, but also includes in the check existing loans that were originally hold requests.	1135	POST, CIRC
h_2	checks if the maximum number of hold requests has been reached. The maximum number is received as a parameter.	1350	POST, CIRC
i	if the item is on loan, displays due date, due date that will be active after recall action is performed, and information on whether lost or recalled	6000-6002,6020	INFO
j	if item has requests, displays on hold, patron's place in queue	6005-6006	INFO
k	tab15 col.8 value (Y,N,C)	6010-6012	INFO
k1	Z30-description value	6016	INFO
l	patron-id has not been entered	1140	PRE
m	patron has item on loan and is attempting to request a like copy	1150	POST, CIRC
n	patron tries to reserve an item that has been declared as "Lost" or "Claimed Returned."	1095	POST, CIRC
o	checks if there is a "like" copy available (same year,volume, part, issue AND depending on tab100 setup, same sublibrary, collection, status, and process status).	1150	INFO
p	checks if all "like" copies are on loan (not available) and informs the patron that the request cannot be placed, that he must apply to the circ desk. This check should be used by a library that wants library staff to decide which copy should be requested (because recall is made for the copy requested, and not all copies)	1155	POST, CIRC
q	tab16 col.13 check for maximum number of hold requests for the sublibrary ("99" line)	1160	POST, CIRC
q_1	tab16 col. 13 check for maximum number of hold requests for the sublibrary (line 99)  This routine is similar to check_hold_request_q, but also includes in the check existing loans that were originally hold requests.	1160	POST, CIRC
r	patron expiration date has been reached	1165	POST, CIRC

Check	Action	\$aleph_root/error_lng/ check_hold_request	Suggested use
s	patron has exactly the same item on loan	1170	POST, CIRC
t	check for maximum number of hold requests for the ADM library (ADM line(s) in tab16).	1175	POST, CIRC
t_1	Check for maximum number of hold requests for the ADM library (ADM line(s) in tab 16) This routine is similar to check_hold_request_t, but also includes in the check existing loans that were originally hold requests.	1175	POST, CIRC
u	reading room permission	1176	POST, INFO, CIRC
v	If an item belongs to a remote storage facility and is available, the expected delivery time is calculated (using tab17 and tab24). The message displays in INFO in place of the <i>Your place in queue</i> message.	6003	INFO
w	Items that are currently loaned to a specific patron status or that have a specific item status cannot be requested. The patron and item status that are checked in combination are defined in col. 3. For example: BOR=02,08;ITEM=03	6004	PRE,POST,CIRC
x	Check for maximum number of hold requests for the sublibrary's group ("98" line)	1161	POST, CIRC
x_1	Check for maximum number of hold requests for the sublibrary's group (line 98) This routine is similar to check_hold_request_x, but also includes in the check existing loans that were originally hold requests.	1161	POST, CIRC
y	Patron with a specific status cannot request specific items (by item status and process status). Set up using parameters in column 3, for example: BOR=03,06;ITEM=03;PROC=MI,NA	6030	POST, CIRC
z	The hold request being submitted will not be first in the queue. This is mainly intended for the requests that require recalling, so that an indication is made that although a recall will be made, the requesting patron will not be the first to receive the item.	1177	CIRC-INFO
sh	Applies to tab_service_hour. Checks the request submission time (day+hour) against the pickup location service hours. The request is allowed only within the service hour's timeframe.	1235	POST, CIRC, XML-CIRC

Check	Action	\$aleph_root/error_lng/ check_hold_request	Suggested use
1_a	Checks patron global blocks. Error message include block codes and description from tab_delinq.lng table.	6041	PRE, POST, CIRC
1_b	Checks patron local blocks. Error message include block codes and description from tab/tab_delinq.lng table	6051	PRE, POST, CIRC
1_d	Checks if patron has overdue loans. A loan is considered overdue if the due date has passed and "n" or more notices have been sent, as defined in the library's tab/tab100 OVERDUE-LETTER-NO.	6070	PRE, POST, CIRC
1_e	checks patron block date	6060	PRE, POST, CIRC
4_a	checks if patron has exceeded the loan limit for the item status (tab16 column 12)	6111	PRE, POST, CIRC
4_b	checks if patron has exceeded the loan limit for the sub library (tab16 column 12)	6120	PRE, POST, CIRC
4_c	checks if patron has exceeded the loan limit for the ADM library (tab16 column 12)	6130	PRE, POST, CIRC
4_d	checks if patron has exceeded the loan limit for the sub library group (tab16 column 12)	6140	PRE, POST, CIRC
5	<p>checks is the patron has exceeded the cash limit allowed in z305_cash_limit - uses O(open) and T(ransferred) transactions.</p> <p>This check retrieves list of charges to include/exclude.</p> <p>For example:            CHARGES=-0001,0006,0008,0009            This means that all charges except of 0001,0006,0008,0009 will be counted.</p> <p>CHARGES=+0001,0006,0008,0009            This means that only 0001,0006,0008,0009 charges are counted.</p>	6100	PRE, POST, CIRC

Check	Action	\$aleph_root/error_lng/ check_hold_request	Suggested use
5_b	<p>Checks if the patron has exceeded the cash limit allowed. But only for O(pen) transactions.</p> <p>This check retrieves a list of charges to include/exclude.</p> <p>For example: CHARGES=-0001,0006,0008,0009 This means that all charges except of 0001,0006,0008,0009 are counted.</p> <p>CHARGES=+0001,0006,0008,0009 This means that only 0001,0006,0008,0009 charges are counted.</p>	6100	PRE, POST, CIRC
9_a	<p>Checks the limits defined in tab/tab_block_circ (Maximum number of overdue loans, Maximum number of recalled overdue loans, Maximum cash owing).</p> <p>This check retrieves two parameters:</p> <ul style="list-style-type: none"> <li>• block circ table name. If not specified, the default table tab_block_circ is consulted.</li> <li>• list of charges to include/exclude</li> </ul> <p>For example: CHARGES=-0001,0006,0008,0009 This means that all charges except for 0001,0006,0008,0009 are counted.</p> <p>CHARGES=+0001,0006,0008,0009 This means that only 0001,0006,0008,0009 charges are counted.</p> <p>If the CHARGES parameter is not retrieved, all cash charges are taken into account.</p> <p>The two parameters should be separated by a semicolon (;). For example: tab_block_test;CHARGES=+0001,0006,0008,0009</p>	6081	PRE, POST, CIRC
9_b	<p>Checks the limits defined in tab/tab_block_circ as 9_a but at item sub library level.</p> <p>This check retrieves the block circ table name. If not specified, the default table tab_block_circ is consulted.</p>	6091	PRE, POST, CIRC



Check	Action	\$aleph_root/error_lng/ check_hold_request	Suggested use
10_a	<p>As 9_a but counts all types of loans, i.e. active loans and claimed return.</p> <p>This check retrieves two parameters:</p> <ul style="list-style-type: none"> <li>• block circ table name. If not specified, the default table tab_block_circ is consulted.</li> <li>• list of charges to include/exclude</li> </ul> <p>For example: CHARGES=-0001,0006,0008,0009 Means that all charges except for 0001,0006,0008,0009 are counted.</p> <p>CHARGES=+0001,0006,0008,0009 This means that only 0001,0006,0008,0009 charges are counted.</p> <p>If the CHARGES parameter is not retrieved, all cash charges are taken into account.</p> <p>The two parameters should be separated by a semicolon (;). For example: tab_block_test;CHARGES=+0001,0006,0008,0009</p>	6081	PRE, POST, CIRC
10_b	<p>As 9_b but counts all types of loans, i.e. active loans and claimed return.</p> <p>This check retrieves the block circ table name. If not specified, the default table tab_block_circ is consulted.</p>	6091	PRE, POST, CIRC

Note that only like copies that are available according to column 8 of tab15 are considered available like copies.

### TAB\_PHOTO\_REQUEST

tab\_photo\_request is used to define which checks should be performed by the system when a photocopy request is placed. It is similar in functionality to tab\_hold\_request. In some cases, the checks on the photocopy requests for the Web OPAC determine whether the "Photo" link appears on the item line.

## 11.2. Priority

The position of the Hold Request in the queue is determined by assigning a Priority. The highest level priority is "00", the lowest is "99". You can set the default Priority for the GUI Circulation module and Web OPAC by editing tab31, column 19. The priority is dependent on the sublibrary of the requested item and on the patron's status.

### 11.3. Pickup/Delivery Locations

For each combination of sublibrary, item status and patron status, you may define the location from which the patron may pick up an item or photocopy being held for him, and the location to which the item or photocopy will be delivered. To do so, edit `tab37` (for hold requests) and `tab38` (for photocopy requests). When a pickup location is not defined, it is not possible to place the request.

When creating a Hold or Photocopy Request (WWW, Circ, OPAC), the default pickup sublibrary is the patron's home library. If the `Z303-HOME-LIBRARY` is not set up as a valid pickup library for the item in `tab37` (for holds) or `tab38` (for photocopies), the item's `Z30-SUB-LIBRARY` or the first sublibrary in `tab37` is used as the default instead. This depends on the setup of the `PICKUP-SORT-BY-ITEM` `tab100` variable.

### 11.4. Request Service Hours Checks (`tab_service_hour`)

The hold and photocopy request submission time (day+hour) can be checked against the pickup location service hours. The pickup location service hours are set in the `./xxx50/tab/tab_service_hour` table. For table structure and more information, see [tab\\_service\\_hour](#) on page 109.

The service hour check is performed after the request form is filled and submitted by the user. If a request is not submitted during the pickup location service hours, the request is not accepted and the following message is displayed: "Pickup location is currently out of service. Request cannot be submitted" (message 1235).

The system checks the service hour (`tab_service_hour`) only when `check_hold_request_sh` and `check_photo_request_sh` check routines are set in `tab_hold_request` and `tab_photo_request` respectively.

To configure the pickup location service hour check for hold requests, set the following in `./xxx50/tab/tab_hold_request`:

```
! 1 2
!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
POST      check_hold_request_sh
CIRC      check_hold_request_sh
XML-CIRC  check_hold_request_sh
```

**Note:** For hold requests, the only relevant instances for the service hour check are POST, CIRC, and XML-CIRC.

To configure the pickup location service hour check for photocopy requests, set the following in `./xxx50/tab/tab_photo_request`:

```
! 1 2
!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
POST      check_photo_request_sh
CIRC      check_photo_request_sh
```

**Note:** For photocopy requests, the only relevant instances for the service hour check are POST and CIRC.

## 11.5. Hold Shelf

You may define different limits on the amount of time that an item is kept on the hold shelf, depending on whether the hold is triggered by the return of the item, or triggered by the Patron Request utility "Print Letter - Hold Request Filled". Many libraries use the utility for closed stack management and want a shorter hold period for items in closed stacks than for other items.

To define the different limits, edit `tab44`.

Note that the amount of time that the item is kept on the hold shelf is configured in `tab44` depending on the pickup location. Also note that the amount of time that is defined in `tab44` is net time, not counting the pickup location's closing days.

## 11.6. Printing Call Slips

The System Librarian is responsible for determining the approach that will be taken for printing call slips.

## 11.7. Item Holds List

The sort order on the Item Holds List is defined in `pc_server_defaults` with the following parameters:

```
setenv circ_user_z37_sort_routine      01
setenv circ_user_z37_sort_order       A
```

00 - "standard" sort using priority, request date, open date & hour

01 - sort using sublib, item-status, collection, open date & hour

02 - sort using sublib, item-status, collection, status, open date & hour

04 - sort using group ID and sequence, priority, request interest date and request date

A for ascending; D for descending.

06 – sort using sublib, pickup location, open date and requester name.

A for ascending; D for descending.

## 11.8. Loans List

The sort order on the Loans List is defined in `pc_server_defaults` with the following parameters:

00 - "standard" sort using due-date

01 - sort using sublib, item-status, collection, due-date

A for ascending; D for descending.

If the standard sort is sufficient, then these lines can be commented out.

## 11.9. Hold Request Log

The system librarian can decide which of the following hold request related events are recorded in the circulation log:

- Hold request created
- Hold request created (OPAC)
- Hold request deleted
- Hold request deleted (OPAC)
- Hold request placed on shelf
- Hold request filled letter printed
- Hold request not filled letter printed
- Hold request picked up

In order to create the circulation log, configure these events in <ADM library>/tab/tab\_circ\_log.lng (events 70-77).

## 11.10. photo\_request\_style

The System Librarian can decide whether or not to delete the request after the slip is printed. This is done by defining the `tab100` variable:

```
PHOTO-REQUEST-STYLE
```

If the variable is left blank, then when the Print Photocopy Request Slips (cir-22) service is run the system will print Photocopy Request slips and the requests will not be deleted. When the librarian enters the Circulation module to print a letter to the patron telling him to come and pick up the requested material, another slip will be printed for placing in the material, and only then the request will be deleted.

If the slip is printed by `ue_06` or by `cir_22`, the request is not deleted but its status is changed to H.

If the variable is set to H, then when the Print Photocopy Request Slips (cir-22) service is run the system will print "Photocopy request filled" letters to the patrons in addition to the slips. The requests will be deleted and will no longer be available in the Circulation module.

## 11.11.KEEP-FILLED-PHOTO

The System Librarian can decide whether or not to keep photocopy requests after they have been filled. This is done by defining the `tab100` variable:

```
KEEP-FILLED-PHOTO
```



## Defining The Patron

The patron is allowed to place a Rush Cataloging request if the Local Patron Privileges have been set to ‘Y’:

The screenshot shows a web-based configuration interface for 'Local Patron Privileges'. It contains several rows of radio button options. The 'Rush Cataloging Request' option is circled in red, and its 'Yes' radio button is selected. Other options include 'Loan', 'Renewal', 'Hold Request', 'Multiple Hold Requests', 'Photocopy Request', 'Check Transactions', 'Override Privileges', 'Late Return Ignored', 'Allow Hold on Available Item', and 'Reading Room Permission'. On the right side, there are buttons for 'Update', 'Get Defaults', and 'Cancel'.

Column 23 of tab31 sets the default for this privilege:

```
!                1 1 1 1                1 1 1 1 2 2 2 2
! 1    2 3 4 5 6 7 8 9 0 1 2 3    14        15        6 7 8 9 0 1 2 3
!!!! !-!- !- !- !-!- !- !- !-!- !- !- !-!- !-!- !-!- !-!- !- !- !- !- !
WID  02 Y Y Y N Y Y Y N F + M 00000006 9999999999 N Y Y 21 Y N Y N
```

## The Rush Cataloging Request Department

The Rush Cataloging department is set by the tab\_sublibrary\_grouping table. This table, defined in the data\_tab directory of the ADM library, sets a group code for each sublibrary. The trigger department is the group code that is defined in column 2 of this table for the requested item’s sublibrary (in column 1). Note that the sublibrary code is used if no group code is defined for the sublibrary.

## **11.16. Requesting Unbarcoded Items**

It is possible to allow patrons to perform circulation activities on items that were not yet cataloged (“unbarcoded items”):

The bibliographic records for these items have at least one item record attached. This item record has an item status which denotes it as being a “multi” part item that is, this item record denotes that there are multiple items available for this bib record. Note that this item does not represent a real item, but is used to indicate the existence of unbarcoded items related to this bibliographic record.

When requesting such item, a new temporary item record is created in the system.

### Defining the ‘multi part’ item

An item is a multi part item if it is set to “U” in column 8 of the relevant tab15.lng.

```
! 1  2 3 4      5                6 7 8 9  1 1 1 1 1 1 1 1
!                0 1 2 3 4 5 6 7
```

!!!!-!!-!!-!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-!!-!!-!!-!!-!!-!!-!!-!!-!!  
WID ## MP L Multi part Y N U Y Y N N N N 00 N A

### The temporary item record

In general, the temporary item record will be created with the same information as the original ‘multi-part’ item (shelfmark, sublibrary, collection, process status, remote storage ID etc.). Specific fields are built as following:

- The item status of the temporary item record will always be “Temporary Unbarcoded” - item status 88 will be used.
- The barcode will be assigned according to a new counter: “last-barcode-tmp-num”.
- The z30\_description is built from the following request fields and in the following order:
  - Author (z37\_author)
  - Title (z37\_title)
  - Pages (z37\_pages)
  - Note 1 (z37\_note\_1)
  - Note 2 (z37\_note\_2)

Information from the above fields is appended with commas between the values. Since the z30\_description field is limited to 200 bytes, if the appended information is more than 200 bytes, it will be truncated.

The temporary item record is used to fill the request, and is loaned to the patron etc, i.e. would work as all other z30 item records.

After returned to the library, the temporary item record is deleted but is kept in the system. It is possible to use this temporary item record, give it a proper barcode and item status, and use it as a permanent item.

## **11.17. Requests Refusal**

The library can decide to refuse a hold or a photocopy request. This is done via the Requests menu in the Circulation module – print letter refusal. This option enables the printing of a refusal letter, including the refusal reason. The request is moved to the History log with Refused status. A Circulation Logger record (Z309) is created that includes the refusal reason.

To enable the refusal flow, the following steps should be applied by the System Librarian:

1. Add the request refusal option to the requests menu by adding the following lines to GUI config under Circ/Tab/Lng/menu.dat:

REFUSE_HOLD_BARCODE	Print Letter - Hold Request &Refused
REFUSE_PHOTO	Print Letter - Photocopy Request &Refused
REFUSE_BOOKING	Print Letter - Booking Request &Refused

2. Define the following refusal forms in ./<Bib Lib>/form\_lng:

- hold-refused-letter-s.xml
  - photocopy-refused-letter-s.xml
  - booking-refused-letter-s.xml
3. Add the following lines to ./<Adm Lib>/tab/tab\_circ\_log.lng, r to allow log event creation on refusal:

```
64 Y Y LRefusal Hold Request note
65 Y Y LRefusal Photocopy Request note
66 Y Y LRefusal Booking Request note
```

## 11.18. Request Fulfillment by Preferred Items

The ue\_06 request handling daemon prints slips for hold and photocopy requests. These slips include information about the item that is used to fulfill the request. Sometimes a library wants to define the preference order in which materials are used. For example, a library that keeps copies and originals wants to use the copies first, and use the original only when no other material is available. This is in order to avoid deterioration of the original materials.

In order to enable the usage of preferred items, apply the following:

1. Define the preference order of the items.
2. Define the relevant pickup locations for which the preferred item mechanisms are applied.
3. Define the check routines for checking whether the preferred item is available.

### 11.18.1. Defining the Preference Order of Materials

tab\_req\_preferred in the ADM library's tab directory is used to define which items are preferred and their priority when ue\_06 is handling hold and photocopy requests.

#### Note:

Only preferred items should be listed in this table. There is no need to list all possible items here. If the tab\_req\_preferred table does not exist or is empty, the preferred item mechanism is not applied

#### Table Structure

- **Column 1: request type**  
Size: 1  
Possible values:
  - H-Hold Request
  - P-Photocopy request
  - # - Hold request and Photocopy request
- **Column 2: sublibrary**  
Size: 5  
Possible values:
  - Sublibrary code
  - # - any sublibrary



- **Column 3: item status**  
Size: 2  
Possible values:
  - item status code
  - # - any item status
- **Column 4: item process status**  
Size: 2  
Possible values:
  - Item process status code
  - # - any item process status
- **Column 5: item collection**  
Size: 5  
Possible values:
  - Item collection code
  - # - any item collection

### **Table Example**

!	2	3	4	5
!-!!!!-!!!-!!!-!!!!				
#	LAW	01	##	GEN
#	LAW	01	##	NBS
#	LAW	##	##	#####
#	HYL	01	##	GEN
#	HYL	01	##	NBS
#	HYL	01	##	#####

In the above example, the items of the LAW sublibrary with status 01 from the GEN collection are the most preferred. If these items are not available, then items of the LAW sublibrary with status 01 from the NBS collection should be used. If they are also not available, then the rest of the LAW items should be considered.

Only if all items similar to LAW items are not available should HYL items be considered.

Note that in the above example, the definitions are the same for both hold requests and photocopy requests. It is possible to define a different setup for hold and photocopy requests by setting column 1 accordingly.

### **11.18.2. Defining the Relevant Pickup Locations for which the Preferred Items Mechanism is Applied**

The preferred items mechanism is applied by the requests handling daemon (UE\_06) only for requests that have a pickup location that is listed in tab\_req\_preferred\_loc in the ADM library's tab directory.

**Note:** If the table does not exist or is empty, the preferred item mechanism is applied for any pickup location.

### **Table Structure**

#### **Column 1: pickup location**

Size: 5

### **Table Example**

```
! 1
!!!!
HOME
LAW
```

In the above example, the preferred items mechanism are applied to requests that are requested for pickup at the HOME or LAW pickup locations.

#### **11.18.3. Defining Check Routines to Check if the Preferred Item is Available**

The ue\_06 requests daemon attempts to use an available preferred item. The preferred item is considered available if it passes the check routines defined in tab\_hold\_request (sections UE06-LIKE, UE06-PREF) for hold requests or tab\_photocopy\_request (section UE06-AVAIL for photocopy requests.

#### **11.18.4. UE\_06 Processing of the Requests**

Ue\_06 attempts to fulfill hold and photocopy requests created in WEB OPAC, which are requested for one of the pickup location listed in tab\_req\_preferred\_loc by a preferred item:

Items of the requested title that are preferred according to tab\_req\_preferred are checked:

- Do they match the item enumeration and chronology values of the item on which the request was made?
- Are they available?

The order in which the items are checked are according to the order of the tab\_req\_preferred lines. The most preferred items are checked first.

The first available preferred item that is found is used – i.e. this is the item that is printed on the slip.

In case of a hold request – the request moves to this item.

In case of a photocopy request – PHOTO-USE-EXACT should be used in order for the request to move to this item.

If no preferred item is available, the request is filled by the regular Aleph request fulfillment mechanisms.

#### **Note:**

The preferred items mechanism should be used only when PHOTO-REQUEST-STYLE is 3.

### **11.19. Staff Request**

The Central Library is a library that offers services to subscribed libraries. Subscribed libraries may request material from the central library on behalf of their patrons.

The subscribed libraries are identified in the central library as "pseudo patrons", but their patrons are not identified in the central library.

When a patron of the subscribed library wants to request material from the central library, the staff of the subscribed library creates the request for the patron.

The staff of the subscribed library connects to the OPAC of the central library using the subscribed library's account.

When connected to the subscribed library's search base, the request forms for hold and photocopy are altered to include a field for the patron's name. The staff of the subscribed library fills in the request details, including the information of the requesting patron in the requester name field.

When the form is submitted, standard photocopy checks are done based on the subscribed library's logon information. The request is linked to the subscribed library's user, with the requester name saved in the Z37-REQUESTER-NAME / Z38-REQUESTER-NAME fields.

If cash charges are created, they are charged to the subscribed library's user, and the Z31-REQUESTER-NAME field is populated with the name of the requester.

To enable the staff request flow, the following steps should be applied by the System Librarian:

1. Define the subscribed library's account.
2. Add "requester name" fields to hold and photocopy forms in the OPAC.
3. Add "requester name" columns to request lists.
4. Add sort options based on the requester name.

### **11.19.1. Defining the Subscribed Library's Account**

Define a new "pseudo" patron for the subscribed library with permissions according to the central library's policy.

The status of this patron indicates that it is not a regular patron but a subscribed library.

### **11.19.2. Adding "requester name" Fields to Hold and Photocopy Forms in the OPAC**

Refer to the **Requester Name Field on Request Creation Forms** chapter of the Aleph 21 System Librarian's Guide - OPAC for details.

### **11.19.3. Adding "requester name" Columns to Request Lists**

1. Display requester name information in the Patron Tab → hold requests list, by adding the following line to ./<BIB library>/tab/pc\_tab\_col.lng:

```
PC_CIR_B_HOLD_LIST      L Requester Name          21 000 04 C04
Requester name
```

2. Display requester name information in the Item Tab → history → hold requests

list, by adding the following line to ./<BIB library>/tab/pc\_tab\_col.lng:

```
PC_COM_HOLD_H_LIST      L Requester Name          11 000 04 C04
Requester Name
```

3. Display requester name information in the Patron Tab → photocopy requests list, by adding the following line to ./<BIB library>/tab/pc\_tab\_col.lng:

```
PC_CIR_B_PHOTO_LIST    L Requester Name          08 000 04 C04
Requester name
```

4. Display requester name information in the Patron Tab → historical photocopy requests list, by adding the following line to ./<BIB library>/tab/pc\_tab\_col.lng:

```
PC_CIR_B_PHOTOH_LIST  L Requester Name          06 000 04 C04
Requester Name
```

5. Display requester name information in the Patron Tab → cash list, by adding the following line to ./<BIB library>/tab/pc\_tab\_col.lng:

```
C_CASH_SUMMARY         L Requester Name          22 000 04 C04
Requester Name
```

Refer to the **Requester Name Field In My Library Card** chapter of the System Librarian's Guide -OPAC: for more details about adding the requester name field's information in the OPAC.

#### 11.19.4. Adding Sort Options Based on the Requester Name

Sort the Patron Tab → hold requests list according to sublib, pickup location, open date, and requester name, by setting 06 in the circ\_user\_z37\_sort\_routine environment variable (defined in pc\_server\_defaults).

The Patron Tab → photocopy requests list can be sorted according to the following sort options:

- Pickup Location / requester name / photocopy number
- Sub library / requester name / photocopy number
- Pickup Location / Sub library / requester name / photocopy number
- Pickup Location / Status / requester name / photocopy number
- Sub library / Status / requester name / photocopy number
- Pickup Location / Sub library / Status / requester name / photocopy number
- Pickup Location / Status / Sub library / requester name / photocopy number

These options are defined in ./<ADM library>/tab/tab\_z38\_sort, and matching entries in

./<ADM library>/tab/pc\_tab\_exp\_field.lng under PHOTO-SORT-TYPE..

Refer to the **tab\_z38\_sort** section of the Aleph 21 Configuration Guide for more details.

- Sort the Patron Tab → Cash List according to transfer number, date, and requester name, with the 09 sort routine in ./<ADM library>/tab/tab\_z31\_sort, and define matching entries in ./<ADM library>/tab/pc\_tab\_exp\_field.lng under CASH-SORT-TYPE.

- Sort the Patron Tab → Cash List according to requester name, by using the 10 sort routine in `./<ADM library>/tab/tab_z31_sort`, and define matching entries in `./<ADM library>/tab/pc_tab_exp_field.lng` under CASH-SORT-TYPE.

Refer to the **tab\_z31\_sort** section of the *Aleph 21 Configuration Guide* for more details.

Refer to the **Sort Based On Requester Name Information** section of the System Librarian's Guide - OPAC for more details about sorting using the requester name field's information in the OPAC.

## 12. Setup for Recalls

**For the System Librarian:** To enable the Recall functionality, set up the following tables:

### 12.1. tab16

Define the recall period, the minimum guaranteed loan period and the fine method.

- Fill in column 19, No. of Days for Recall Notice, to define the number of days from the day the recall notice is sent to the new due date (this is referred to as the recall period). This sets the new due date.
- Fill in column 20, Minimum Guaranteed Loan Period, to define the minimum guaranteed loan period. This is the number of days that the original patron can have the item on loan, even if it has been requested by another patron and recalled.

In order for the system to generate a special extra fine for overdue recalled items, define the related fine method in tab16.

- In column 14, Fine Method, fill in the fine method according to library policy. Use only those methods that are marked as "include recall". One of the options that you can choose from is fine method number 7 which will take the recall into account when the item is returned late.

### 12.2. tab18.lng

Define fine rates for late return of recalled items. This is required when you use fine method number 7 that takes the recall into account when the item is returned late. To do so, edit tab18.lng. Examples of the relevant lines of this table are shown below:

```
0050 ##### ## Y 2.00          Recall late return fine
0051 ##### ## Y 4.00          Rush Recall late return fine
0052 ##### ## Y 1.50          Recall max fine ratio
0053 ##### ## Y 1.50          Rush Recall max fine ratio
```

The amounts specified in column 5 can be treated as an amount or as a ratio (depending on the setup in tab100). When a ratio is used the number 1.5 in column 5 will mean that in addition to the fee on the late return, the patron will be charged an

extra 1.5 times the late fee because the item was recalled. In other words, instead of paying a fee of X, the patron will pay a fee of  $X + 1.5X = 2.5X$ .

### 12.3. tab100

Define the recall related variables in tab100. These variables determine the way Recall works in your system.

**OVERDUE-RECALL-RATIO.** This variable defines whether lines 0050-0055 in tab18.lng (fines relating to recalled items) are treated as a ratio or as an actual amount.

**UPDATE-RECALL-DATE.** This variable determines whether, when an item is loaned and there is a matching outstanding hold request, the loaned item should immediately be considered "recalled", or whether a loaned item becomes "recalled" only through the Recall Items on Loan (cir-13) batch service.

- Y - loaning an item can trigger a recall (Z36-recall-date and z36-recall-due-date are automatically set at time of loan if there is a matching "O" request)
- N - recall of a loaned item (update of Z36-recall-date and z36-recall-due-date) is triggered only by the Recall Items on Loan (cir-13) batch service.

**RECALL-METHOD.** This variable determines whether the Z36-ORIGINAL-DUE-DATE is updated and what due date will be displayed as the loan's due date in the GUI and in the Web OPAC.

- 1 - Let renewals update the z36\_due\_date and let recalls update it, if the recall-due-date is earlier. Use the z36\_original\_due\_date as the "due-date-before-recall". (Let renewals update it.)
- 2 - Let renewals update the z36\_due\_date. Do not actually update the z36\_due\_date to the recall-due-date. But, if the latter is earlier than the z36\_due\_date, use the latter as the "effective due date". Leave the z36\_original\_due\_date as the actual, original due date. (Do not let renewals update it).
- 3 - Same as 2, except always use the recall-due-date as the effective due-date, even if later.

**ONLINE-RECALL.** This variable sets the library policy regarding online recall.

- Y - any request that is created in the GUI and is required for recall will trigger a recall when the request is submitted.
- N- recall will be triggered only when the 'Recall Items on Loan (cir-13)' service will be run.

**RESET-LETTER-NUMBER.** This variable sets whether an online recall of an item will reset the loan's Z36-LETTER-NUMBER field.

- Y - reset the Z36-LETTER-NUMBER field when an online recalled is triggered by the GUI.
- N - do not reset the Z36-LETTER-NUMBER field when an online recalled is triggered by the GUI.

## 13. Print Templates

### 13.1. Available Templates

The names of the Circulation template files are as follows (where nn is a number identifying the version):

#### GUI Templates

Template	Purpose	print.ini function name
Advance Booking Cancellation Letter item-sched-delete-letter-s-nn item-sched-delete-letter-nn		
Patron Summary bor-list-nn	May be sent from the Patron Information screen by choosing LIST after clicking the Letter button.	BorLetterLIST
Cash Transaction Details cash-line-details-nn	Show full details of single cash transaction record	SingleCashTrans
Hold Request Filled hold-request-letter-mm-nn	hold-request-letter-01-nn - hold shelf hold-request-letter-02-nn - home delivery hold-request-letter-03-nn - mailbox delivery hold-request-letter-04-nn - reading room hold-request-slip-nn (with "p" letter)	ReturnHoldnn (01-04) HoldLetternn (01-04) HoldLetterDeleten (01-04)
Hold Request Not Filled hold-request-wait-nn		HoldWait
Hold Request Slip hold-request-slip-nn	The "Requested by:" section refers to a hold placed by a proxy for his patron and is not displayed at all if the hold has not been placed by a proxy.	ReturnHoldnn HoldLetternn
Item Note item-slip-nn		ItemSlip

<b>Template</b>	<b>Purpose</b>	<b>print.ini function name</b>
Letters to Patrons borrower-letter-a-nn borrower-letter-b-nn borrower-letter-c-nn borrower-letter-d-nn		BorLetter
Library Card bor-card-label-nn	may be sent from the Patron Information screen by choosing CARD after clicking the Letter button	BorLetterCARD
Loan receipt loan-receipt-nn		LoanReceipt
Lost Material Bill lost-material-bill		LostMaterialBill
Photocopy Request Filled - Pickup photo-request-letter-p-nn		PhotoLetter ReturnPhoto
Photocopy Request Not Filled photo-request-wait-nn		PhotoWait
Photocopy Request Letter photo-request-letter-d-nn	Letter to patron informing him that his photocopy request has been filled and the item is attached (because the patron's delivery type is "deliver").	PhotoLetter ReturnPhoto
Photocopy Request Slip photo-request-slip-nn		PhotoSlip
Reading Room Report reading-room-report-nn	Online Reading Room Report	RRReport.prn
Reading Room Shelf Report rr-shelf-report-nn	Online Reading Room Shelf Report	RRShelf.prn
Renew All bor-list-renew-all	List of the patron's loans that were renewed and the reasons for not renewing others	BorListRenewAll BorListRenewAllRemote
Return Receipt		ReturnReceipt



<b>Template</b>	<b>Purpose</b>	<b>print.ini function name</b>
return-receipt-nn		
Single Hold Request has been Deleted hold-delete-letter-s- nn		HoldDelete (01-04)
Station Cash Report cash-site-payment-nn		StationReport
Transfer Slip transfer-slip-nn		TransferSlip
Patron Cash Summary Statement cash-summary-nn		TransLetter
Patron Circulation Summary bor-list-nn		
Cash Receipt cash-pay-receipt-pay		Payletter
Cash Receipt cash-pay-receipt- refund		Payletter
Cash Receipt cash-pay-receipt- waive-debit		Payletter
Advance Booking Schedule item-schedule		
Payments Received Report payment- received-report-nn		
Automatic Return Letter auto-return-letter-nn	Return letter that is created if the 'Create Return Receipt on Automatic Return' Loan option is on, the tab100 variable RETURN- DURING-LOAN is "1" or "2", and the item being checked out is registered as on loan to another patron.	AutoReturnLetter

### Services Templates

<b>Template</b>	<b>Purpose</b>
-----------------	----------------

<b>Template</b>	<b>Purpose</b>
Advance Booking Schedule Report reserve-item-schedule	Generated by cir-09
Cash Patron Letter cash-user-letter-nn	Generated by cash-05
Cash Transaction Report cash-transaction-report-nn	Generated by cash-02
Claimed Returned Items Report claimed-returned-items-report-nn	Generated by cir-19
Courtesy letters loan-notice-letter-nn	Used when the "automatic renew" option in the "Print Courtesy Notices" service (cir-10) is not checked.
Debt Notice Letter debt-notice-letter	Generated by cash-06
Expired Hold Requests Report / Deleted Expired Hold Requests Report lapsed-holds-nn	Generated by cir-17
Hold Delete Letter hold-delete-letter-nn	Generated by cir-06
Hold Request Wait Letter hold-request-wait-00	Generated by cir-12
Hold Request Slip hold-request-slip-00 hold-request-slip-01	Generated by cir-12
Hold Requests Report hold-requests-report	Generated by cir-07
Hold Shelf Report hold-shelf-report-nn	Generated by cir-06
Loan Notice Renewal Letter loan-notice-renew-letter-nn	Used when the "automatic renew" option on the "Print Courtesy Notices" service (cir-10) is checked, and the patron has items that have been renewed.
Loan Renewal Report loan-renewal-report	Generated by cir-08
Loan Report loan-report	Generated by cir-04
Lost Items That Were Returned returned-lost-items-summary-00	Generated by cir-16
Lost Material Bill lost-material-bill-nn	Generated by cir-50

<b>Template</b>	<b>Purpose</b>
lost-material-bill-m-nn	
Lost Material Summary Bill lost-material-summary-nn	Generated by cir-51
Outstanding Loan Requests outstanding-loan-requests	Generated by cir-11
Overdue Items Single Letter overdue-sum-single-0 overdue-sum-single-0-nn overdue-sum-single-1-nn overdue-sum-single-2-nn overdue-sum-single-3-nn overdue-sum-single-4-nn	Generated by cir-52
Overdue notice(single item per notice) overdue-letter-0 overdue-letter-0-nn overdue-letter-1-nn overdue-letter-2-nn overdue-letter-3-nn overdue-letter-4-nn	"0" is first notice, "1" is second notice, and so on.  Generated by cir-50
Overdue Summary overdue-summary-0 overdue-summary-0-nn overdue-summary-1-nn overdue-summary-2-nn overdue-summary-3-nn overdue-summary-4-nn	Generated by cir-51
Patron List Report borrower-list-report-nn	Generated by cir-05
Patron Loader - Deleted Patrons patron-delete-approved	Generated by cir-23
Patron Loader - Rejected Patrons patron-delete-rejected	Generated by cir-23
Photocopy Requests photo-request-letter-d-00 photo-request-letter-p-00 photo-request-slip-00 photo-request-slip-01	Generated by cir-22
Photocopy Request Wait Letter photo-request-wait-00	Generated by cir-22
Recall Loan loan-recall-1-nn loan-recall-2-nn loan-recall-3-nn	loan-recall-1-nn - used when the due date of the recalled item has been changed. loan-recall-2-nn - used when the recall does not trigger a change in due date.

Template	Purpose
	loan-recall-3-nn - used when a request was cancelled and therefore the recall is also cancelled. Generated by cir-13
Report of Items in High Demand items-in-high-demand	Generated by cir-14
Report of Items in Reading Room items-in-reading-room	Generated by cir-15

## 14. Drop-down Lists

Many of the choices available on the drop-down lists of the Circulation GUI have been set by the developers and you may not add or delete choices. However, you may add or delete choices for some of the lists. The major Circulation drop-down lists that can be edited are:

### Patron Status

You can add new patron statuses by editing the `pc_tab_exp_field_extended.lng` file for a sublibrary-sensitive list. For a standardized list that is not dependent on a sublibrary filter, add patron statuses by editing the `pc_tab_exp_field` file. In both files, the list is identified by the ID "BOR-STATUS." Make sure that the code for the patron status you want to add is present in `tab31`.

### Patron Type

You can add new patron types by editing the `pc_tab_exp_field_extended.lng` file for a sublibrary-sensitive list. For a standardized list that is not dependent on a sublibrary filter, add patron types by editing the `pc_tab_exp_field` file. In both files, the list is identified by the ID "BOR-TYPE."

### Block Code

You may add new block codes by editing `tab_delinq.lng`.

### Letters to Patrons

If you have defined new templates for letters to patrons (that are sent from the Patron Information screen), be sure to add new list choices by editing the `pc_tab_exp_field` file. In that file, the menu is identified by the ID "BOR-PRINT."

### Address Type

You may add new Address Types by editing the `pc_tab_exp_field` file. In that file, the list is identified by the ID "USER\_ADDRESS\_TYPE." If this type represents a periodical address, be sure to edit `tab_bor_address` accordingly.

### Language

This is the language of correspondence with the patron. You may add new language choices by editing the `pc_tab_exp_field` file. In that file, the list is identified by the

ID "PATRON-LANGUAGE." Be sure that the language you add here has also been defined in `./alephe_tab/allowed_languages`.

### ILL Library

You may add new ILL Libraries (as long as they also appear in the `tab_sub_library` file by editing the `pc_tab_exp_field` file. In that file, the list is identified by the ID "ILL-LIB."

### Notes 1, 2, 3

You may add new options to the list for Notes 1, 2 and 3 of the Global Patron Information screen by editing the `pc_tab_exp_field` file. In that file, the lists are identified by the IDs "FIELD1," "FIELD2" and "FIELD3".

See also the `pc_tab_exp_field` and the `pc_tab_exp_field_extended.lng` tables for additional lists.

## 15. Catalog Item

The Catalog Item function (available on the Item menu) enables you to briefly catalog an item with minimum information. The System Librarian is responsible for setting the fields that are displayed on the Catalog Record form and which of these fields are mandatory.

To do so, go to the Bibliographic library's `tab` directory and edit the `pc_tab_circ_fast_cat.lng` file (where "lng" is replaced by the code for the language). Following is an example of that file:

```

!   2   3           4           5
!-!!!!-!-!!!!!!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!-!
Y 100   a Author
N 245   a Title (mandatory)
Y 260   a Place
Y 260   c Date
G 035   a Sys Control No (Group)
G 020   a ISBN (Group)
G 022   a ISSN (Group)

```

- **Column 1:** Field control.  
Optional values are:  
Y = the field is optional  
N = the field is mandatory  
G = At least one of the fields, marked with G, is mandatory when fast cataloging is performed.  
H = the field is hidden. The field content is taken from this table, and not input in the form.
- **Column 2:** Field code.
- **Column 3:** Subfield code.
- **Column 4:** Field name or text of hidden field.

- **Column 5:** BIB line: This is only relevant for an ADM table and will cause any lines in the corresponding BIB table to be ignored.

For entering fields for an ADM record, edit a table with the same name located under the ADM library tab directory. This is optional. The table in the ADM library can be left empty, but must be present.

Note that there is an option to determine the bibliographic fields in the `pc_tab_circ_fast_cat.lng` table located in the administrative library by using column 5 of the table to specify that the tag is a Bibliographic tag.

If the `pc_tab_circ_fast_cat.lng` table located in the administrative library includes at least one line with a tag that is specified as a BIB tag, the `pc_tab_circ_fast_cat.lng` table in the Bibliographic library will be ignored.

This option can be used by a Multi-ADM environment as well by a single-ADM environment.

You can set up your system to automatically create a hold request, so that the item can be transferred to the Cataloging department to complete the cataloging process.

## Steps

Configure the FAST-CAT-HOLD-ID variable in `tab100`. This variable determines the ID for which a hold request will be created when an item is created using the Fast Cataloging option. If this entry does not exist, then if the library uses user-sharing, the ID will be "CATALOGER". If the library does not use user-sharing, the ID will be a concatenation of "CAT-" and the library name.

Create a Global Patron with the required ID. If the FAST-CAT-HOLD-ID variable in `tab 100` is set to a patron ID, make sure such a patron exists. If FAST-CAT-HOLD-ID is not set to a patron ID, make sure that either a Global Patron is defined with a CATALOGER ID, or that the ADM library's code is prefixed by "CAT-" if the library does not use user sharing.

You can set a default "from date" for the automatically generated hold request of the "CATALOGER" patron when an item is processed through Catalog Item. The default is set in `alephe_root/pc_server_defaults`:

```
setenv circ_cataloger_request_date      001
```

## 16. Item Reshelving Time

The item reshelving time is the amount of time it takes to reshelv an item after it is returned. When an item is in the process of being reshelved, this condition will be displayed in the Item List of the Circulation module.

To define the item reshelving time, edit `tab14`. Following is an example from that table:

```
! 1      2      3      4      5
!!!!-!!!!-!!-!!-!!!!
UEDUC GEN  ## ## 0115
```

```

UEDUC ##### ## 04 0100
ULINC ##### ## ## 0115
UMUSI ##### ## ## 0115
UHLTH GEN ## ## 0115
##### ##### ## ## 0015

```

- **Column 1:** is the sublibrary. This information is mandatory. For "all sublibraries," enter ##### .
- **Column 2:** is the collection. For "all collections," enter ##### .
- **Column 3:** is the item status. For "all statuses," enter ## .
- **Column 4:** is the item process status. For "all statuses," enter ##.
- **Column 5:** is the item reshelving time, that is, the number of hours and minutes it takes to reshelve an item after it is returned. (Note that the maximum number of minutes is 59.)

## 17. Item List

You can determine whether the Item List in the Circulation GUI client will display all copies of a bibliographic record, or only those copies on loan. To do so, open the GUISYS.INI file (found in the client's CIRC/TAB directory). Go to the [ItemList] section. Following is an example of what you may find there:

```

[ItemList]
FilterType=0

```

If you want the Item List to display all copies of a bibliographic record, type **0** to the right side of the equal (=) sign. If you want the Item List to display only those copies on loan, type **1**, instead.

This is a default setting which can be changed on the item list by checking (or removing check mark) in the "Loan Filter" check box.

There is a drop-down list for choosing the sort order of the list of items. When the "Loan Filter" is cleared, the choices are the same as the choices available in OPAC and ITEMS; when the Loan Filter is selected, you can choose the sort type from a list that is defined in the ADM library's /tab/pc\_tab\_exp\_field.lng table where column 1 is LOAN-SORT-TYPE. The codes in column 4 of this table are the sort options that are defined in the tab\_z36\_sort table. Note that the sort type drop-down list in the patron's loan list is also defined in the pc\_tab\_exp\_field.lng configuration table where column 1 is LOAN-SORT-TYPE.

## 18. Advance Booking Slots

In order for a patron using the Web OPAC to be able to advance booking items, you must set up the reserve advance booking schedule. This schedule shows the time intervals or "time slots" for which an advance booking item may be booked in advance.

To set up the schedule, edit `tab43`, an expanded table for defining advanced booking parameters. It defines the time slots available for placing an advance booking request. The table allows for the definition of the start day and hour, as well as the end day and hour. It can also be used to define "closed" times, that are independent of `tab17`.

Note that an item can be reserved for a patron for up to three days; therefore, the time slots should be defined to a maximum of three days.

An example from the table is shown below:

```
!-!!!!-!!-!!!!!!!!-!!-!!!!-!!-!!!!
P WID## 44 20051101 00 1300 01 0900
      01 0900 01 1100
      01 1100 01 1300
      01 1300 01 1500
      01 1500 01 1700
      01 1700 01 1900
      01 1900 02 0900
      02 0900 02 1100
      02 1100 02 1300
      02 1300 02 1500
      02 1500 02 1700
      02 1700 02 1900
      02 1900 03 0900
      03 0900 03 1100
      03 1100 03 1300
      03 1300 03 1500
      03 1700 03 1900
      03 1900 04 0900
      04 0900 04 1100
      04 1100 04 1300
      04 1300 04 1500
      04 1500 04 1700
```

You can define an entire schedule and in addition define days where the slots are different from the schedule as a whole. To do so, use the E line type to define the exact day.

The definition can be of a slot that is different from the one already set for the scheduled period.

For example: The regular slot is:

```
P ##### 60 20040101 01 0900 01 1100;
```

The P stands for settings of a period and will include the date until which the definition is valid. The settings for the irregular slot are:

```
E ##### 60 20030930 00 0900 00 1700;
```



The E indicates that the following line is a definition of an exact day. The 00 in an E type of line indicates that the definition is for the day listed in column 4.

A 00 in a P type of line, still stands for Sunday.

The slot in this example starts on 09:00 and ends at 17:00 on the same day.

The slot can also be defined to end the next day in the following way:

```
E ##### 60 20030930 00 0900 01 0900;
```

In this case the slot starts at 09:00 on the day listed in column 4 and ends at 09:00 one day after that.

Another option is to define a date that is included in the schedule period and on which no slots will be open.

To do so, leave columns 5-8 empty in the following way:

```
E ##### 60 20030930
```

This indicates that on September 30th, there are no slots available for item status 60.

To define two closed days in a row, set a line for each day.

You can use ## instead of the year, month or day in an E type of line. This way it is possible to create a more general definition for days on which no slots will be created or for different settings of time slots.

For example:

```
E ##### 60 200310##
```

This definition indicates that no slots will be created for October 2003.

```
E ##### 60 2003##01
```

This definition indicates that no slots will be open for the 1st of every month in 2003.

To define a time slot that continues to the following week, the following days which represent the end of the time slot (column 7) can be inserted: 07, 08, or 09.

For example:

```
06 0900 09 1100
```

In this example, the slot starts on Saturday at 0900, and wraps around the weekend, ending on the following Monday, at 1100.

---

**Note:** In order to see periodic slots for days before the E lines, the P lines must come before the E lines.

---

---

**Note:** There is a limit of 100 time slot lines (columns 5 to 8) for each group of columns 1 to 4 (Line Type, Sublibrary, Item Status, and End of Period Date).

---

#### Key to Table:

- **Column 1** is the line type. The available values are P, to indicate that the slots are for a period, and E, to indicate that the slots are for an exact date.
- **Column 2** is the sublibrary for which the schedule is being defined. Use ##### to define all sublibraries.
- **Column 3** is the item status (from tab15) which will be used for reserve items.
- **Column 4** is the date up until which the schedule is valid. Enter the date in the format yyymmdd.
- **Column 5** sets the beginning day (00=Sunday) of the time slot during which patrons may borrow reserve items.
- **Column 6** sets the beginning hour and minutes of the time slot. The system uses a 24-hour clock, so for 6 p.m., enter **1800** . (Note that a colon (:) is **not** used to separate the hour from the minutes.)
- **Column 7** sets the end day of the time slot. Enter the number of days since Sunday. For example, enter 08 to specify the Monday that is 8 days after the first Sunday. (Note that in this case, column 5 can be 05 or 06).
- **Column 8** sets the end hour and minutes of the time slot. The system uses a 24-hour clock, so for 11 p.m., enter **2300**. (Note that a colon (:) is **not** used to separate the hour from the minutes.)

**Note:** Be sure to separate one time slot from another by a semi-colon (;).

#### Note

Apart from being confined to predefined time slots, an advance booking request is a regular booking request and it is managed by the system in the same manner as regular booking requests. Please refer to section [48 Booking Requests](#) on page [142](#) for a description of the booking request setup.

## 19. Valid Dates of Patron Addresses

There are two ways to define the valid dates of the patron's address. One way is to edit the from-to dates on the patron address record (Z304), and use the accompanying setup of type "02" for the mailing address and type "01" for the permanent address. Alternatively, the library can opt to set the validity period on a system-wide basis. In this case, the convention of "01" for permanent address and "02" for mailing address is irrelevant. This system-wide option is set in the administration library, in tab\_bor\_address. If there is a period defined in the table, then the system wide address conventions are in effect.

Note that the two methods cannot be used together.

The `tab_bor_address` definitions include the From date, the To date and the Address type:

```
19991001 19991223 21
19991224 20000109 22
20000110 20000615 23
20000616 20000923 24
20000924 20001223 21
```

Each line defines which address-type identification is in effect for a time period. The periods defined must be continuous, and must not overlap.

- If the address period is defined in `tab_bor_address`:
  - The "valid from-to" dates fields from the Z304 record are not displayed on the WEB update form (`www_f_lng/bor-update`).
  - When the patron updates his address record using the Web form (`www_f_lng/bor-update`), the current record will be updated. If there is no current record, the record that suits the immediately preceding line in `tab_bor_address` will be updated (only one line up).
  - In the same manner, when the system searches for the appropriate patron address record for a printout, if there is no record with the address type expected according to the time period in `tab_bor_address`, the system takes the record that has the type registered in the previous line in `tab_bor_address`, and duplicates it, assigning the expected address type.
  - The system's default address type will be the one that is valid according to the date ranges that are listed in `tab_bor_address`. This means that when a patron is created, the default address type that will be created will be the one that is currently active according to this table.
- If the address period is NOT defined in `tab_bor_address`:
  - Updating the address in the Web form (`www_f_lng/bor-update`) will change the last record.
  - When the system determines which address record to use, if there is more than one record with relevant valid from-to dates, the system chooses the record type 02 with the highest sequence number. Remember, when sending notices to the patron, the system first searches for an address of type "02" where the date of the notice falls within the valid from-to period. If the system does

not find a suitable 02 address, the system then searches for a suitable 01 address.

- The system's default address type and validity range will be based on the ADM library's tab100 variable named DEFAULT-ADDRESS. This variable sets both the default address type and the number of days, starting from the patron creation date, on which the address will be considered valid. The default will be stored in the Patron Address's Date From and Date To fields.

## 20. Item History and Summary Window

There are two tabs on the Item History window which is accessible from the Item List. One tab is for previous loans and the other is for previous hold requests.

You can determine whether or not the system will store information about **previous** loans and hold requests by editing the tab100 table. Following are the relevant lines in tab100:

```
CREATE-Z36H=Y  
CREATE-Z37H=Y
```

In the above lines, Z36H refers to loans and Z37H refers to hold requests. If you want the system to store the information, enter Y (as shown above). If you do not want the system to store the information, enter N, instead.

The columns for displaying the information about **previous** loans and hold requests in the Item History and Summary window are defined in pc\_tab\_col. The codes in that table are: PC\_COM\_LOAN\_H\_LIST (for Previous Loans) and PC\_COM\_HOLD\_H\_LIST (for Previous Hold Requests).

## 21. Loan and Return Windows

The content of the Patron Details window is determined by the System Librarian in the user-details display template. See the Setup for Expanded Information Display section of the General - System Librarian chapter for more details.

## 22. Cash

### 22.1. Cash Transaction Information Window

On the Cash Transactions tab of the Patron Information window, there is a Status column with text such as Paid, Not Paid, Cancelled, Credited, Not Paid By/Credited to Patron. This text is defined in \$aleph\_root/error\_lng/cash\_status\_heading.

In `tab_attr_sub_library`, type "5" is used to set under which sublibrary a general cash transaction (that is, one which does not belong to a specific sublibrary) will be registered. If this section is left empty, the transaction will be automatically registered under the active ADM library.

In `tab_attr_sub_library` type "6" is used to identify a workstation/library for CASH, as follows:

If an IP station has a sublibrary registered as type 6, when the Cash tab of the Patron Information window is viewed, only the transactions belonging to that sublibrary are displayed. In addition, the Sum to Pay is updated according to that sublibrary and contains only the sum owed to that specific sublibrary. You can define multiple sublibraries for one IP station.

A staff user can sort the cash list by selecting a choice from the drop-down list that is defined in the ADM library's `/tab/pc_tab_exp_field.lng` table where column 1 is CASH-SORT-TYPE. The codes in column 4 of this table are the sort options that are defined in the `tab_z31_sort` table.

## 22.2. Cash Receipt Numbering

Cash receipts can have separate counters by IP address/station ID.

Attribute type 8 in column 2 of `tab_attr_sub_library` enables use of different cash receipt counters by IP address/station ID. If type 8 is defined in column 2 of `tab_attr_sub_library`, the cash receipt number is based on the UTIL/G/2 counter `last-cash-rec-<suffix>`. The name of the IP address/station ID registered as type 8 has to match the suffix of `last-cash-rec-<suffix>`.

If type 8 in column 2 of `tab_attr_sub_library` is not defined, the cash receipt number is based on the UTIL/G/2 counter `last-cash-receipt-no` and not on the counter `last-cash-rec-<suffix>`. In this case cash receipt numbering is unified for all stations.

## 22.3. E-mails Free of Charge

You can set up the system to refrain from charging postage for e-mail. This function is only available for the following cash transactions: 0015, 0042, 0080, 0081, 0082, 0083, 0090, 1024, 1026, 1027, 1028. Use column 6 in `tab18` in order to define whether a patron with an e-mail address should be charged for a specific library service or not.

The line

```
form-print-method EMAIL S
```

has to be present in the matching translation file and column 4 in `print.ini` has to be set to "M" to ensure that notifications are sent via e-mail. The patron's currently valid address has to include an e-mail address. Please note that the system only checks whether an e-mail address exists in the Z304 address record and not if it is valid.

## 22.4. Cash Reports

Cash reports can be created either online from the **Reports** menu, or by running the 'Payments Received Report (cash-03) service. In both cases, the output report includes a line for summary of each group of transactions (depending on how the user decided to group them), a line for the balance of each group, and a line for the full sum owed.

The texts that are used by the reports for these lines are taken from the \$Saleph\_root/error\_lng/cash\_report\_heading.

### Cash Transaction Report (cash-02)

This service produces a report of cash transactions for library patrons. Note that 15 is a special report format. Use it to include patron information in each line and not only in the first line of each new patron.

## 23. SQL Queries

SQL queries are used to retrieve information about various circulation transactions. The Z35 Oracle table stores information about transactions. The field within this table called Z35-EVENT-TYPE has the following values which may be used in SQL commands to retrieve data:

- 31 - Creating New ILL Request
- 50 - Simple Loan
- 51 - Reading Room Loan
- 52 - Offline Loan
- 53 - Advance Booking Loan
- 54 - Routing List Loan
- 55 - ILL Loan
- 56 - Transfer Loan
- 57 - Remote Storage Loan
- Delete Loan
- 59 - Maintenance Loan
- 61 - Return
- 62 - Web OPAC Renewal
- 63 - GUI Renewal
- 64 - Batch Renewal (automatic renewal performed by the services cir-08 and cir-10)
- 65 - Item Declared Lost

- 66 - Item Claimed Returned
- 71 - Expand Hold Request on Available Item
- 72 - Non-Expand Hold Request on Available Item
- 73 - Expand Hold Request on Nonavailable Item
- 74 - Non-Expand Hold Request on Nonavailable Item
- 75 - Reserve Advance Booking Item
- 76 – Rush Cataloging Requests
- 80 - In-house Use
- 81 - Photocopy Request
- 82 - Return of Item Not on Loan
- 90 - Booking
- 91 - Booking turning to Loan
- 92 - Delete Booking
- 95 - Other Institute Fulfillment
- 96 - Item Is Received at Pickup Location

Standard Circulation Reports based on SQL are accessible from the GUI Circulation module.

Circulation transactions will be registered according to the setup of `tab_events.lng` of the administrative library.

## 24. Audio Warnings

For the Loan and Return windows, you can set the system to assign audio warnings to program events by editing the `circ.ini` file on the client, under the `[ErrorAction]` section.

To define an audio warning:

1. Make sure the sound you want to set is defined in Windows to produce an audio signal. click **Start > Settings > Control Panel > Sounds and Multimedia**. (This might be different depending on the version of Windows that you are using.) For example, for Exclamation, select `chimes.wav`.
2. Check that you can hear sounds in your PC.

3. In `circ/tab/circ.ini`, in the `[ErrorAction]` section, type `Y,S`, at the end of the program event to which you want to assign an audio warning, together with the name of the sound you want. The syntax is:

`<ProgramEvent>=<Y,S,SoundName>`

For example:

```
NoUser=Y,S,Exclamation
NoBorrower=Y,S,Asterisk
ItemTransfer=Y,S,Beep
```

The following are the names of the program events for which you can define an audio warning:

```
NoUser=N
NoBorrower=N
LoanError=N
ReturnError=N
UserError=N
ItemError=N
ClaimReturn=N
LostReturn=N
LoanDenied=N
ReturnDenied=N
ItemTransfer=N
ItemRequested=N
LoanSuccess=N
ReturnSuccess=N
OnHold=N
UserVerification=N
RemoteReturn=N
ReturnIllLend=N
OnHoldReturn=N
```

The options for every sound are:

1. `SoundName=N` – No sound.
2. `SoundName=Y,S`, System sound name - This setting uses a system sound for the sound name. The list of available system sounds is listed below.
3. `SoundName=Y,F`, Sound file name - This setting uses a sound file for the sound name. The sound file should be placed in the `Alephcom\Sound` directory.

For example:

```
NoBorrower=N
NoBorrower=Y,S,Beep
NoBorrower=Y,F,RINGOUT.WAV
```

The available sounds at the moment are Windows standard sounds:

- QUESTION
- EXCLAMATION



- OK
- HAND
- BEEP
- ASTERISK

## 25. Item Process Status

Items with a defined process status are called "in process". These items are not available for loans as long as they are in process. Therefore, such an item should be registered as col 6 = N in `tab15.lng`. Furthermore, they may be requested, and in this case, they are registered as col 8 = Y or col 8 = C in `tab15.lng`. When such an item is requested, it will be shown in waiting position instead of printing a hold request slip since it cannot become available through a return action. When the item process status is changed from "in process" to "not in process", the item becomes available.

You can configure the system to remove specific process statuses automatically when the item is circulated by its barcode. This is useful if the process status has been placed to signify that the item is lost, missing or otherwise removed from the library's stack. The item being circulated by its barcode should therefore trigger removing such a process status.

The process statuses that will be removed are set in the `tab100` variable `LOST-PROC-STATUS`. Any of the process statuses that are listed in this variable will be removed if one of the following applies to the item:

- Item is loaned or returned.
- Item information is changed in the Circulation GUI.
- Item is requested by using its barcode.
- Item is renewed by its barcode.

The `circ.ini` flag `NotifyProcessStatus` (in the [General] section) controls whether or not the staff will be notified of the process status removal.

## 26. Overriding a Block for Loans and Renewals

The override mechanism for Loans and Renewals works according to the following mechanism:

In order to be able to override the error messages you must have the following properties defined (in order of priority):

1. `Z305-OVER-PERMISSION` (patron permission).
2. `USER PERMISSION` to do an override (`user_functions`).
3. A `USER LEVEL` high enough that covers all your error messages (this value is a field in the record `Z66`, `Z66-USER-CIRC-LEVEL`).

This field can be updated through the Staff Privileges function available from all GUI modules. To access the Staff Privileges functionality right-click the key icon on the Operations bar (at the bottom right of the screen) and select Staff Privileges.

In the table `check_circ_override`, you can set the level a staff user has to have in order to be able to override a specific error message.

If one or more of the above mentioned properties is missing, then the Override button will be disabled.

## 27. Client Setup (circ.ini)

The `circ.ini` file defines settings for the Circulation client. This chapter presents and explains the following sections of the `circ.ini` file:

- BookingList on page 83
- ChangeDueDates on page 83
- CircAdminTree on page 84
- CourseReading on page 84
- ErrorAction on page 84
- FastCirc on page 85
- [FilterProfileByLibrary] on page 85
- General on page 83
- Hold on page 85
- HoldFilledList on page 85
- HoldList on page 86
- ItemHoldList on page 87
- ItemList on page 87
- ItemBookingList on page 87
- ItemSchedList on page 88
- Loan on page 88
- LoanList on page 88
- Lost on page 89
- MagneticMedia966 on page 90
- OfflineCirc on page 90
- Patron on page 91
- Payment on page 91
- ReadingRoom on page 92
- RemoteRegistration on page 92
- Return on page 92
- [ReturnSession] on page 92
- ReturnHold on page 93
- RfidMedia on page 93
- StationReport on page 94
- TitleReqList on page 94
- UserList on page 94

Explanations of other setting definitions, relating to more than one module, can be found in the General System Librarian chapter of the ALEPH User Guide.

---

## [General]

DatesDefaultSubLibrary=WID

UpdateDatesDefaultSubLibrary=Y

NotifyProcessStatus=

### **DatesDefaultSubLibrary**

Determines the default sublibrary that displays when the Circulation GUI's Active Due Dates node in the Loan tab is accessed.

### **UpdateDatesDefaultSubLibrary**

Determines whether or not a change in the displayed sublibrary the Circulation GUI's Active Due Dates node in the Loan tab is accessed is saved after the GUI is closed. Setting this variable to N causes the sublibrary defined in the DatesDefaultSubLibrary variable to always be used when the GUI is opened.

### **NotifyProcessStatus**

This variable defines whether or not the user will be notified when a process status is automatically removed from an item. This may happen if an item that is being circulated by its barcode has a process status that is defined in the tab100 variable LOST-PROC-STATUS for removal.

---

## [BookingList]

WantDeleteLetter=Y

WantDeleteLetterNote=Y

### **WantDeleteLetter=Y**

Determines whether or not the system sends a letter to the patron if a booking request is deleted from his Booking List.

### **WantDeleteLetterNote=Y**

Determines whether or not the system allows the operator to add a message to the letter sent to the patron, specifying the reason for deleting the booking request. This is only operative if the parameter is set to `WantDeleteLetter=Y`.

This parameter is relevant for booking requests deleted from the patron's Booking List.

---

## [ChangeDueDates]

[ChangeDueDates]

DoCheck=N

Enables the display of the window informing how many loans match the range of dates before changing their due dates.

When a staff user is using the "change due date of current loans" functionality, setting DoCheck to Y, will show a prompt telling the patron how many loans were found and how many are going to be changed.

---

## **[CircAdminTree]**

DefaultTree=B

This variable sets the first branch that is opened when the Admin tab is clicked in GUI-Circulation.

The possible values are:

B (booking), C (list of courses), J (file list), A (batch log), Q (batch queue), D (print daemon).

The default value is B (Booking).

---

## **[CourseReading]**

DisplayNotesDialog=Y

In GUI-Circulation-Course Reading: Adding doc record to course by activating the "Search" button. This variable set the option to automatically display the "Edit Notes" form after choosing a record.

Y-The "Edit Notes" form is pop-ups after selecting a record.

N- The "Edit Notes" form is not displayed.

---

## **[ErrorAction]**

```
[ErrorAction]
NoUser=N
NoBorrower=N
LoanError=N
ReturnError=N
UserError=N
ItemError=N
ClaimReturn=N
LostReturn=N
LoanDenied=N
ReturnDenied=N
ItemTransfer=N
ItemRequested=N
LoanSuccess=N
ReturnSuccess=N
OnHold=N
UserVerification=N
RemoteReturn=N
ReturnIllLend=N
```

The options for every sound are:

- SoundName=N – No sound.

- SoundName=Y, S, System sound name - This setting uses a system sound for the sound name. The list of available system sounds is listed below.
- SoundName=Y, F, Sound file name - This setting uses a sound file for the sound name. The sound file should be placed in the Alephcom\Sound directory.

For example:

```
NoBorrower=N
NoBorrower=Y, S, Beep
NoBorrower=Y, F, RINGOUT.WAV
```

The available sounds at the moment are Windows standard sounds:

- QUESTION
- EXCLAMATION
- OK
- HAND
- BEEP

---

### [FastCirc]

```
[FastCirc]
StartMode=R
```

StartMode sets the default mode for Fast Circulation. If set to "R", the Fast Circulation form is opened with the Return radio button selected. If set to "L", it is opened with the Loan radio button selected.

---

### [FilterProfileByLibrary]

This flag determines whether or not profiles that belong to other libraries are displayed when the profile list is displayed. This is relevant to the Global Patron Information form profiles drop down list.

---

### [Hold]

```
[Hold]
CreateTypeTitle=N
```

#### **CreateTypeTitle**

This variable defines whether or not a hold request form will be loaded by default with the 'Title Request' check box selected.

---

### [HoldFilledList]

```
[HoldFilledList]
AutoClose=Y
AutoSelect=Y, 2.5
AutoSelectMode=M
WantDeleteLetter=Y
WantDeleteLetterNote=Y
```

This section provides the option to automatically select and close the Hold List window when using "Print Letter - Hold Request filled", when no button is clicked and there is only one hold on the list. The system will automatically select the patron from the list, print a letter for that patron and close the window in 1.5 seconds.

**AutoClose=Y**

If you want the window to close automatically after a selection has been made, use Y. If you do not want the window to close automatically, use N.

**AutoSelect=Y**

If you want the system to automatically select the entry in the List of Hold Requests, use Y. Then set the number of seconds that you want the system to wait before selecting the entry (for example, 2.5 seconds).

If you want to be able to select the entry by yourself, without a time limit, use N.

**AutoSelectMode=M**

This parameter controls the auto select of the first entry in the Hold Filled List. If the switch is set to S (ingle) the system will automatically print the letter if there is a single entry in the list, if there is more than one hold on the list the selection must list and no button is clicked. If there is more than one hold on the list the selection must be performed manually. If the switch is set to M (ulti) the system will automatically print the first entry in any case, whether there is only one or more entries in the list.

**WantDeleteLetter=Y**

Determines when a hold request is deleted, whether to send a letter to the patron notifying him that his request was deleted from the "Hold filled List".

**WantDeleteLetterNote=Y**

Determines whether or not the system allows the operator to add a message to the letter sent to the patron, specifying the reason for deleting the hold request. This is only operative if the parameter is set to WantDeleteLetter=Y.

---

**[HoldList]**

```
[HoldList]
WantDeleteLetter=Y
WantDeleteLetterNote=Y
```

**WantDeleteLetter=Y**

Determines whether the system should send a letter to the patron if a hold request is deleted from his Hold List.

**WantDeleteLetterNote=Y**

Determines whether or not the system allows the operator to add a message to the letter sent to the patron, specifying the reason for deleting the hold request. This is only operative if the parameter is set to WantDeleteLetter=Y.

This parameter is relevant for hold requests deleted from the Patron's Hold List.

## ItemHoldList

[ItemHoldList]  
WantDeleteLetter=Y  
WantDeleteLetterNote=Y

### WantDeleteLetter=Y

Determines whether the system should send a letter to the patron if a hold request is deleted from his Hold List.

### WantDeleteLetterNote=Y

Determines whether or not the system allows the operator to add a message to the letter sent to the patron, specifying the reason for deleting the hold request. This is only operative if the parameter is set to WantDeleteLetter=Y.

### Note

These are the same definitions as those of [HoldList], the only difference being that the definitions in ItemHoldList concern the item list, whereas the definitions of HoldList concern the borrower list.

---

## [ItemList]

[ItemList]  
FilterType=0  
LoanSortType=LOAN-1  
ItemSortType=ITEM-2

### LoanSortType

When only the items on loan are displayed, this parameter sets the sorting order in which they appear. The options are set in `pc_tab_exp_field.lng`.

### ItemSortType

When in the item list, all the items are displayed, this parameter sets the sorting order in which they appear as default. The options are set in `pc_tab_exp_field.lng`.

The Item list can be sorted according to either of the following Filter types:

- Show all items=0
- Loan filter=1

The ItemList FilterType can also be changed manually using the "Loan filter" checkbox on the Item List in the Circulation client.

---

## [ItemBookingList]

WantDeleteLetter=Y  
WantDeleteLetterNote=Y

### WantDeleteLetter=Y

Determines whether or not the system sends a letter to the patron if a booking request is deleted from the item's Booking List.

### **WantDeleteLetterNote=Y**

Determines whether or not the system allows the operator to add a message to the letter sent to the patron, specifying the reason for deleting the booking request. This is only operative if the parameter is set to `WantDeleteLetter=Y`.

This parameter is relevant for booking requests deleted from the item's Booking List.

---

### **[ItemSchedList]**

```
[ItemSchedList]
WantDeleteLetter=Y
WantDeleteLetterNote=Y
```

**WantDeleteLetter=Y** If you want the system to automatically generate a letter to the patron informing him that his advance booking reservation has been deleted, type *Y*. If you do not want a letter generated, type *N*.

### **WantDeleteLetterNote=Y**

Determines whether or not the system allows the operator to add a message to the letter sent to the patron, specifying the reason for deleting his advance booking reservation. This is only operative if the parameter is set to `WantDeleteLetter=Y`.

---

### **[Loan]**

```
[Loan]
LogSize=300
CheckPatronBooking = Y
```

### **LogSize=300**

The log size of the "Loan History" list. The list is available when the Loan window is open.

### **CheckPatronBooking=Y**

This parameter sets the system behavior if during loaning, a booking of the same patron is found on a like item. Setting this parameter to *Y* will cause the system to warn that there is a booking on a like item. Setting the parameter to *N* will cause the system to treat the request as if it is on the loaned item, without warning the user.

---

### **[LoanList]**

```
[LoanList]
WantReturnWarning=Y
WantBorListOnRenewAll=N
RenewAllBorPresentDefault=Y
DisplayRenewAllCheckWindows=Y
OverrideRenewAllChecks=N
RenewOverrideAllSimilar=Y
```

Note that the variables that affect the Renew All function also affect the Renew Marked function when more than one loan is selected.

### **WantReturnWarning**

This parameter determines whether or not a confirmation will be required when a loan is deleted using the Delete button on the List of Loans.



### **WantBorListOnRenewAll=Y**

If the value is **N**, the system does not automatically print a letter after a "Renew All" procedure. If the value is **Y**, printing of the form bor-list-renew-all is automatically triggered.

### **RenewAllBorPresentDefault=Y**

This parameter defines whether or not the check box next to "Is patron present?" in the pop-up window after performing "Renew All" should be checked by default.

### **DisplayRenewAllCheckWindows OverrideRenewAllChecks**

The following options are controlled by the two above variables:

1. Automatic Override - All  
Automatic renewal of all loans through Renew All even if there are reasons to prevent a renewal. In order for the system to work this way the setup is:

```
DisplayRenewAllCheckWindows=N  
OverrideRenewAllChecks=Y
```

2. Automatic Override - None  
Automatic renewal of only those loans which do not have reasons to prevent a renewal. In order for the system to work this way the setup is:

```
DisplayRenewAllCheckWindows=N  
OverrideRenewAllChecks=N
```

3. Manual Override  
Renewal is according to the manual actions of the operator while performing Renew All. In order for the system to work this way the setup is:

```
DisplayRenewAllCheckWindows=Y  
OverrideRenewAllChecks=N/Y (not critical)
```

### **RenewOverrideAllSimilar=Y**

This switch controls whether or not the same error is ignored if it has previously been overridden for the same item.

- If set to **Y**, the system ignores the same error message if the item is renewed again.
- If set to **N**, the system displays and relates to an error message that was overridden on the occasion of an earlier renew action. The setting refers to both single Renew action and to a Renew All action.

---

**[Lost]**

[Lost]

ManualReplacement=Y

The staff user can manually input the replacement costs for lost material using Manual Replacement, when this parameter is set to Y.

---

### [MagneticMedia966]

Some libraries use theft-detection devices. When an item is loaned, the librarian passes it through a device that demagnetizes the magnetic strip on the spine of the book. This device can erase data that is stored on magnetic media such as CDs or diskettes.

It is possible to provide a warning when magnetic media is loaned. A column in tab25 (material type) is used to mark items as magnetic media. When an item that is defined as magnetic media is loaned, a warning light on the device will light up and the librarian will be able to deactivate the magnetization device

This option is only available with the 3M 966 magnetization/demagnetization device.

[MagneticMedia966]

Port=0

NeedResponse=N

MagnetizeSequence=DDD

DemagnetizeSequence=RRR

MagneticMediaSequence=SSS

When an item is loaned, the librarian passes it through a device that demagnetizes the magnetic strip on the spine of the book. This device can erase data that is stored on magnetic media such as CDs or diskettes.

It is possible to provide a warning when magnetic media is loaned. A column in tab25 (material type) marks items as magnetic media. When an item that is defined as magnetic media is loaned, a warning light on the device will light up and the librarian will be able to deactivate the magnetization device.

#### **Port**

This is the port number to activate the warning for magnetic media.

#### **NeedResponse**

NeedResponse determines whether a response from the 966 magnetization device is necessary or not. If set to **Y**, then the Circulation client waits until the device responds.

#### **MagnetizeSequence=DDD**

#### **DemagnetizeSequence=RRR**

#### **MagneticMediaSequence=SSS**

These three parameters are required by the 966 magnetization device.

---

### [OfflineCirc]

[OfflineCirc]

StartMode=L

BlockSize=5

**StartMode=L**

Determines the default mode of the offline circulation window (loan or return).

**BlockSize=5**

Determines how many transactions per file are sent to the server when the offline circulation is finished.

---

**[Patron]**

```
[Patron]
PictureDirectory=C:\Temp
FastPatronRegistration=Y
```

**PictureDirectory=C:\Temp**

This determines the drive and subdirectory that is opened by default when you are adding or updating a patron's picture from the GUI.

**FastPatronRegistration=N**

This flag determines which of the New Patron Registration forms will be displayed when the New Patron option is activated. If this flag is set to N, the Global Patron Information form will be displayed. If the flag is set to Y, the Patron Registration form will be displayed.

---

**[Payment]**

```
[Payment]
CashNoReceipt=1
AllowWaiveOnTransferred=N
AllowPayOnTransferred=N
PaymentMode=00
```

**CashNoReceipt=1**

Number of copies of payment receipts (up to 9) to print. If you do not want any printed, type zero ("0").

The actual printer that will be used is defined in the PRINT.INI file, with the function name PayLetter or LineLetter. If the Pay Selected option is used, then the LineLetter entry is used. If the Pay Sum option is used, then the PayLetter entry is used.

**AllowWaiveOnTransferred=N**

This switch determines whether or not the system allows the waiving of cash transactions transferred to AR (Accounts Receivable).

**AllowPayOnTransferred=N**

This switch determines whether or not the system allows the payment of cash transactions transferred to AR.

**PaymentMode=00**

This variable sets the default payment mode that is used when the Pay Sum or Pay Selected buttons are clicked.

## [ReadingRoom]

AutoMoveItem=Y

Determines whether the detected item in the patron's reading room list is automatically changed from 'On shelf' to 'Reading Room' and vice versa (the opposite of its current status).

---

## [RemoteRegistration]

UseGlobalPassword=N

This section determines how the system will operate regarding the operator's user name and password when using the Remote Registration option.

When set to N, the system does not perform a preliminary check and immediately shows the ALEPH Temporary Password window upon choosing the Remote Registration option.

When set to Y, the system first tries to check the current operator's password in the remote library. The ALEPH Temporary Password window will only be shown if there is no such user name and password in the remote library.

---

## [Return]

[Return]

LogSize=300

DateOverrideActive=5

ReturnLoadPatron=N

### **LogSize=300**

The log size of the "Return History" list. The list is available when the Return window is open.

### **DateOverrideActive=5**

Defines after how many minutes of the station being inactive, there will be a message informing the librarian that the Date Override option is still in use.

### **ReturnLoadPatron=N**

This variable enables the option of loading patron information after the return action is completed. Default: N.

Y – After the return action is completed, the GUI loads the patron context. Users may switch to Patron tab to view the patron information.

N – Return action does not load patron context.

---

## [ReturnSession]

RemoteStoreMessage=Y

This section gives the option set behavior of the return action.

### **RemoteStoreMessage=Y**

If you want to display the “item must be returned to remote storage facility” message, use Y or leave the entry unspecified. If you do not want to get this message, use N.

---

## [ReturnHold]

```
[ReturnHold]
AutoClose=Y
AutoSelect=Y,0.1
AutoSelectMode=M
WantDeleteLetter=Y
WantDeleteLetterNote=Y
```

This section gives the option to automatically select and close the Hold List window when the item is returned and there is only one hold on the list. The system will automatically select the patron from the list, print a letter for that patron and close the window.

### **AutoClose=Y**

If you want the window to close automatically after a selection has been made, use Y. If you do not want the window to close automatically, use N.

### **AutoSelect=Y**

If you want the system to automatically select the entry in the List of Hold Requests, use Y. Then set the number of seconds that you want the system to wait before selecting the entry (for example, 0.1 seconds).

If you want to be able to select the entry by yourself, without a time limit, use N.

### **AutoSelectMode=M**

This parameter controls the auto select of the first entry in the Return Hold List. If the switch is set to S (ingle) the system will automatically print the letter if there is a single entry in the list, if there is more than one hold on the list the selection must be performed manually. If the switch is set to M (ulti) the system will automatically print the first entry in any case, whether there is only one or more entries in the list.

### **WantDeleteLetter=Y**

Determines when a hold request is deleted, whether to send a letter to the patron notifying him that his request was deleted from the "Returned item hold list".

### **WantDeleteLetterNote=Y**

Determines whether or not the system allows the operator to add a message to the letter sent to the patron, specifying the reason for deleting the hold request. This is only operative if the parameter is set to WantDeleteLetter=Y.

---

## [RfidMedia]

```
[RfidMedia]
ActivateReader=Y
SuccessMessage=Y
```

The [RfidMedia] section is required when library items are RFID-tagged. For more information on using RFID equipment, see [Aleph Support for RFID](#) on page 176.

This section include information on the following RFID products: Nedap, 3M, and Bibilichip (Bibliotheca).

#### **ActivateReader=Y**

This variable determines whether or not the RFID Reader is updated when the relevant GUI actions are triggered.

#### **SuccessMessage=Y**

This variable determines whether or not a message indicating success is issued when the RFID Reader update action succeeds.

---

### **[StationReport]**

```
[StationReport]
FromDate=19990518
FromHour=1700
ByIdIp=ID
BySubLibraryTarget=S
```

When running the Payment Report from the Circulation client, the librarian can choose to save the date and time of the last report, and later use it as the beginning time and date of the next report.

#### **FromDate**

The last date the Payment Report was run.

#### **FromHour**

The last hour the Payment Report was run.

#### **ByIdIp**

This field sets the default of the "Create Report Using" checkbox in the Payment Report window.

#### **BySubLibraryTarget**

This field sets the default of the "Sort Report By" checkbox in the Payment Report window.

---

### **[TitleReqList]**

```
WantDeleteLetter=Y
WantDeleteLetterNote=Y
WantDeleteLetter=Y
```

Determines if the system sends a letter to the patron if a title request is deleted from his Title Request List.

#### **WantDeleteLetterNote=Y**

Determines whether or not the system allows the operator to add a message to the letter sent to the patron, specifying the reason for deleting the title hold request. This is only operative if the parameter is set to WantDeleteLetter=Y.

This parameter is relevant for title hold requests deleted from the Patron's Title Hold List.

---

### **[UserList]**

```
[UserList]
BorrowersOnly=N
FilterType=0
```

### **BorrowersOnly=N**

Defines if the "Display Local Patron Only" check box in the Patron List is selected by default:

- If set to **Y**, only patrons with at least one local record are displayed. Whether or not patrons whose only local record is ALEPH are displayed depends on the setup of the `user_list_aleph_local` parameter in `pc_server_defaults`.
- If set to **N**, all patrons are displayed.

### **FilterType=0**

The Patron List can be sorted according to one of the following parameters: Patron ID, Patron Name or Patron Barcode. This parameter sets the default value for the sorting of the Patron List.

- `FilterType=1` sorts list by Patron ID
- `FilterType=0` sorts list by Patron Name
- `FilterType=2` sorts list by Patron Barcode

The sort of the Patron List can be changed manually using the "Sort by" option in the Patron List in the Circulation client.

## **28. Circulation Values of `pc_server_defaults`**

`pc_server_defaults` is an ALEPH configuration file located under `$alephe_root`. This configuration file defines the default values for the PC server.

Following are the relevant entries for GUI-Circulation:

**1.28.1.1. setenv borname style u 01**

**1.28.1.2. setenv borname style s 02**

**1.28.1.3. setenv borname style f 03**

Style for patron's name:

The letters denote the interface:

- U - Patron input
- S - Screen display
- F - Form

The numbers denote format

- 01 - name, title

- 02 - name
- 03 - title name

#### **1.28.1.4. setenv overdue delinq period**

Sets the threshold value for global block (Code 70). Code 70 is registered in the block field of the global patron record. It goes into effect for a patron who returns an item more than a certain number of days late. This happens automatically, so either comment out or remove this line if not required.

Possible values: 00-99

- 00 - code 70 is never attributed
- 01-99 - code 70 is attributed if an item is returned after being overdue for *nn* number of days.

#### **1.28.1.5. setenv bor list address**

Defines which address lines display.

Possible values:

- 00 - name only
- 02,03 - displays patron name together with the second and third lines of the address (the first line is the patron name, copied automatically from the name field)

#### **1.28.1.6. setenv user list aleph local**

Defines whether the ADM patron is to be considered a Local Patron or not.

Possible values:

- Y – ADM level is considered a local patron.
- N – ADM level is not considered a local patron.

If set to N, patrons whose only Z305 local patron record is the ADM level record are not displayed in the Patron List if the checkbox "Display Local Patron Only" is selected. Therefore it is recommended to set `user_list_aleph_local` to Y.

#### **1.28.1.7. setenv circ user z37 sort routine**

Defines the sort of the patron's hold list.

Possible values:

- 00- "standard" sort using priority, request date, open date & hour
- 01 - sort using sublibrary, item-status, collection, open date & hour
- 02 - sort using sublibrary, item-status, collection, status, open date and hour



- 04 - sort using group ID and sequence, priority, request interest date and request date

If the standard sort is sufficient then this line can be commented out.

#### **1.28.1.8. setenv circ user z37 sort order**

Defines the sorting of the patron's Hold Request list.

Possible values:

- A - Ascending
- D - Descending

If the standard sort is sufficient then this line can be commented out.

#### **1.28.1.9. setenv pc z37 date to.**

Syntax is <x><nnn>, where the first position is the time unit code, [M]onths, [D]ays or [Y]ears, and the second is the numeric value. For example: M006 for six months. The variable determines the default period between the placing of a hold request from the GUI and the end of the period of interest. If this variable is not defined, or is defined incorrectly, the default "date to" will be three months.

#### **1.28.1.10. setenv circ user z38 sort routine**

Defines the sort of the patron's photocopy request list.

Possible values:

- 00- "standard" sort using priority, request date, open date & hour
- 01 - sort using sublibrary, item-status, collection, open date & hour
- 02 - sort using sublibrary, item-status, collection, status, open date & hour

If the standard sort is sufficient then this line can be commented out.

#### **1.28.1.11. setenv circ user z38 sort order**

Defines the sorting of the patron's photocopy request list.

Possible values:

- A - Ascending
- D - Descending

If the standard sort is sufficient then this line can be commented out.

#### **1.28.1.12. setenv circ cataloger request date**

Defines the number of days after the creation of a quick catalog record in CIRC that a hold request for the patron defined as CATALOGER is created.

Possible values: 000-999

#### **1.28.1.13. setenv default lock period**

Locked circulation records are automatically unlocked after a period defined in this section

Possible values: 000-999 - The period is defined in seconds.

**Note 1:** By default (if not otherwise defined ), the variable has been set to lock records for 300 seconds.

**Note 2:** The value entered in `setenv default_lock_period` is also shared by Items, Acquisitions and ILL records.

#### **1.28.1.14. setenv default recall type**

This variable sets the default value for Recall Type field in the Hold Request screen in the Circulation module. Possible values:

- 01 = regular recall
- 02 = rush recall
- 03 = no recall

If no value is defined, the system defaults to "03" (= No Recall).

#### **1.28.1.15. setenv display lines patron list**

This variable defines the number of lines that are loaded in the Patron List window when scrolling up and down. It can be used by the library to speed up the patron list display.

Possible values: 10-99. If no value is defined, the system defaults to 20.

If the value is defined above 99, the system sets to 99.

If the value is defined under 10, the system sets to 10.

## **29. Circulation Values of `aleph_start`**

`aleph_start` is an ALEPH configuration file located under `$alephe_root`. This configuration file defines default values when starting the system. Following are the relevant entries for GUI-Circulation:

`setenv fine_factor_fix`

You can define a multiplication factor for the fine rate set in `tab16`, column 11. This is useful for countries whose currencies are written in the thousands (for example, 10,000 lira).

Sensible values: 10, 100, 1000

setenv fine\_rounding

This rounds a fine up or down to get rid of the decimal points. Rounds up when the sum after the decimal point is more than 0.50 and rounds down when the sum is lower than 0.50.

Possible values:

- Y - rounds sums up or down
- N - leaves decimal values

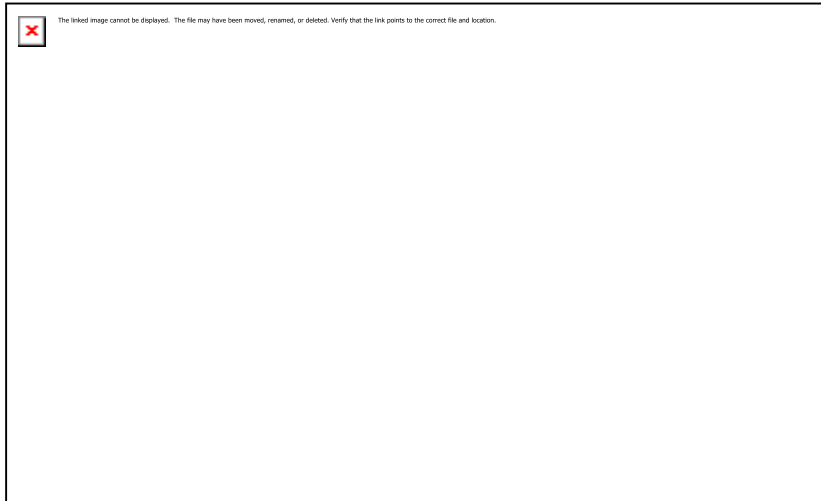
### 30. Change Item Information Display

You can change several parts of an item's information from the Change Item Information utility. You access the Change Item Information utility as follows:

1. From the main menu, click Items/Change Item Information. The following window opens:



2. Enter your changes and click OK. A second window (Change Item Information - Step 2) opens that displays the changes you want to effect.



The text in the first column ("Field") of this window is controlled by the table: `$aleph_root/error_lng/circ_item_change`. The order of the lines is hardcoded in order to match the order of the first window (Change Item Information - Step 1).

**Note:**

If you change an item status to an advance booking item status, advance booking slots are automatically created for two weeks. In order to open more slots as defined in `www_server.conf` and `pc_item_schedule`, run `p-cir-60` after implementing the changes to the item status.

If you change an item status from an advance booking item status to another type of item status, the advance booking schedule of the item is automatically deleted.

## 31. Tables

### 31.1. Library Tables

1. **cash\_09\_translate**

The table `cash_09_translate` translates sublibrary codes into campus or department codes for cash export reporting purposes in conjunction with the service Cash Export Report (cash-09).

2. **check\_circ\_override**

The table defines the minimum password level that is required in order to be able to override circulation transactions that have been trapped.

3. **form\_sub\_library\_address**

`form_sub_library_address` table defines address types for Acquisitions, ILL & Circulation forms. `form_sub_library_address` works in conjunction with column 2 (address type) of `tab_sub_library_address.lng` (alephe table).

4. **pc\_tab\_circ\_fast\_cat.lng**  
pc\_tab\_circ\_fast\_cat.lng defines fields for the quick cataloging option, Catalog Item function, in the Circulation GUI module. The table in the BIB library defines the bibliographic fields. The table in the ADM library defines the administrative fields.
5. **pc\_tab\_fast\_circ**  
pc\_tab\_fast\_circ defines the parameters for fast circulation. It defines which system checks should be activated, and whether the trap can be overridden. Fast circulation will be used most often by distant branches with poor communication lines, or by book buses that are connected to the main library via modem.
6. **tab100**  
tab100 is the central configuration table for system-level, server-level and library-level variables. See tab100-related entries in Circulation on page 111 and tab100's header.
7. **tab14**  
tab14 allows the library to indicate the time it takes for a returned item to get back on the shelf. The definition can be on the level of the sublibrary, collection and item status. When an item is returned, the due date will display "reshelving" (line 0357 in \$aleph\_root/error\_lng/www-heading and line 8007 in \$aleph\_root/error\_lng/circ\_status\_holding) for the time defined in tab14.
8. **tab15.lng**  
tab15.lng defines the item statuses and various parameters connected to these statuses.
9. **tab16**  
tab16 defines the rules for computing due dates and fine rates for each combination of patron/item status. The table also defines limits placed on the number of hold requests and the maximum number of loans a patron with a certain status can have of items with a specific status or a global limit placed on a patron status not connected to a specific item status. Parameters for recalls are also held in this table. Note that the item process status is not taken into consideration when creating due dates and due hours (columns 6, 9, 16 and 18) but is taken into consideration for all other columns.

**Special Note:** When a change is made to tab16 that affects due dates - in order for the changes to take immediate effect - the due dates table (Z301) should be dropped and recreated. Use either the service Rebuild Due Dates (cir-01) or UTIL A/17/1, Drop and Create Table and Index, to accomplish this. Note however, that if the table is not dropped and recreated via the service Rebuild Due Dates (cir-01) or UTIL A/17/1 Drop and Create Table and Index, the changes automatically take effect the next day.

#### 10. **tab17**

`tab17` defines the open days and hours of a library/sublibrary. It enables the system librarian to set the due date to the next open date and to skip "closed" days when computing fines, depending on the `tab16` column 14 (fine method) setup.

#### 11. **tab18.lng**

`tab18.lng` defines the function against which Cash Control will be activated and the Cash amount. It is sensitive to sublibrary/patron status.

#### 12. **tab24**

`tab24` is used for Remote Storage. It defines the maximum time required for delivery of items from the RS to the pickup sublibrary and the set times that items sent from the Remote Storage arrive at the pickup sublibrary.

#### 13. **tab25.lng**

`tab25.lng` defines the list of possible values for Z30-MATERIAL (item material type). "ISSUE" has special functionality.

#### 14. **tab27**

`tab27` defines if an item that was requested by a patron through a hold, a booking or an ILL request is kept on the "hold shelf", is sent to a reading room, or is immediately loaned to the patron when it becomes available.

#### 15. **tab30**

`tab30` enables the library to define defaults for two elements regarding the expiration of patron registration.

1. How many days before the expiration date do you want the system to warn you of approaching expiration (in CIRC). If a patron borrows an item within the defined period, the system gives a warning "expiration date approaching" together with the expiration date. The librarian can then make sure that the due date of the item will not fall beyond the expiration date.
2. The default renewal period. This can be seen online when the renew button (on the Update Local Patrons screen) is activated.

#### 16. **tab31**

`tab31` defines default privileges for the patron based on the patron status. When a new patron is created online the system will use these defaults for creating patron privileges and other definitions. The status must be defined here in order to be valid in the system.

## 17. **tab\_z31\_sort**

The table defines the sort procedures and sort orders (ascending or descending) for lists of cash records. The sort procedures will be displayed in a drop-down list that is defined in the `pc_tab_exp_field.lng` table under the menu CASH-SORT-TYPE.

## 18. **tab32**

`tab32` defines overdue letter intervals for patron/item statuses.

## 19. **tab34**

`tab34` is an optional table that computes the charges that are added to the patron's cash record in case an item is changed to lost through the LOST function in the Circulation module, or as a result of Overdue and lost letter. The charges are defined for each item-patron combination.

## 20. **tab37**

`tab37` defines the configuration for hold requests. This configuration includes:

- Target library for hold request
- Item status
- Patron status
- Pickup library

If the pickup location is not defined the request will not be allowed.

## 21. **tab37\_booking\_pickup**

This table defines the pickup locations allowed for booking requests. Which locations are allowed depend on item status, item process status, patron status, material type and sublibrary of item. The list of locations are valid sublibraries in `tab_sub_library`.

## 22. **tab37\_booking\_delivery**

This table defines the delivery locations allowed for booking requests. Which locations are allowed depends on item status, item process status, patron status, material type, and the sublibrary of item. The list of locations is made up of valid locations in `tab_delivery_locations.lng`. Note that a line with hashes in columns 1-5 defines the list of delivery locations that will be shown wherever a drop-down list of delivery locations is shown in the GUI.

### 23. **tab37\_campus\_filter**

`tab37_campus_filter` is used in conjunction with the service Hold Requests Router (cir-24). This table allows you to remove hold requests that have certain characteristics from being considered by the Hold Requests Router (cir-24).

### 24. **tab37\_campus\_preferred**

`tab37_campus_preferred` is used in conjunction with the service Hold Requests Router (cir-24). This table allows you to determine the order of preference for supplying items that have been requested to a certain pickup location.

### 25. **tab38**

`tab38` defines the configuration for photocopy requests. This configuration includes:

- Target library for photocopy request
- Item status
- Patron status
- Pickup library
- Delivery method

If the pickup location is not defined the request will not be allowed.

### 26. **tab39**

`tab39` supports the configuration of the daemon for handling hold requests (ue\_06). This includes the capability to print requests on different printers.

### 27. **tab40.lng**

`tab40` defines collection codes and names. It defines the expansion of the collection code as entered in the Z30-COLLECTION FIELD in items, to the expanded form to be displayed in the Web OPAC.

### 28. **tab41**

`tab41` supports the configuration of the daemon for handling photocopy requests (ue\_06). This includes printing requests on different printers.

### 29. **tab43**

`tab43` defines the setup for advance booking of short loans. It is a table for defining advance booking parameters. `Tab43` includes definitions for the start day and hour, as well as end day and hour. The table



enables you to define "closed" times, independent of `tab17` (library hours).

**30. `tab44`**

`tab44` defines how long requested items will be kept on the hold shelf.

**31. `tab_attr_sub_library`**

`tab_attr_sub_library` defines (by IP address or station ID) circulation loan/return authorizations. In other words, which sublibraries will accept loans/returns of other sublibraries and which will not.

**32. `tab_block_circ`**

This table is the default table used to determine the alternative block values for checks `9_a`, `9_b`, `10_a` and `10_b` in `tab_check_circ`. `9_a` and `10_a` are for checks at the ADM level, `9_b` and `10_b` are for checks at the sublibrary level.

**33. `tab_booking`**

This table defines the following times, required for booking requests: Head time, tail time, release time, delete interval, future booking limit.

**34. `tab_bor_address`**

`tab_bor_address` provides an option for defining the validity period of a patron address.

**35. `tab_bor_id.lng`**

`tab_bor_id` defines all system-wide behavior relating to the Z308 (patron's ID) records. In this table, you can define the keys that can be used to access patron records in the GUI applications and in the Web OPAC. You can also define the additional IDs that can be updated in the GUI, their verification codes, and whether the ID is displayable. The table is managed from the `tab` directory of the user library.

**36. `tab_check_circ`**

`tab_check_circ` defines which check routines to run when activating loan/renewal.

**37. `tab_circ_log.lng`**

`tab_circ_log.lng` is used to configure which events will be logged by the circulation logger, and which events can be manually added to the logger. Note that the texts of the logged events are set in `$aleph_root/error_lng/circ_logger`.

**38. `tab_delinq.lng`**

`tab_delinq.lng` allows the library to define which circulation privileges will be blocked and/or restricted for a defined block code (in the Global Patron Information form or the Local Patron Information form).

### 39. **tab\_delivery\_locations**

This table is where the delivery locations that are allowed by this ADM are defined. The table lists the delivery locations and their addresses. These delivery locations can be defined in `tab37_booking_delivery` as delivery locations of booking requests.

### 40. **tab\_events.lng**

`tab_events.lng` of the administrative library defines which transactions will write a record to the Z35 events Oracle table. The transactions relate to Circulation (loans, returns, holds, photocopy requests). The event type identifier is written in Z35-EVENT-TYPE of the Z35 table. The `tab_events.lng` table of the bibliographic library also has Web OPAC-related event types that write records to the Z69 Oracle table (types 20-35) and to the Z35 oracle table (types 10, 11, 12).

### 41. **tab\_fast\_patron\_register**

This table is found in the `data_tab` directory of USR00. The table defines the default values that will be used for creating the following patron records fields, when the Fast Patron Registration option is used :

Z303-ILL-TOTAL-LIMIT

Z303-ILL-ACTIVE-LIMIT

Z303-EXPORT-CONSENT

Z303-SEND-ALL-LETTERS

Z304-DATE-TO (for address type "01")

Z305-BOR-TYPE

Z303-PLIF-MODIFICATION

This table contains lines in the format "FIELD=VALUE", for example:

```
Z303-ILL-TOTAL-LIMIT=0555
Z303-ILL-ACTIVE-LIMIT=0444
Z303-EXPORT-CONSENT=N
Z303-SEND-ALL-LETTERS=N
Z304-DATE-TO=00000002Y
Z305-BOR-TYPE=DR
Z303-PLIF-MODIFICATION = A B D E 1
```

The value of Z304-DATE-TO can be in one of the following formats:

If the value of the Z304-DATE-TO field in the table is eight digits only (for example Z304-DATE-TO=20041231), this value will

be translated to be the 'valid to' value of the new patron's address. In this case it is a simple date of the form `yyyymmdd`.

If the value of the `Z304-DATE-TO` field in the table is eight digits suffixed by an upper case letter, the value will be translated to be an offset from the current date. If the suffix is `Y` the offset will be in years, if it is `M` the offset will be in months, and if it is `D` the offset will be in days.

For example:

`Z304-DATE-TO=00000002Y` means that 2 years will be added to the current date and stored in the field `Z304-DATE-TO` of the newly created patron.

The `Z304-ADDRESS-TYPE` sets the type of address that will be created. Possible values are `01,02,03` etc.

The `Z303-PLIF-MODIFICATION` field sets which fields should be protected when updating borrower records using the `PLIF - Patron Loader (p-file-20)` service. If you want all fields to be unprotected, leave the `z303-PLIF_MODIFICATION=` line blank.

The field can contain a list of codes delimited by a space. The codes are:

- `A` = Do not modify the borrower's address records (`Z304`).
- `B` = Do not modify the borrower's status.
- `D` = Do not modify the borrower's expiry date.
- `E` = Do not modify the borrower's e-mail address (`Z304-EMAIL-ADDRESS`) in the address record (`Z304`).
- `1` = Do not modify all borrower's records (`Z303`, `Z304`, `Z305` and `Z308`).

#### 42. `tab_hold_request`

`tab_hold_request` is used to define which checks should be performed by the system when a hold request is placed. Definitions in the table determine:

- If the hold request link should be displayed in the WWW OPAC ("PRE" checks).
- Which checks should be performed when the request is actually placed ("POST").

- Which checks should be performed in the circulation client (CIRC).
- In which cases information should be displayed when a request is initiated in the WWW OPAC (INFO).

#### 43. **tab\_hold\_request\_form**

`tab_hold_request_form` sets the option to configure the system to use different hold request forms when the patron places a request through the Web OPAC.

When a request is placed, the system will look for a matching line in the table. The correct line will be selected according to one of the available parameters in this table: the item's sublibrary, item status, item process status, patron status and item's availability that is determined according to the `AVAILABILITY-ROUTINE` variable in `tab100`.

If no match is found, or `tab_hold_request_form` does not exist, the system will display the hold request forms without the suffix.

#### 44. **tab\_item\_history.lng**

Location of the table: `tab` directory of the ADM library. Purpose of the table: Item History trigger and description. This table defines in which cases a field change or an action will cause an item history record to be written. This information is accessible in the History node of the Items tab in the Cataloging module. In addition, the table is also used for setting the description of the action. This description is used for display in the item history node.

#### 45. **tab\_label.lng**

`tab_label.lng` defines the prefixes that will be printed on the spine label.

#### 46. **tab\_late\_return**

`tab_late_return` defines the periods and sums for late return fines in conjunction with fine method F in `tab16`, column 14.

#### 47. **tab\_map\_privileges**

This table defines the type of global ALEPH Z305 record that is created when the patron locally registers in a sublibrary. This table will be functional only in cases where column 22 of `tab31` is configured to Y, meaning that an ALEPH record is to be created.

#### 48. **tab\_photo\_request**

`tab_photo_request` is used to define which checks should be performed by the system when a photocopy request is placed. It is similar in functionality to `tab_hold_request`. In some cases, the

checks on the photocopy requests for the Web OPAC determine whether the "photo" link appears on the item line.

#### 49. **tab\_roster**

This table determines how the roster of potential suppliers will be created when a title level hold request is submitted. Each pickup location is assigned groups of potential suppliers that can fulfill the request. The order in which the potential suppliers are listed in this table is the order in which they will be created in the title request roster of the potential suppliers. This table can be defined either in the `data_tab` of the pickup location ADM library or in `alephe_tab`.

#### 50. **tab\_service\_hour**

This table defines the service hours for hold and photocopy requests. The request submission time (day+hour) is checked against the pickup location service hours that are set in `tab_service_hour`. It lists service hours for days of the week (00-Sun thru 06-Sat) or a specific date (YYYYMMDD).

Note that the system applies `tab_service_hour` only when `check_hold_request_sh` and `check_photo_request_sh` are set in `tab_hold_request` and `tab_photo_request` respectively. Only days+hours defined in this table are considered service hours. Days+hours that are not set are labeled as non-service hours. If the `tab_service_hour` table is empty (with no lines set) or does not exist, request services are off (there are no available service hours).

If a request is submitted when the pickup location is out-of-service, the request is not accepted and a message is displayed indicating that the pickup location is currently out of service and that the request cannot be submitted. For setup and additional information, see [Request Service Hours Checks \(tab\\_service\\_hour\)](#) on page 50.

#### 51. **tab\_sub\_library\_address.lng**

`tab_sub_library_address.lng` defines addresses of sublibraries for printouts (for example, orders to vendors, overdue letters to patrons, and so on.)

Note: This table can be defined either in the `tab` directory of `alephe` library or in the `tab` directory of each ADM library.

#### 52. **tab\_ue\_pickups**

`tab_ue_pickups` lists the photocopy pickup locations that are handled by the requests daemon `UE_06`. Photocopy pickup locations that are not listed in the table are skipped by the requests daemon.

#### 53. **tab\_z30\_sort**

`tab_z30_sort` defines sort options for items. Different sort routines can be used in different parts of the system.

#### 54. **tab\_z31\_sort**

This table defines the sort procedures and sort orders (ascending or descending) for lists of cash records. The sort procedures are displayed in a drop-down list that is defined in the `pc_tab_exp_field.lng` table under the CASH-SORT-TYPE menu.

#### 55. **tab\_z36\_sort**

This table defines the sort procedures and sort orders (ascending or descending) for lists of loan records in various instances. The sort procedures are displayed in a drop-down list that is defined in the `pc_tab_exp_field.lng` table under the LOAN-SORT-TYPE menu.

#### 56. **tab\_z38\_sort**

This table defines the sort procedures and sort orders (ascending or descending) of the Patron's Photocopy Request list. The sort procedures are displayed in a drop-down list that is defined in the `pc_tab_exp_field.lng` table under the PHOTO-SORT-TYPE menu.

#### 57. **user-cash**

`user-cash` defines the information fields that will be displayed in the Cash pane of the Circulation module.

## 31.2. alephe Tables

### **library\_relation**

`library_relation` defines relation between libraries by library type.

### **tab\_days**

`tab_days` defines of the days of the week in different languages. The table is used in the Web OPAC for the short loan reservations.

### **tab\_ip\_sub\_library**

This table is now called `tab_attr_sub_library`.

### **tab\_month**

`tab_month` defines the names of the months for use in the system in any environment where the name rather than the number of the month will be displayed.

### **tab\_roster**

This table determines how the roster of potential suppliers will be created when a title level hold request is submitted. Each pickup location is assigned groups of potential suppliers that can fulfill the request. The order in which the potential suppliers are listed in this table is the order in which they will be created in the title request roster of the potential suppliers. This table can be defined either in the `data_tab` of the pickup location ADM library or in `alephe_tab`.

### **tab\_sub\_library.lng**

`tab_sub_library.lng` defines the sublibrary codes of all the libraries on the server or in a network of servers.

### **tab\_sub\_library\_address.lng**

`tab_sub_library_address.lng` defines addresses of sublibraries for printouts (for example orders to vendors, overdue letters to patrons, and so on.)

Note: This table can be defined either in the `tab` directory of the alephe library or in the `tab` directory of each ADM library.

## 32. tab100-related entries in Circulation

`tab100` is the central configuration table for system-level, server-level and library-level variables. A few lines of the table are shown below:

```
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
!!!!!!!!!!!!!!
HOLD-REQUEST-ITM-STATUS=Y
HOLD-REQUEST-COLLECTION=Y
CREATE-852-HOL=Y
CREATE-Z36H=Y
```

CREATE-Z37H=Y  
 CREATE-Z30H=Y  
 CHECK-INVOICE-CURRENCY=N  
 X852-ITEM-OVERRIDE=Y  
 HOLD-REQ-PROCESS-STATUS=N  
 RETURN-DURING-LOAN=0  
 CHECK-ORDER-BUDGET=Y  
 CHECK-UNIQUE-NAME-BIRTH=Y  
 CHECK-ORDER-ISBN-ISSN=N  
 CREATE-ITM-FORM-ORDER-M=Y  
 BARCODE-DELETE-SPACES=Y  
 BOR-EXPIRY-DUE-DATE=Y  
 OVERDUE-LETTER-STYLE=Y  
 Z30-PRICE-FROM-ORDER=N  
 OVERDUE-LETTER-NO=1  
 CHECK-BARCODE=Y  
 MARC-TYPE=1  
 FAST-CAT-HOLD-ID=  
 BOOKING-DELIVERY-TIME=D  
 NOTE-ONPICKUP-ONLY

- **ADDITIONAL-ID-TYPE**

This variable is related to fast patron registration. The type of ID that is added in the 'Additional ID' field is set in this variable.

- **AVAILABILITY-ROUTINE**

Determines whether an item is available or is on loan, on hold or has a hold request placed on it.

Possible values are: 1 or 2.

1 = item is considered non-available if it is on loan, on hold, or has been requested (Z37-SOURCE is "C" or "O").

2 = (site specific) item is considered non-available if it is on loan, on hold, or has been requested (Z37-SOURCE "O" only).

The default value is 1.

- **BARCODE-DELETE-SPACES**

Determines whether or not spaces are deleted when the barcode data is transferred to the system.

Possible values are: Y or N.

Y = deletes spaces when barcode data is transferred to the system. This refers to the item barcode only.

The default value is Y.

- **BLOCK-RATIO**

Defines the factor by which the system multiplies the late days for a borrower that has returned an overdue item in order to calculate the number of days on which the patron will be blocked from performing other loans. This is applicable or fine methods 5, 6, 8 and 9.

Possible values are 1-9.

The default value is 1.



- **BOOKING-DELIVERY-TIME**

Defines the delivery time that will be added to a booking request that is required for delivery.

Possible values: The value is a three-digit number that can express minutes, hours, days or weeks, depending on the variable's prefix. The prefix can be 'M' for minutes, 'H' for hours, 'D' for days or 'W' for weeks.

- **BOR-EXPIRY-DUE-DATE**

This variable controls the shortening of due dates according to the patron's expiration date.

Possible values are: Y, N, or H.

Y = sets the due date for loan and renew and the end hold date for hold request to the local patron expiry date if the local patron expiry date is earlier than the computed due date.

H = sets the due date for loan and renew to the local patron expiry date if the local patron expiry date is earlier than the computed due date.

N = the due date is not adjusted.

The default value is N.

- **BOR-STATUS-FOR-RENEWAL**

Defines the patron status when an item is loaned or at the time the loan is renewed.

Possible values are: L or C.

L = when an item is renewed, the patron status at the time of the original loan is used. This is the default if the variable is left blank.

C = when an item is renewed, the patron's current status (at the time of renewal) is used, and the Z36-BOR-STATUS is updated accordingly.

This variable works whether the item is renewed through the Circulation module or through the Web OPAC.

The default value is Y.

- **CHECK-BARCODE**

Determines whether the barcode for the item record is checked or disabled.

Possible values are: Y or N.

N = disables (the default) check for barcode on the item record, thereby allowing item records without barcodes. If the library opts to disable the barcode check for items, the z30\_id1 entry in the file\_list must be adjusted accordingly, since it assumes that bc is an index, and will not allow a non-unique index key ("blank" is an index key).

The default value is Y.

- **CHECK-BOR-DEFAULTS**

Determines whether or not there is a discrepancy in the values set in the local patron record and the values set in tab31 of the patron status.

Possible values are: Y or N.

Y = when updating Z305 (local patron record) in GUI CIRC client, the values set in the record are checked against the values set in tab31 for the patron status. If there is a discrepancy, a warning (which can be overridden) is displayed.

The default value is Y.

- CHECK-UNIQUE-NAME-BIRTH

Determines whether the combination of name and birthdate is unique.

Possible values are: Y or N.

Y = in patron Z303 record the combination of name and birthdate must be unique. Umlaut letters are considered to be identical to their non-umlaut values for this purpose. The non-umlaut value depends on the translation of the umlaut in the Unicode table.

The default value is Y.

- CREATE-Z30H

Determines when to create an item history record when an item is updated or deleted. There can be multiple Z30H records for a single item.

Possible values are: Y or N.

Y= create Z30H (ITEM HISTORY) record when item is updated or deleted, if tab/tab\_item\_history.lng is set for creating a history record. There can be multiple Z30H records for a single item; a Z30H record can be reinstated as the current record.

The default value is Y.

- CREATE-Z36H

Determines whether or not the system stores information about previous loans and displays them in the Item History window which is accessible from the Item List. For each loan, a history record (Z36H) is created when the loan record (Z36) is deleted.

Possible values are: Y or N.

Y= transfer completed loan records to a history file.

The default value is Y.

- CREATE-Z37H

Determines whether or not the system stores information about previous hold requests and displays them in the Item History window which is accessible from the Item List. If you want the system to store the information, enter Y. For each hold request, a history record (Z37H) is created when the hold request record (Z37) is deleted.

Possible values are: Y or N.

Y= transfer completed loan records to a history file.

The default value is Y.

- DEFAULT-BOR-ID

Determines the default value of the Borrower ID.

Possible values are: Y or N.

Y = create default field value, using last-bor-id counter from z52.

The default value is Y.

- **DEFAULT-ADDRESS**

Determines which address type and validity range will be used as default when a new patron is created. The variable format is TT DDD, meaning:

- TT - Two digits representing the default patron address Type
- DDD - A three digit number, representing the number of days for which the default address is to be valid after its creation date. When this variable is set to 999, it is interpreted by the system as permanently valid.

For example, setting the variable to 03 090 means that the default address type is 03 and it is valid for 90 days.

The variable's default is 01 030.

- **DEFAULT-BOR-ID-1**

Determines the default value of the Borrower ID.

Possible values are: Y or N.

Y = create default field value, using last-bor-id-1 counter from z52 (UTIL G/2).

The default value is Y.

- **DEFAULT-BOR-VERIFY-1**

Determines the default field value for the Borrower ID.

Possible values are: Y or N.

Y = create default field value, using last-bor-verify-1 counter from z52.

The default value is Y.

- **DEFAULT-BOR-VERIFY-2**

Determines the default field value for the Borrower ID.

Possible values are: Y or N.

Y = create default field value, using last-bor-verify-2 counter from z52 (UTIL G/2).

The default value is Y.

- **EMAIL-VALIDATION**

Determines whether or not a patron's e-mail validation check is performed when it is populated.

Possible values are: Y or N.

Y = the system performs a patron's e-mail validation check and displays a message if the e-mail address is not valid (warning message, not a block). The check is activated when the patron address is updated and the e-mail field is

populated. It is performed when the address is updated via GUI, OPAC, PLIF loader, DLF-API, and X-services.

The default value is N.

If the flag is set to Y, the validation includes:

1. Syntax check
  - a. Existence of only one “at” symbol (@).
  - b. Existence of a dot after the “at” symbol (@).
  - c. No space in the e-mail address.
2. Domain existence check - a check confirming that the remote server exists.

- **ENCRYPT-Z308**

Determines whether or not the patron identifying numbers are encrypted.

Possible values are: Y or N.

Y = indicates that the patron identifying numbers are encrypted.

The default value is N.

- **FAST-CAT-HOLD-ID**

Determines the ID that will be used for automatically creating a hold request on a fast cataloged item in Circulation.

Possible values are all 12 uppercase letter IDs that are valid patrons in the ADM.

If this entry does not exist then:

If the library uses user-sharing then the ID will be "CATALOGER".

If the library does not use user-sharing then the ID will be a concatenation of "CAT-" and the library name.

- **HOLD-FULFILL-NOTIFY**

This variable sets the system behavior when an item is transferred from the owning library to the pickup library.

Possible values are 1,2.

1 = Notify the patron about the request fulfillment only when the item arrives at the pickup location.

2 = Notify the patron about the request fulfillment when the item is sent from the owning library.

The default value is 1.

- **HOLD-REQ-PROCESS-STATUS**

Determines which "like copies" can satisfy a hold request.

Possible values are: Y or N.

Y - Only items with the same process status as the item on which the hold request was made can satisfy the request.

N - All items can satisfy the request, regardless of their process status.

The default is Y.

- **HOLD-REQUEST-COLLECTION**

Determines whether the system will try to fill a hold request with a copy from the same Collection as the copy selected in the Item List.

Possible values are: Y or N.

Y = If you enter Y, the system will fill in the Collection field of the Hold Request form with the same Collection as the copy selected in the Item List. Only copies with the same collection will satisfy the request.

N = If you enter N, the system will enter the # character in the Collection field to indicate that it does not matter which Collection is used to fill the request.

The default value is Y.

- **HOLD-REQUEST-ITM-STATUS**

This table determines whether the system will try to fill a hold request with a copy having the same item status as the copy selected in the Item List.

Possible values are: Y or N.

Y = If you enter Y, the system will fill in the item status field of the Hold Request form with the same item status as the copy selected in the Item List.

N = If you enter N, the system will enter the # character in the item status field to indicate that it does not matter which item status is used to fill the request.

The default value is Y.

- **ITEM-BARCODE-OR-CALL-NO**

Disables or enables item retrieval by call number when using the Item Bar (Circulation and Cataloging GUI).

Possible values are: Y or N.

Y - Item retrieval by call number is enabled (in the Item Bar in Circulation or Cataloging GUI).

N - Item retrieval by call number is disabled (i.e. there is an attempt to retrieve the item by barcode; if it fails, no further attempt is made to retrieve by call number).

The default value is Y.

- **ITEM-BOR-INFO-CIRC-ONLY**

Determines whether or not circulation information that is displayed in modules other than the Circulation module will include patron information. This includes current loan information and loan and hold history information that is displayed in the Cataloging and Acquisitions modules.

Possible values are 'Y' and 'N':

Y - Do not display patron information outside the Circulation GUI.

N - Display patron information outside the Circulation GUI.

The default value is 'N'.

- **LATE-RET-FINE-WHEN-LOST=N**  
This variable is used to set up the library's policy with regard to lost items and overdue charges.

Y = When an item is declared lost, charge any overdue fines that have been accrued up to this point of time. In addition, charge the lost-item charges according to the regular tab34 definitions. If the item is later returned, refund the lost-item charges according to the regular LOST-LOAN-CREDIT-METHOD and REFUND-RATE tab100 variables policy. Do not create any new overdue fines at this point.

N = When an item is declared lost, do not charge any overdue fines that have been accrued up to this point of time. Do charge the lost-item charges according to the regular tab34 definitions. If the item is later returned, refund the lost-item charges according to the regular LOST-LOAN-CREDIT-METHOD and REFUND-RATE tab100 variables policy. In addition, create overdue fines at this point for the entire overdue period, including the period of time in which the item was declared lost.

- **LOST-LOAN-CREDIT-METHOD**

Determines which cash transactions are credited when a lost loan is returned.

Possible values are:

1 = when a lost loan is returned (that is an item which has a Z36 record with status "L"), all associated cash transactions except those with "waived" status are credited. This means "C"losed, "T"ransferred or "O"pen transactions are credited. In addition, partially waived transactions are not credited at all.

2 = when a lost loan is returned, all "T"ransferred or "O"pen transactions are credited. Closed transactions are not credited automatically. In addition, partially waived or partially closed transactions are fully refunded, regardless of the tab100 variable REFUND-RATE.

3 = like 1 but REFUND-RATE only applies for "C"losed transactions. Other transactions are fully refunded.

4 = like 1 except that Open transactions are credited by waiving the lost bill debit transaction.

5 = like 2 except that Open transactions are credited by waiving the lost bill debit transaction.

6 = like 3 except that Open transactions are credited by waiving the lost bill debit transaction.

The default value is 1.

- **LOST-PROC-STATUS**

Determines the process statuses that will be removed from an item if the item's barcode is read in a circulation action.

The format of the variable is 'P1 P2 P3', where 'P1', 'P2' and 'P3' are item process statuses.

Default Value: Spaces

- **OFFLINE-CASH-TRANS**

Determines whether or not offline circulation registers cash transactions. This depends on the OFFLINE-CASH-TRANS variable.

Possible values are: Y or N.

Y = The system registers cash transactions triggered by circulation transactions effected through offline circulation.

N = The system does not register cash transactions triggered by circulation transactions effected through offline circulation.

The default value is Y.

- **ONLINE-RECALL**

This variable sets the library policy regarding online recall.

Possible values are: Y or N

Y = any request that is created in the GUI and is required for recall will trigger a recall when the request is submitted.

N = a recall will be triggered only when the 'Recall Items on Loan (cir-13)' service is run.

The default value is N.

- **OVERDUE-LETTER-NO**

Defines the number of overdue letters sent to be considered as a block in circulation functions.

Possible values are: 0, 1, 2, 3 or 4.

Defines "overdue" for tab\_check\_circ\_1 block. A loan is overdue if the due date has passed and "n" or more notices have been sent.

The default value is 0.

- **OVERDUE-LETTER-STYLE**

Determines whether or not an overdue notice should be standard or sensitive to the letter number.

Possible values are: Y or N.

N = standard overdue notice, without special text.

Y = overdue notice text is sensitive to letter number.

The default value is N.

- **OVERDUE-RECALL-RATIO**

Defines whether the values in col.5 of lines 0050-0055 in tab18.lng (fines relating to recalled items) are to be treated as a ratio, as an actual amount or as a combination of both.

Possible values are: Y, N or B.

Y or blank = values are ratio multiplier of the basic fine set in col.11 of tab16.

N = values are actual amount per day

B = Both - values are actual amount added to the basic fine set in col.11 of tab16.

Example:

Using fine method 7 (fine for total days including recall fining) in col.14 of tab16:

OVERDUE-RECALL-RATIO set to Y:

```
col.4 tab18:    Y
col.5 tab18:    2
col.11 tab16:   0.50
```

The daily fine charged is \$0.50 after the due date. After the item is recalled, the daily fine is still \$0.50. After the recall due date has passed, the daily fine is  $0.50 \times 2 = \$1$ .

Using fine method 7 (fine for total days including recall fining) in col.14 of tab16:

OVERDUE-RECALL-RATIO set to N:

```
col.4 tab18:    Y
col.5 tab18:    2
col.11 tab16:   0.50
```

The daily fine charged is \$0.50 after the due date. After the item is recalled, the daily fine is still \$0.50. After the recall due date has passed, the daily fine is \$2.

Using fine method 7 (fine for total days including recall fining) in col.14 of tab16:

OVERDUE-RECALL-RATIO set to "B":

```
col.4 tab18:    Y
col.5 tab18:    2
col.11 tab16:   0.50
```

The daily fine charged is \$0.50 after the due date. After the item is recalled, the daily fine is still \$0.50. After the recall due date has passed, the daily fine is  $0.50 + 2 = \$2.50$ .

The default value is Y.

- PATRON-LIST-ID-TYPE

Determines which Z308 key will be used for building the ID in the patron list (Z353). In this way, additional IDs can be used as IDs in the patron list instead of the Z303 ID.

The possible value of this variable is any two-digit number that is a valid Z308 type in the system.

By default, the system uses the Z303-ID as the patron list ID.

- PHOTO-REQUEST-STYLE

Determines whether the system will delete the photocopy request after the slip is printed. If the slip is printed by ue\_06 or by cir\_22, the request is not deleted but its status is changed to H.

Possible value is H.



If you leave the adjacent column blank, then the photocopy request will remain in the system and the librarian will be able to determine and record the number of pages used for photocopying and the corresponding fee.

H = If you enter the letter H, the request will be deleted and no follow-up will be possible.

There is no default value.

- **PHOTO-SLIP-STYLE**

For printing photocopy request slips (cir-22). If a suitable item is available, a pickup slip is printed. Otherwise, a wait letter is printed. This variable relates to the list of items that are included in the print slip.

Possible values are: 1, 2 or 3.

1 = list all "like" items in the photocopy request slip. This means that availability is not checked.

2 = list only available "like" items in the photocopy request slip. This implies that availability is checked.

3 = list the first of the available "like" items in the photocopy request slip. This implies that availability is checked.

The default value is 1.

- **PICKUP-LIST-METHOD**

This variable controls how the pickup list will be created when a title request form is loaded.

Possible values are 1,2,3,4

1 = Create a joint pickup list that is based on the pickup locations of all of the available items that are linked to the requested record.

2 = Only the dispatch library that is defined for the patron is a valid pickup location.

Values 3 and 4 are reserved for future use.

The default value is 1.

- **PICKUP-SORT-BY-ITEM**

When presenting pickup location lists for hold requests or photocopy requests, the patron's home library is always used as default. This variable defines which sublibrary will be used as the default when no home library is defined.

The possible values are Y and N:

Y = When Z303-HOME-LIBRARY is not defined, the item's sublibrary will be the default pickup location.

N = When Z303-HOME-LIBRARY is not defined, the default pickup location will be the first sublibrary in the tab37 or tab38 setup.

- **RECALL-METHOD**

Determines whether or not renewals and recalls will update the due date.

Possible values are: 1, 2 or 3.

1 = Let renewals update the z36\_due\_date and let recalls update it, if the recall-due-date is earlier. Use the z36\_original\_due\_date as the "due-date-before-recall". (Let renewals update it.)

2 = Let renewals update the z36\_due\_date. Do not actually update the z36\_due\_date to the recall-due-date. But, if the latter is earlier than the z36\_due\_date, use the latter as the "effective due date". Leave the z36\_original\_due\_date as the actual, original due date. (Do not let renewals update it).

3 = Same as "2", except always use the recall-due-date as the effective due-date -- even if it is later.

The default value is 1.

- **REFUND-RATE <x> <y> <z>**

This variable determines the refund-rate for lost item handling/replacement/notice charges.

When an item that has been declared lost is returned by the patron, the charges that were made when the item was declared lost are refunded. Using this variable can set what percentage of each charge will be refunded.

Possible values are three numbers separated by a single space, each one up to three digits long. The numbers are the refund rates of the handling cost (transaction number 40), the replacement cost (transaction number 41) and the notice cost (transaction number 42) respectively. A value of 0 means that no refund will be made, and a value of 100 means that a full refund will be made.

Default values are 100 100 0.

- **RENEW-DURING-LOAN**

This variable controls the behavior of the system when trying to effect a loan on an already loaned item.

Possible values are: Y or N.

When trying to effect a loan for an item that is already on loan for the same patron the system consults RENEW-DURING-LOAN.

When trying to effect a loan for an item that is already on loan for another patron the system consults RENEW-DURING-LOAN.

Y = If RENEW-DURING-LOAN is Y the system renews the loan for this patron.

N = If RENEW-DURING-LOAN is N the system consults RETURN-DURING-LOAN.

The default value of RENEW-DURING-LOAN is Y.

- **RESET-LETTER-NUMBER**

This variable sets whether an online recall of an item will reset the loan's Z36-LETTER-NUMBER field.

Possible values are: Y or N

Y = online recall of an item will reset the loan's Z36-LETTER-NUMBER field

N = online recall of an item will not reset the loan's Z36-LETTER-NUMBER field

Default value is N

- **RETURN-DURING-LOAN**

This variable controls the behavior of the system when trying to effect a loan for an item that is already on loan for another patron.

Possible values are: 0, 1 and 2.

0 = when an item is being loaned, and the system detects that the item is currently on loan, a message is displayed indicating that the item must be returned.

1 = when an item is being loaned, and the system detects that the item is currently on loan, the item is automatically returned. No cash for overdue and no check for hold requests.

2 = when an item is being loaned, and the system detects that the item is currently on loan, the item is automatically returned and a cash transaction is created if the item was returned late.

The default value is 0.

- **SHOW-USR-VERIFICATION**

Determines whether or not to display the patron verification fields in the GUI Circ and ADMIN clients.

Possible values are: Y or N.

Y = display patron verification fields when updating Z303 (Patron) in GUI CIRC.

N = mask out view of patron verification fields when updating Z303 (Patron) in GUI CIRC.

The default value is N.

- **STORE-CALL-NO-DOLLAR**

When an item's information is overridden by a temporary change, the original information is saved. This variable defines what string will replace a \$ sign in the call number when the call number field is saved. We suggest you use a string that will not appear as part of the call number data.

Possible values are all characters, making up to a 10-character long string.

The default value is the string U+0036.

- **SUB-LIBRARY-DIVISION**

Determines whether the system will try to fill a hold request with a copy from the same sublibrary as the copy selected in the Item List.

Possible values are: Y or N.

Y = If you enter Y, the system will fill in the sublibrary field of the Hold Request form with the same sublibrary as the copy selected in the Item List.

N = If you enter N, the system will enter the # character in the sublibrary field to indicate that it doesn't matter which sublibrary is used to fill the request.

The default value is: N.

- **TIMEZONE-ADJ**

This variable is used to set the "current time" of a library in relation to the server time. The variable's format is a two digit number, prefixed by either a '+' sign or a '-' sign. The number is the difference in hours between the server time and the time zone of the ADM library, and the sign sets whether the ADM library is ahead (+) or behind (-) the server time. This adjustment affects circulation-related activities in an ADM library.

The default value is +00.

- **UPDATE-RECALL-DATE**

This variable determines if, when an item is loaned, and the item already has a recall hold request, the loaned item should immediately be considered "recalled", or whether a loaned item becomes "recalled" only through the Recall Items on Loan service (cir-13).

Possible values are: Y or N.

Y = item loan can trigger "recall". The z36-recall-date and z36-recall-due-date are automatically set at the time of the loan if there is a matching "O" (Original copy/Only selected item) request.

N = recall of a loaned item (update of z36-recall-date and z36-recall-due-date) is triggered only by cir-13.

The default value is N.

- **USER-ADDR-PERMISSION**

This variable defines which types of patrons can have their addresses updated by the staff user.

Possible values are: 0, 1, or 2

0 - Update of patron's addresses is based on standard permissions. Any staff user that has privileges to update and view a patron's addresses can view and update the patron address.

1 – Staff user can update patrons' addresses only if they have one or more Z305 records in the ADM.

2 – Staff user can update patrons' addresses only if they have one or more Z305 records other than the ADM level record.

The default value is 0.

Note that the patron's address can be viewed even if it cannot be updated.

- **USER-HOME-PERMISSION**

Determines whether or not the system checks the staff user library (z66\_user\_library) against the patron's home library, when a staff user modifies patron records (Z303, Z304, Z305)

Possible values are: Y or N

Y- A check is performed on the staff user's library (z66\_user\_library) against the patron's ADM library (derived from the patron's home library field).

The staff user is only permitted to modify the patrons records (Z303, Z304, Z305) if a match is found.

If the patron's Z303 record does not include a value in the Home library field, it can be modified by any staff user (z66\_user\_library field, may include any value)

N - No check is performed and any staff user (with any value in the z66\_user\_library field) can modify the patrons record (Z303, Z304, Z305)

The default value is N.

- **USER-IDS-PERMISSION**

This variable defines which types of patrons can have their additional IDs viewed and updated by the staff user.

Possible values are: 0, 1, 2 or 4.

0 - Update of patron IDs is based on standard permissions. Any staff user that has privileges to update and view a patron's ID can view and update the patron's IDs.

1 – Staff user can view/update patron's IDS only if the patron has one or more Z305 records in the ADM.

2 – Staff user can view/update patron's IDS only if the patron has Z305 records other than the ADM level record.

4 - The staff user can view and update the patron's IDs only if he is connected to a library that includes one of the sublibraries in the patron's list of locally privileged libraries.

The default value is 0.

Note that if the patron's IDs cannot be updated by the staff user, they will not be viewable either.

- **USER-PERMISSION**

This variable defines which types of patron records can be updated by the staff user.

Possible values are: 0,1 or 2

0 - Update of global patron records is based on standard permissions. Any staff user that has privileges to update global patron records can update the patron's record.

1 - Staff user can update Z303 only if it has one or more Z305 records in the ADM.

2 - Staff user can update Z303 only if it has one or more Z305 records other than the ADM level record.

The default value is 0.

Note that patron records are viewable even when they can not be updated.

- **USER SHARING**

The User Sharing variable determines whether the patron records participate in the shared or non-shared section of the database (USR00).

Possible values are: Y or N.

Y = If the ADM library is defined as USER-SHARING=Y, then the patrons created by this library will be displayed in the Patron List when a staff user is connected to ANY library that is defined as "Y" in the USER SHARING variable.

N = Patrons belonging to an ADM library which defines the variable USER-SHARING=N in tab100 will not be included in this Patron List. If the ADM library defines USER-SHARING=N, then the patrons created by this library will be displayed in the Patron List only when a staff user is connected to this specific library.

The default value is N.

- **NOTE-ONPICKUP-ONLY**

Determines whether the message "Item(s) on Hold for this Patron" will be displayed if a patron has hold requests and the work station is in a different sub library than the item's pickup sub library.

N= display the message, regardless of the sublibrary to which the item belongs.

Y= default. Display only if the patron's on-hold item is on the hold shelf that belongs to the sublibrary of the circulation desk station.

### **33. Circulation Values of www\_server.conf**

setenv www\_item\_schedule 14

Defines the number of days that a patron will be able to book an item in advance. For example, if the parameter is set to 14, a patron will be able to book an item up to 14 days in advance.

setenv www\_z37\_recall\_type 03

Defines the default recall type for requests placed in the Web OPAC. If the line is missing from www\_server.conf, the system defaults the recall type to 01.

The valid recall types are 01, 02 or 03, where 01 is regular recall, 02 is rush recall and 03 is no recall.

Recall is related to item status in tab15, col.13 and 14, according to which an item can be recalled or rush recalled. This relates only to the Recall Items on Loan (cir-13) service.

Not all libraries use the recall feature, and not all libraries want every request to automatically be recalled. Some libraries want the recall to be in effect only if the person placing the request comes to the Circulation desk and asks for recall.

This is why the default variable is needed. For libraries that want all requests to automatically be recalls, this variable should be set to 01. For libraries that want to use recall, but only for librarian initiated requests, it should be set to 03.

setenv www\_z37\_date\_to M002

Defines the end of the time slot when creating a hold request through the Web OPAC.

The variable definition should include one character that describes the time period (D- day, M- month, Y- year) and a 3 digit value for quantity, for example, M006. This will create a hold request that starts from the current date and ends in six months.

If the variable is not defined, or is defined incorrectly, the default "date to" will be three months.

setenv www\_z36h\_max\_record\_limit 100

Defines the maximum number of Z36H records displayed in the Web OPAC's User Information - Loan History list

### Sort Order of Loans, Holds and Photocopy Requests

The following display parameters in www\_server.conf allow you to configure the sort order of loans, holds and photocopy requests in the Web OPAC:

```
setenv www_user_z36_sort_routine      00
setenv www_user_z36_sort_order        A

setenv www_user_z37_sort_routine      00
setenv www_user_z37_sort_order        A

setenv www_user_z38_sort_routine      00
setenv www_user_z38_sort_order        A
```

The available routines are:

#### **z36 (Loans):**

00 = z36-due-date

01 = z36-sublibrary z36-status z30-collection z36-due-date

#### **z37 (Holds):**

00 = z37-priority z37-request-date z37-open-date z37-open-hour

01 = z30-sublibrary z30-item-status z30-collection z37-open-date z37-open-hour

02 = z30-sublibrary z30-item-status z30-collection z37-status z37-open-date z37-open-hour

#### **z38 (Photocopy):**

00 = z38-open-date

The available sort orders are:

A = Ascending Order

D = Descending Order

## **34. Return Receipt**

The calculation of the value of the fine in the column by this name in the return receipt is dependent on the existence of a matching Z36H record. Libraries that do not

keep Z36H records should not use this column. If there are no Z36H records, the fine will appear as 0.00.

### 35. Column Headings (pc\_tab\_col.lng)

pc\_tab\_col.lng defines the columns of information that are displayed in list windows in the GUI clients.

In order to define column headings, edit the bibliographic library (USM01) table pc\_tab\_col.lng. For more information about pc\_tab\_col.lng, see the ALEPH User Guide - General chapter - Using and Customizing Your GUI.

The following is a list of the Circulation windows which use pc\_tab\_col.lng for formatting data, and their identifiers (Column 1 in pc\_tab\_col.lng):

Unique Code	Circulation GUI Windows
ADMIN_PROFILE_LIST	User Profile List
CHECK_CIRC	Item loan blocks
CHECK_HOLD_REQ	Hold request blocks
PC_CASH_CASH_EXPAND	Patron Information - Cash Expand
PC_CASH_SUB_TOTAL	Cash Subtotal by Sublibrary*
PC_CASH_SUMMARY	Patron Information - Cash transaction > tab *
PC_CIR_B_HOLD_LIST	Patron Information - Hold List
PC_CIR_B_ILL_LIST	Patron Information - ILL Requests*
PC_CIR_B_LOAN_LIST	Patron Information - List of Loans*
PC_CIR_B_PHOTO_LIST	Patron Information - List of Photocopy Requests*
PC_CIR_B_TITLE_LIST	Patron Information – Title Request List
PC_CIR_BOOKING_LIST	Item and patron booking list
PC_CIR_BOR_LIST	Global Patron Information/Local Patron Information
PC_CIR_CHANGE_ITEM	Change Item List
PC_CIR_D_HOLD_LIST	Item List - List of Hold Requests*
PC_CIR_D_LOAN_LIST	Item List - List of Loans
PC_CIR_D_PHOTO_LIST	Item List - List of Photocopy Requests
PC_CIR_DEL_HOLD_LIST	Item Delete Hold Request List
PC_CIR_HOLD_LIST	Hold Request List*
PC_CIR_ITEM_LIST	Document Item List



Unique Code	Circulation GUI Windows
PC_CIR_LOAN_EXPAND	Patron Information - Loan Expand
PC_CIR_LOAN_INFO	Loan/Return window - Patron Information in upper part
PC_CIR_LOAN_LINE	Loan window - Individual loan line in bottom part
PC_CIR_RENEWALL_LOG	Patron Information - Renew All Log*
PC_CIR_RESTORE_ITEM	Restore Item List
PC_CIR_RETURN_INFO	Return Window - Item Info in bottom part
PC_CIR_RR_LOAN_LIST	Reading Room Items
PC_CIR_RR_SUBLIBS	Reading Room Sublibrary List
PC_CIR_S_LOAN_LIST	Reserve Items
PC_CIR_S_LOAN2_LIST	Patron Information - Advance Booking
PC_COM_ADDR_LIST	Patron Information - Address List
PC_COM_BOR_IDS_LIST	Patron Information - Global Information - Update IDs - IDs Information
PC_COM_DOC	Brief List - Display BIB and ADM Record
PC_COM_HOLD_H_LIST	Item Circulation History - Hold Request List
PC_COM_HOLD_H_LIST_1	Item Circulation History - Hold Request List in ACQ and CAT if ITEM-BOR-INFO-CIRC-ONLY=Y
PC_COM_LOAN_H_LIST	Item History - List of Loans
PC_COM_LOAN_H_LIST_1	Item History - List of Loans in ACQ and CAT if ITEM-BOR-INFO-CIRC-ONLY=Y
PC_COM_SCAN	Scan for an Administrative Record
PC_COM_SCAN_I	Scan for an Administrative Record (Scan on Index)
PC_COM_SCAN_W	Scan for an Administrative Record (Scan on Words)
PC_COM_USER_LIST	Patron List
PC_USER_PROXY_LIST	Patron Information - Proxies/Sponsor
SHORT_LIST	Search for an Administrative Record - Brief List

\* In this GUI table, an optional color/font can be used by the system for color/font differentiation between values in the same column. The alternative font and color can be defined in Column 8 and 9 of `pc_tab_col.lng`.

## 36. Overnight Loan Setup

In order to set up rolling loan periods overnight the special setup described below is required:

Reservation of the item for overnight loan is allowed, and the item is loaned according to a defined overnight time slot. During the day, the item is loaned for a given period (for example two hours), and cannot be booked.

The day loan is set in "tab16" as shown in the example below:

```
16A 35 ## ## + 00000000 00 + 0200
```

This example of "tab16" means that:

items from libraries of group ID "16A", in status "35" and in any process status - can be loaned to patron of any status - for two hours (0 days, 0 "grace days", + 2 hours).

There could be a problem when the day loan approaches the time of the overnight reservation, for example, when the overnight loan starts at 17:00 and a patron comes to loan the item at 16:00. The item should be returned at 17:00 and not at 18:00 as it will be using tab16.

The solution can be set as follows:

Set two tab16 tables called tab 16.1 and tab 16.2. The first one will include the definitions for the two-hour loan periods during the day:

```
16A 35 ## ## + 00000000 00 + 0200
```

For the item status "35", the item is loaned for 2 hours.

The other tab16 table will define for the same item status an actual due hour at 09:30:

```
16A 35 ## ## + 00000000 00 A 0930
```

In \$alephe\_proc there are two procedures, which switch between the tables.

In \$alephe\_tab/job\_list, list the \$aleph\_proc/p\_switch\_tab16\_1 and p\_switch\_tab16\_2 procedures on the relevant days at the relevant times. This can be done using UTIL E/16/1 (Edit job\_list):

```
W1 05:00 N tab16_1.log csh -f /aleph/proc/p_switch_tab16_1
USM50
W1 15:00 N tab16_2.log csh -f /aleph/proc/p_switch_tab16_2
USM50
```

The above settings will run the procedure that switches between the tab16 tables, at 05:00 and at 15:00, respectively.

Note that these procedures cannot be run from the UNIX utility "chron" but only from job\_list.

## 37. Printing in Circulation

The circ.ini settings for printing in Circulation are described in the CIRC.INI section of the Printing System Librarian chapter.

## 38. Patron Picture

A picture of a patron is displayed in the Circulation GUI if a matching picture file is present in the relevant subdirectory on the server. The picture's file name is the Patron's ID. The following file formats can be used: \*.jpg, \*.jpeg, \*.gif, \*.bmp,\*.jif, \*.rle and \*.dib. If the file name contains letters, these must be saved in lowercase. When loading a patron picture through the GUI, the system converts the uppercase letters to lowercase automatically, so uppercase letters in the file name do not present a problem.

The picture is displayed in a square window. If the original picture does not matching this format, the picture is compressed to fit into the GUI picture window. It is best to use pictures that have a width/height ratio of 1:1 to get the optimum results.

The picture files reside in the [usr\_library]/bor\_pics subdirectory with the usr\_library as defined in the ./alephe/aleph\_start table in the line:

```
setenv    usr_library          USR00.
```

If the bor\_pics directory has reached the limit of 1000 pictures, new files will be stored in numbered directories under bor\_pics, such as bor\_pics/1, etc.

The file name of the picture is the Patron's ID plus extension. For example, a picture file with the name 1234567.jpg will be displayed with the patron record of the patron with the ID 1234567. If there is more than one file present, the system displays the picture of the file it first encounters. If there is no matching picture file, the system displays the default\_picture.\* file, if present. If this is also not present, the system displays the .\alephcom\bmp\DefBor.gif file which is stored on the client after the installation of ALEPH.

A picture can be added or updated through the GUI "Update Picture" utility. Click on the Update Picture button to open a dialog box which lets you load a picture file from the local PC or from the network and see its preview. The default subdirectory that is opened is set in circ.ini. After confirming by clicking **OK** in the dialog box, the new picture file is saved on the server in the bor\_pics directory of the user library (for example, ./usr00/bor\_pics) under the patron ID plus the extension of the file from the PC. For example, if a file such as "mypicture.jpg" is loaded for patron 1234567, the new file will be "1234567.jpg" (under bor\_pics). Note that at this point, all other picture files of that patron are deleted (for example, "1234567.gif").

In addition to the Global Patron Information tab, the picture is refreshed upon updating, in the loan and return tabs.

When deleting a patron, whether individually through the GUI, or through the Delete

Patrons (cir-23) service, all picture files with the patron's ID, regardless of their extension, are deleted. The default\_picture.jpg file will not be deleted even if a patron with ID DEFAULT\_PICTURE is deleted.

## **39. Expand Display**

The information in expand display panes is generally taken from one specific Oracle record field. For example, the patron's name is always taken from Z303-NAME. In some instances the information is taken from different sources, some of which are Oracle record fields.

### **39.1. Display of Workstation Identity**

There are three possibilities for displaying the workstation's identity in an expand window.

The station ID

The staff user's name

The IP address

Whether the station identity is displayed as a station ID / staff user's name or as an IP address, depends on the user's choice. If the user set up a station ID, the station ID or staff user's name is used, otherwise the workstation's IP address is used.

The station ID is set using the Set Workstation Identifier function, available by clicking the key icon at the bottom right of the screen. It is saved locally as an encrypted value in `.\alephcom\tab\stationid.dat`.

The user's staff name is taken from the Oracle record field Z67-USER-NAME.

The station's IP address is taken from the network setup.

## **40. Circulation Values of prof\_library.conf**

ue\_06\_active\_hours

This variable determines the time period in which the requests daemon can actually be run. Note that this setup is by ADM library.

## **41. Duplicate Patron IDs**

Duplicate IDs for the same patron are always allowed. There are certain conditions where it is also possible to use the same ID for different patrons.

The system checks for duplicate IDs as follows:

IDs that are NOT used as the key to retrieve Z303 in the GUI (N in column 5 of `tab_bor_id.lng`) can be duplicated for different patrons.

In the case where there is a duplicate ID date for two different patrons, the system checks that:

The IDs are of a different type (Z308-KEY-TYPE). It is not possible to enter the same ID for different patrons with the same ID type.

The IDs have different verification fields (Z308-VERIFICATION). It is not possible to have two identical pairs of ID and verification in the system.

Duplication is not possible between IDs that are not used as the key to retrieve Z303 in the GUI and those that are used as the key in the GUI (Y in column 5 of `tab_bor_id.lng`).

Duplication will only be allowed between ID types that are used by the patron to sign in to the Web OPAC.

There is a possible scenario where there are two identical IDs with two different verifications. If one of the patrons tries to change his password through the Web OPAC to the same one as the other patron, the system will alert the patron and will not let him save the new password until he enters a password that is different from the password of the other patron that has the same ID.

## 42. Remote Registration

The remote registration option can be used to create new patron records by copying a patron record from another ALEPH library outside your system in the same version, or from or to a "non-shared" ADM library in your own system. The expected scenario is that of a patron who is registered in the Education library at one university, walks in to apply for services at another (non-shared) library at the same institution, or at another institution. Provided that the libraries cooperate, and that the needed settings exist, the second library will be able to derive the patron's records from the institution where he is already registered, and the barcode on the patron's library card can be used at any of the libraries at which he is registered. The records that can be copied are the patron's global record; the patron's ID records; the patron's address records and the patron's local record. Note that the matching element for checking if the patron is already registered in your system is the patron's barcode. When a match between the patron's barcode in the remote system and the local system is found, the procedure is stopped. If no match is found, the system will copy the patron records into the local database.

## 42.1. Remote Registration Settings

There are a number of elements that need to be defined in order for this functionality to work:

All the libraries that work in cooperation and participate in this environment must be registered in the library.ini file located under the client's ALEPHCOM/TAB/. For example:

```
USM50 - USMARC Administrative   USM50 10.1.235.39:6515
USM51 - USMARC Administrative   USM51 10.1.235.39:6595
```

These libraries must also be registered in the rmt\_reg.ini file located under CIRC/TAB. This file lists the libraries that will appear in the drop down menu in the Circulation client when opening the Remote Registration option from the Patrons main menu. For example:

```
!-----
!  
!   List of remote registration libraries  
!  
!----->  
USM50  
USM51  
TST50
```

There is no limit on the number of libraries that can be listed in this file.

The operator must have a valid password defined in the remote library in order to be able to derive the patron records from that library. This password must include the following permissions:

```
Patrons, Global/Display List   (USR/LIST)  
Patrons, Global/Patron Record - Display (USR/SHOW)
```

The operator must also have the appropriate permissions in the local library so he can work with these records.

There are two possible ways for the system to operate regarding the operator's user name and password when using the Remote Registration option:

- The system automatically checks the operator's user name and password in the remote library. If the same user name/password is found in the remote library, the system will proceed and show the Remote Patron List. When there is no such user in the remote library, the system will display the ALEPH Temporary Password window for entering the password that is valid on the other system.
- When choosing the Remote Registration option from the Patrons main menu, the system displays the ALEPH

Temporary Password window for entering the password to work with. No check is performed prior to that.

This is determined in the circ.ini file in the following section:

```
[RemoteRegistration]
UseGlobalPassword=N
```

When set to N, the system does not perform a preliminary check and immediately shows the ALEPH Temporary Password window when the Remote Registration option is chosen.

When set to Y, the system first tries to check the current operator's password in the remote library. The ALEPH Temporary Password window will be shown only if there is no such user name and password in the remote library.

When copying patron records from a remote library, you can perform checks on the patron that is targeted for import records.

The checks should be listed in the RMT-REG section of `tab_check_circ` (located under `. /xxx50/tab`). The definition should appear in each of the ADM libraries from which the records are copied.

The relevant checks in this section are the ones that check the global aspects of the patron records. For example, the global patron record blocks, the blocks on the patron's ALEPH record, etc. Following is an example from the table:

```
RMT-REG    check_circ_1_a
RMT-REG    check_circ_1_b
RMT-REG    check_circ_1_c_a
RMT-REG    check_circ_1_c_b
RMT-REG    check_circ_10_a
```

The checks are performed when the patron is selected. If error messages are received, the operator can nevertheless override them and copy the patron records to the library.

When copying patron records from a remote library, the Home Library field in the global record will be populated with the active ADM library of the local system. The original home library from the remote system will be saved in the Note 3 field of the global record for follow up.

The text for the note referring to the patron's original home library is set in the `window.dat` file located under `CIRC/TAB/<lng>`. The following entry in the `window.dat` file is consulted:

```
RemoteRegistration.Field3          REMOTE REGISTRATION:
HOME-LIBRARY=%s RMT-LIBRARY=%s
```

## Patron Addresses

If the operator authorization in the remote library includes Patrons, Global/Addresses

Display (USR/ADDRESS-GET), then the addresses are copied from the remote library to the current library.

### Patron Local "ALEPH" Record

If the operator authorization in the remote library includes Circulation/Patron, Local Display (CIRCULATION/BOR-SHOW) and if the patron status in the remote library's ALEPH record is a valid patron status in the current library, an "ALEPH" local library record, with this status, is created in the current library. The settings in the local "ALEPH" record are dependent on the definitions for the borrower status in the current library's `tab31`.

## 43. Different Hold Request Forms (`tab_hold_request_form`)

You can define the system to use different hold request forms when the patron places a hold request through the Web OPAC. Two definitions are required:

Create the desired settings in the `tab_hold_request_form` table with a new suffix.

Copy the hold request forms to files with the same names but with the suffix from `tab_hold_request_form`.

### 43.1. `tab_hold_request_form`

This table sets the option to configure the system to use different hold request forms when the patron places a request through the Web OPAC. When a request is placed, the system will look for a matching line in the table. The correct line will be selected according to one of the available parameters in this table: the item's sublibrary, item status, item process status, patron status and item's availability that is determined according to the AVAILABILITY-ROUTINE variable in `tab100`.

If no match is found, the system will display the hold request forms without the suffix. The same will happen if the table does not exist. Note that as in most of ALEPH table, specific lines should come before the general ones. For example:

```
32 ##### DP ## # depo32
## ##### DP ## # depo
```

Following is an example of the table:

```
! 1 2 3 4 5 6
!!!!-!!-!!-!!-!!-!!!!!!
ULINC 42 ## ## N nonav
##### 32 DP ## # depo32
##### ## DP ## # depo
ULINC ## ## 03 # 03ulinc
```



##### ## ## 03 3 03

Following are details about each column:

Column 1: Sublibrary, the item's sublibrary.

Column 2: Item Status

Column 3: Item Process Status

Column 4: Patron Status

Column 5: Item Availability Status. The optional values in this column are Y or N. The item availability is set according to the value in the AVAILABILITY-ROUTINE variable of `tab100`.

Column 6: WWW Form Suffix. This is the suffix to be used to identify the special set of hold request forms in the `/alephe/www_f_lng` directory.

## 43.2. Creating a Different Set of Hold Request Forms

After a suffix is created in `tab_hold_request_form` for a specific combination of the available parameters, copy the following pages to files with the same name but with the created suffix:

item-hold-request-body  
item-hold-request-head  
item-hold-request-tail  
booking-page-delivery-form-head  
booking-page-pickup-form-head  
booking-page-return-pickup-head  
booking-page-return-delivery-head  
booking-page-form-body  
booking-page-return-delivery-tail  
booking-page-delivery-form-tail  
booking-page-pickup-form-tail  
booking-page-return-pickup-tail

For example:

item-hold-request-body-depo  
item-hold-request-head-depo  
item-hold-request-tail-depo  
booking-page-delivery-form-head-depo  
booking-page-pickup-form-head-depo  
booking-page-return-pickup-head-depo  
booking-page-return-delivery-head-depo  
booking-page-form-body-depo  
booking-page-return-delivery-tail-depo  
booking-page-delivery-form-tail-depo

booking-page-pickup-form-tail-depo  
booking-page-return-pickup-tail-depo

This example was created to define a different set of hold request forms for remote storage items.

Note that in order for the hold request page to be fully displayed, all of these pages need to have this suffix. Change the pages as desired to create different sets of hold request forms. Note that you can change the text that appear on the pages, the location of the various place holders or remove a place holder. The place holders are the same through the different type of pages and it is not possible to add place holders.

## 44. Different Photocopy Request Forms (tab\_photo\_request\_form)

You can define the system to use different photocopy request forms when the patron places a photocopy request through the Web OPAC. Two definitions are required:

1. Create the desired settings in the `tab_photo_request_form` table with a new suffix.
2. Copy the hold request forms to files with the same names but with the suffix from `tab_photo_request_form`.

### 44.1. 43.1 tab\_photo\_request\_form

This table sets the option to configure the system to use different photocopy request forms when the patron places a request through the Web OPAC. When a request is placed, the system looks for a matching line in the table. The correct line is selected according to one of the following available parameters in this table: the item's sublibrary, item status, item process status, patron status, and item's availability that is determined according to the `AVAILABILITY-ROUTINE` variable in `tab100`.

If no match is found or the table does not exist, the system displays the photocopy request forms without the suffix. Note that as in most of the ALEPH table, specific lines should come before the general ones. For example:

```
32 ##### DP ## # depo32
## ##### DP ## # depo
```

The following is an example of the table:

```
! 1 2 3 4 5 6
!!!!-!!-!!-!!-!!-!!!!!!
ULINC 42 ## ## N nonav
##### 32 DP ## # depo32
##### ## DP ## # depo
ULINC ## ## 03 # 03ulinc
##### ## ## 03 3 03
```

The following are details about each column:

Column 1: Sublibrary, the item's sublibrary.

Column 2: Item Status

Column 3: Item Process Status

Column 4: Patron Status

Column 5: Item Availability Status. The optional values in this column are Y or N. The item availability is set according to the value in the AVAILABILITY-ROUTINE variable of `tab100`.

Column 6: WWW Form Suffix. This is the suffix to be used to identify the special set of hold request forms in the `/alephe/www_f_lng` directory.

## 44.2. Creating a Different Set of photocopy Request Forms

After a suffix is created in `tab_photo_request_form` for a specific combination of the available parameters, copy the following pages to files with the same name but with the new suffix:

- `item-photo-request-body`
- `item-phot-request-head`
- `item-photo-request-tail`
- `item-photo-request-tail-an` (if used)

For example:

- `item-photo-request-body-depo`
- `item-phot-request-head-depo`
- `item-photo-request-tail-depo`
- `item-photo-request-tail-an-depo`

This example was created to define a different set of photocopy request forms for remote storage items.

Note that in order for the photocopy request page to be fully displayed, all these pages need to have this suffix. Change the pages as desired to create different sets of photocopy request forms. Note that you can change the text that appear on the pages, the location of the various place holders or remove a place holder. The place holders are the same through the different type of pages and it is not possible to add place holders.

## 45. Patron Retrieval by Concatenation of ID and Verification

You can retrieve a patron by using the ID (that is, Z308-KEY-DATA) and the password/verification (Z308-VERIFICATION).

Z308-KEY-DATA comprises of a patron name (for example, "NANCY"), a

concatenation character (for example, a hyphen "-") and the verification (for example, "X"):

```
Z308-KEY-DATA : NANCY-X
Z308-VERIFICATION : X
```

This lets a patron log in with a user name and its verification. For example:

```
User Name: NANCY
Verification: X
```

The program looks for Z308-KEY-DATA "NANCY" first. If it is not found, it looks for "NANCY-X".

In order to enable this, the following configurations must be set:

The concatenation character must be defined in `./alephe/aleph_start`:

```
setenv bor_id_concat_char -
```

Column 8 in `tab_bor_id.lng` must be set to "N" for the codes used for this purpose, to prevent patrons from changing their verification.

## 46. Defining the Zip Code Format for a Patron's Address in Printouts

ALEPH supports both the USA and Canadian ZIP code formats. Which format is used, is defined in the XML translation file `global.trn` in the `form_eng` directory.

Enter the line:

```
z302-zip                                ZIP-CAN      S
```

to use the Canadian format (123 456).

Enter the line:

```
z304-zip                                ZIP-USA      S
```

to use the USA format (12345-6789).

For any other format, do not enter any line in `global.trn`. The ZIP code will be displayed exactly as it was entered.

In addition, the ZIP code can be appended to the last address field, instead of being shown in a separate field. This can be done for all three zip formats (that is, USA, Canadian and unformatted) by configuring `global.trn` (or any form-specific `trn` file) in the following way :

```

z302-address-0          AP-ZIP-USA S z302-zip z302-address-1
z302-address-1          AP-ZIP-USA S z302-zip z302-address-2
z302-address-2          AP-ZIP-USA S z302-zip z302-address-3
z302-address-3          AP-ZIP-USA S z302-zip z302-address-4
z302-address-4          AP-ZIP-USA S z302-zip
z302-zip                TO-BLANK   S

```

Using this setup will append the ZIP code in USA format to the z302-address-0 field if it is not empty and the z302-address-1 field is empty or to the z302-address-1 if it is not empty and the z302-address-2 field is empty and so on.

The following line deletes the Z302-zip field so that it will not show up in the form twice:

```

z302-zip                TO-BLANK   S

```

You can append the ZIP code to the last address field while using Canadian format by using AP-ZIP-CAN instead of AP-ZIP-USA. You can also append the ZIP code to the last address field without formatting by using AP-ZIP instead of AP-ZIP-USA.

## 47. Log File Expansion

The `pc_server` log file can be expanded to include information on the status of the checks that were performed on a hold request. This means that the exact number of errors caused by each check configured in `tab_hold_request` can be logged. This is done by setting the environment variable `DEBUG_CHECK_HOLD` to `Y` prior to `pc_server` initialization in the following manner:

```
setenv DEBUG_CHECK_HOLD Y
```

If this configuration is set, the log file will include information such as :

```
check_hold_request "CIRC      " :
```

```
After check_hold_request_a BUF-ERROR-NO-ERRORS=01
```

```
After check_hold_request_b BUF-ERROR-NO-ERRORS=02
```

```
After check_hold_request_c BUF-ERROR-NO-ERRORS=02
```

## 48. Booking Requests

In order to set booking request policy, you must consider the following issues:

- Booking staff and patron permissions
- Item booking availability
- Like item policy
- Booking checks
- Booking head, tail and delivery time
- Booking release time
- Booking delete interval
- How far into the future requests can be made
- Delivery policies
- Cash policies

The setup for each of these issues is described below.

### 48.1. Patron Booking Permissions

The following booking-related default patron permissions are set in the ADM library's `tab/tab31` table:

- Item Booking Permission - This is set in column 20 of the table. If this column is set to 'Y' then booking is allowed for all available items, meaning that the item has not been defined as N in column 16 of `tab15.lng`. If it is set to 'N'

then booking is permitted only for items that have been defined in `tab15.lng` (column 16) as available for all (Y).

- Ignore Closing Hours – This is set in column 21 of the table. Setting this column to ‘Y’ has two consequences:
  - The release time will not be taken into account for requests that were placed by a patron with this patron status. The requested item will therefore be kept until the patron comes to pick it up, no matter how late he is.
  - Item booking limitations concerning library closing or opening hours are disregarded when the patron places a booking request.

#### Note

Patron permissions are checked only if `check_booking_a` has been defined in the proper BK- section of the `tab_hold_request` table for regular bookings or in the AB-POST section for advance booking requests.

## 48.2. Staff Booking Permissions

The following staff permissions are defined in `alephe/tab/user_function.eng`

CIRCULATION	BOOKING-VIEW	Booking request – View
CIRCULATION	BOOKING-UPDATE	Booking request - Update
CIRCULATION	BOOKING-CREATE	Booking request - Create
CIRCULATION	BOOKING-OVERRIDE	Booking request - Override Blocks
CIRCULATION	BOOKING-DELETE	Booking request - Delete
CIRCULATION	BOOKING-DELIVER	Booking Request – Deliver

#### Note 1

The staff permissions that are required for advance booking requests are

CIRCULATION	SCHEDULE-LIST	Advance Booking - List of slots
CIRCULATION	SCHEDULE-REQUEST	Advance Booking - Create

#### Note 2

The staff user must also be registered as a patron in order for the **Availability** button to be usable by the staff user when creating a booking request from the GUI.

## 48.3. Item Booking Ability

Definitions of the item booking capabilities are defined in the ADM library’s `tab/tab15.lng` table. You must define the following in this table:

**Reloaning limit** – This is set in column 15 of the table. The value denotes the number of hours during which the same copy of an item cannot be re-loaned or re-booked to the same patron starting from the time he returns it or the end time of an existing booking request. The values "00" or blanks are used for unrestricted re-loaning and re-booking.

**Item booking capability** – This is set in columns 16 and column 17 of the table.

In column 16 three different options can be used to define the different booking restrictions of an item status:

- Y - Booking is possible for all patrons, regardless of their booking permissions.
- N - Booking is not possible
- C - Booking permission is conditional. Only patrons that have been granted booking permissions in their local privileges record can book the item.

In column 17 the item's availability with regard to library open hours is set. Three options are configurable:

- A - Booking is possible at all times (both open and closed hours)
- O - Booking is possible only during open hours
- C - Booking is possible only during closed hours

While the reloading limit is hardcoded and is always checked for both types of bookings, the item booking capability is checked only if it has been defined for checking in the BK- section of tab\_hold\_request for regular bookings and in the AB-POST section for advance booking requests.

#### 48.4. Maximum Number of Bookings and Maximum Booking Period

Definitions of the patron's restrictions with regard to booking are defined in the ADM library's tab/tab16 table. Two types of restrictions are defined in this table:

**Maximum number of active bookings** – This is set in column 26 of the table. The value can be set as maximum per sublibrary and item status, for all item statuses in the sublibrary (by setting the item status to 99), for all item statuses in the same group of sublibraries (by setting the 98 line), or for the entire ADM (by setting the ADM code instead of the group code in column 1).

- **Maximum Booking Period** – A booking request can not be set by the patron to be longer than the maximum period that the item would have been loaned. Columns 5,6,8,9 for regular items and columns 15,16,17,18 for requested items set this maximum period, as it is done for loans.

Note that these checks will only be performed if they have been defined for checking in the BK- section of tab\_hold\_request for regular bookings and in the AB-POST section for advance booking requests.

#### 48.5. Like Item Policy

Defining what items are considered *like items* is important for calculating item availability. Since an item is considered available if any item that is its *like item* is available, setting this policy will influence the availability of a requested item. Other than having similar material type and enumerations, the items must be *like* in one of the following item parameters in the ADM library's tab/tab100 setup:



SUB-LIBRARY-DIVISION – Setting this variable to ‘Y’ means that the two items must belong to the same sublibrary to be considered *like*.

HOLD-REQUEST-ITM-STATUS – Setting this variable to ‘Y’ means that the two items must have the same item status to be considered *like*.

HOLD-REQ-PROCESS-STATUS– Setting this variable to ‘Y’ means that the two items must have the same item process status to be considered *like*.

HOLD-REQUEST-COLLECTION– Setting this variable to ‘Y’ means that the two items must belong to the same collection to be considered *like*.

## 48.6. Booking Request Checks

The ADM library’s `tab/tab_hold_request` table sets the checks to be performed by the system when a booking request is placed. Column 1 defines when the check will be performed:

- BK-PRE is used for the 'Booking' link when the list of items is displayed in the Web OPAC
- BK-POST is used when submitting the booking request form in the Web OPAC
- BK-CIRC is used when a request is submitted in the Circulation client
- AB-PRE is used when the list of items is displayed in the Web OPAC. Passing this check is required to show the 'request' link next to advance booking items
- AB-POST is used when submitting an advance booking request from the OPAC or from the GUI.
- REALLOC-AB is used when any booking request is reallocated to another like item.

If a check that requires patron information is used as a PRE check, then the patron must first be identified, and you must set `check_hold_request_1` as a PRE check as well.

When setting which checks to use, take into account the system resources required for checks that are made when the items list is displayed (PRE checks). If the checks require comparing item records and existing requests, and if there are many item records, this can create an undesirable load on the server. If a check is listed for PRE, it need not be listed for POST, since the POST scenario will not happen. Checks that relate to the patron usually appear in POST.

CHECK	Action	<code>\$aleph_root/error_lng/ check_hold_request</code>	Suggested use
booking_a	If tab15 col. 16 = N item can not be booked	1210	BK-PRE, BK-CIRC

CHECK	Action	\$aleph_root/error_lng/ check_hold_request	Suggested use
booking_b	Checks if tab37_booking_pickup and tab37_booking_delivery return empty list.	1106	BK-PRE, BK-CIRC
booking_c	Item cannot be booked if the same tem is already booked by the same patron at the same day and Z305-MULTI-HOLD=N.	1222	AB-POST
booking_e	Booking span is longer than the defined loan period for this item. This check is hard coded in requests that are submitted from the Web.	1251	BK-CIRC
booking_h	tab16 col.26, maximum number of booking requests per Sub Library and Item Status	1330	BK- POST, BK-CIRC
booking_h_1	tab16 col.26, maximum number of booking requests per Sublibrary & Item Status.  This check is similar to check_booking_request_h, but also includes in the check existing loans that were originally booking requests.	1330	BK- POST, BK-CIRC
booking_k	Checks if the booking period complies with tab15 policy. For example, if the booking request is during the night, tab15 must allow it	1342	BK- POST, BK-CIRC
booking_l	tab_booking, Col8: max_booking_start_date. Limits how far into the future bookings can be made.	1310	BK- POST, BK-CIRC
booking_q	tab16 - Limit of Bookings per Sublibrary	1311	BK- POST, BK-CIRC
booking_q_1	tab16 - Limit of Bookings per Sublibrary  This check is similar to check_booking_request_q, but also includes in the check existing loans that were originally booking requests	1311	BK- POST, BK-CIRC

CHECK	Action	\$aleph_root/error_lng/ check_hold_request	Suggested use
booking_r	patron expiration date has been reached	1320	BK- POST, BK-CIRC
booking_t	tab16 col.13 check for maximum number of hold requests for the ADM library (ADM line(s) in tab16)	1312	BK- POST, BK-CIRC
booking_t_1	tab16 col.26 check for maximum number of booking requests for the ADM library (ADM line(s) in tab16)  This check is similar to check_booking_request_t, but also includes in the check existing loans that were originally booking requests.	1312	BK- POST, BK-CIRC
booking_x	tab16 - Limit of Bookings per Sublibrary Group	1313	BK- POST, BK-CIRC
booking_x_1	tab16 - Limit of Bookings per Sublibrary Group  This check is similar to check_booking_request_x, but also includes in the check existing loans that were originally booking requests.	1313	BK- POST, BK-CIRC
hold_1	patron-id has not been entered	1140	BK-PRE

The text of messages associated with the checks is defined in \$aleph\_root/error\_lng/ check\_hold\_request.

## 48.7. Booking Request Default Times

The default times that are related to a booking request are set in the ADM library's tab/tab\_booking table. These are set per sublibrary, item status and material type. The following times are set:

- **Head Time and Tail Time** – these are the times that will be added at the beginning and end of a request for request preparation purposes. The format of these columns is [M/H/D]nnn, where 'M' stands for minutes, 'H' stands for hours and 'D' stands for Days. nnn is a three digit number that sets the amount of time that will be used. Note that these are default times and that they can be overridden by a staff user.

- **Release Time** – This is the length of time that passes from a request becoming active that will release the item to be loaned to patrons other than the booked one. The format of this column is [M/H/D]nnn, where ‘M’ stands for minutes, ‘H’ stands for hours and ‘D’ stands for Days. nnn is a three digit number that sets the amount of time that will be used. Note that these are default times and that they can be overridden by a staff user.
- **Delete Interval** – This is the length of time before a request becomes active, up to which the patron will be able to delete his request. After this time deleting a request by the patron will not be possible. The format of this column is [M/H/D]nnn, where ‘M’ stands for minutes, ‘H’ stands for hours and ‘D’ stands for Days. nnn is a three digit number that sets the amount of time that will be used. Note that these are default times and that they can be overridden by a staff user.
- **Time in Advance** – This is the latest time in the future for which a patron can place a request. Placing a request beyond this time is not possible. The format of this column is [D/W/M/Y]nnn, where ‘D’ stands for days, ‘W’ stands for weeks, ‘M’ stands for months and ‘Y’ stands for years. nnn is a three-digit number that sets the time that will be used.
- **Preview Period** - This is the amount of time in advance that a booking can be executed. For example, if the booking period is between 12:00 and 18:00, and this time is defined as 5 minutes, the patron can execute the booking starting from 11:55. The column format is [M/H/D]nnn, defining minutes, hours or days.

#### Note

These times are used also for advance booking requests.

## 48.8. Delivery and Pickup Location Policies

Booking functionality includes an option to request that the material be transferred to another location. Two types of transfer are provided for:

Pickup – that is, the service desk of library in the system (including the location of the item)

Delivery – that is, transfer to a non-library location, such as a classroom

Delivery/Pickup location policies are set in tab37\_booking\_delivery and tab37\_booking\_pickup tables.

### 48.8.1. tab37\_booking\_pickup

The ADM library's tab/tab37\_booking\_pickup table sets which pickup locations can be requested, based on the item's sublibrary, item status, item process status, item material type and patron status. Pickup locations must also be defined as sublibraries in the ./alephe/tab/tab\_sub\_library.lng table. Up to ten pickup locations can be set in each row. If more than ten pickup locations are required, the list can be continued in the next row, leaving columns 1-5 empty.

For example:

WID 01 IP 03 WID LAW LIB1 LIB2 LIB3 LIB4 LIB5 LIB6 LIB7 LIB8  
LIB9 LIB10

### 48.8.2. **tab37\_booking\_delivery**

The ADM library's `tab/tab37_booking_delivery` table sets which delivery locations can be requested for a sublibrary, item status, item process status, item material type and patron status. The locations must also be defined in the ADM library's `tab_delivery_locations.lng` table

#### **Note**

You can define that all of the delivery locations in `tab_delivery_locations.lng` are valid delivery locations for a specific sublibrary, item status, item process status, item material type and patron status. This is done by setting column 6 of `tab37_booking_delivery` to '\*'.

Up to ten delivery locations can be set in each row. If more than ten delivery locations are required, the list can be continued in the next row as is described for `tab37_booking_pickup` above.

### 48.8.3. **tab\_delivery\_locations.lng**

The ADM library's `tab_delivery_locations.lng` table lists the codes and addresses of the delivery locations that are allowed by the ADM library. The delivery location codes that are used in `tab37_booking_delivery` must be defined in this table.

### 48.8.4. **tab27**

Delivery handling settings are defined in the ADM library's `tab/tab27` table. This table sets how deliveries are handled per sublibrary, item status and pickup location. Settings 06, 07, and 08 in column 5 define actions that are applied to booking requests.

06 in column 5 defines that when delivery is performed, the item is immediately loaned to the requesting patron. If option 08 is used, then a reading room record will also be created. Setting 07 in column 5 means that upon delivery, the item will be placed in transit to the pickup location and will be loaned to the patron only upon arrival to the pickup location. Note that these are the only options for a booking request. Also note that this table is used also for hold requests, and column 1 differentiates between the two request types ('H' means hold requests and 'B' means booking requests).

## 48.9. **Cash Transactions**

The following cash transactions are defined in the ADM library's `tab/tab18.lng` table for booking requests:

0091 - Booking Request Created

- 0092 - Booking Request Filled (loaned)
- 0093 - Booking Request Delivered
- 0094 - Booking request not filled (not picked up)

These can set to be either active or non-active, like all other defined transactions.

## 48.10. Policy of a Booking Request Fulfillment

Booked items can be loaned out by using the Booking nodes **Loan** button. In this case, the loan is always considered a fulfillment of the booking request. If the loan is made from the loan tab and it is made within the preview period of the booking request as set in `tab_booking`, it will also be considered as a booking request fulfillment. However, if the loan is made from the loan tab and the loaning patron has a booking request which is not in its preview period, the `tab100` variable `OVERLAP-BOOKING`, will set the system behavior. You can set up the following options:

- 01 = Extends loan until end of Booking Period. Considers it a booking request fulfillment
- 02 = Deletes booking request and executes loan regularly using the calculated due date
- 03 = GUI functionality: Allows staff to choose between option 01 and option 02. An offline loan, such as Self-check, X-Server or Web and batch renewals: the same as option 01.
- 04 = GUI functionality: the same as option 03 (for GUI). An offline loan, such as Self-check, X-Server or Web and batch renewals: the same as option 02.

### Note:

`Tab100 OVERLAP-BOOKING` is consulted only if the booking end time is later than the calculated loan due date. If the booking end time is earlier than the loan calculated due date (based on `tab16`) – than `tab100 OVERLAP-BOOKING` is ignored. In this case, the due date will be the booking end time.

## 49. Displaying Item Information

The format of the Item Information and the Circulation Summary that are displayed in the Items tab of the Circulation module is defined in HTML-like files. These files, called `item-expand` and `item-current-summary`, are found under the `pc_display_lng` directory that is found under the ADM library's root directory. They can be easily configured to change and format the data that is displayed. These files are also used for item information display in the Cataloging module Items tab and in the Acquisitions module Orders and Serials tab.

When the `tab100` variable `ITEM-BOR-INFO-CIRC-ONLY` is set to 'Y', separate files are required for the Circulation module and the Acquisitions and Cataloging module, so that patron information will be displayed only in the Circulation. For this purpose two separate files exist. The file `item-expand-no-bor` is used to display the `item-expand` information without patron information, and `item-current-summary-no-bor` is used to display the `item-current-summary` information without patron information.

## 50. Patron Direct Queue

Patron Direct Queue (PDQ) is the name of ALEPH's direct consortial borrowing function. This chapter describes the configuration required to optimize its capabilities.

The following are prerequisites for using PDQ:

- All the institutions must share a single ALEPH catalog (single BIB), which is either Union View, or which has shared bibliographic records.
- There must be unique item barcodes across all participating libraries.
- The participating institutions must have defined their patrons as shared.
- Patron IDs must be unique across the participating institutions.
- There must be cross-institution agreements on the meaning of the patron statuses of the shared privileges records.

### 50.1. Patron Consortium Privileges

#### 50.1.1. Creating the Consortium Privileges

A patron is given a single general ALEPH privileges record, which is used by all of the sublibraries in which the patron does not have specific privileges.

Use of the ALEPH privileges depends on a sublibrary's definitions in columns 9-13 of `alephe_tab/tab_sub_library`. If the sublibrary defines ALEPH in one of these columns, then the ALEPH local privileges record is used according to the hierarchy defined in this table. A sublibrary can define in this table that if no sublibrary privileges record is found, the ALEPH privileges record is used. Another sublibrary can require explicit registration in the sublibrary by omitting ALEPH from columns 9-13 of `tab_sub_library`. Such a sublibrary will give circulation privileges only to patrons that have explicitly registered in the sublibrary.

Note that ADM-level privileges (the ADM local privileges record) are granted automatically when a patron registers in a sublibrary. The exact privileges that will be granted in this record depend on the matching line that is defined in `tab31`.

A patron is granted consortium-wide privileges when registering in any of the consortium's sublibraries by being granted privileges in the ALEPH local privileges record. Receiving the ALEPH privileges depends on the following:

- Column 22 of `tab31` – You can use this column to determine, for every patron status, whether or not registration in the sublibrary also grants ALEPH privileges, and thus consortium-level privileges. For example, an line of:

```
WID 10 Y Y Y N Y Y Y N F + M 00000006 9999999999 N Y Y 21 Y N Y
```

Means that whenever a patron registers in sublibrary WID with a status of 10, an ALEPH local privileges record is created.

- `tab_map_privileges` – This table defines which ALEPH patron statuses are given to every patron that registers in a sublibrary. For example, this table can define that a patron that registers in the Medicine Library is granted ALEPH

privileges with status 01 and a patron that registers in the Humanities Library is granted ALEPH privileges with status 02.

For example, a line of:

```
WID 10 04
```

Means that whenever a patron with status 10 registers in sublibrary WID, the ALEPH record that will be created will have the status 04.

ALEPH privileges should use an agreed range of patron statuses. The same range should be used by all of the participating institutions, and the meaning of each status should also be agreed on by all of the participating institutions. These statuses should be added to the circulation policy tables of all institutions

For example, all institutions agree to use statuses 01-04 for ALEPH patron privileges. They all agree that 01 is 'First Year Student'. Each library can then define the specific privileges for a first year student who is not registered within the institution (and is therefore using ALEPH 01 privileges) according to its own policies. See *50.2 Setting the Library's Policies* below.

- The privileges that a patron will be granted in the ALEPH record depend on the tab31 definitions that are defined for the new patron status (as defined in tab\_map\_privileges) and for ALEPH. The tab31 table that is used is the one that belongs to the ADM library in which the registration was made. For example, the line:

```
ALEPH 04 N N N N Y Y Y N F + M 00000006 9999999999 N Y Y 21 Y N Y
```

Defines the privileges that an ALEPH record with status 04 will be granted.

Note that the Automatic Creation of ALEPH Z305 Records (cir-83) batch job may be used to automatically open up ALEPH Z305 records after the above described setup has been done.

## 50.2. Setting the Library's Policies for PDQ

### 50.2.1. Setting Library Global Policies

The patron privileges record that is used when the patron circulates sublibrary items is defined in the alephe/tab tab\_sub\_library.lng table. Columns 9-13 of this table define a hierarchy of sublibraries. For example, the following line:

```
MED 1 USM50 L Medicine Library 15A 16A 17A MED ALEPH
```

Means that when a patron accesses an item that belongs to the Medicine Library, he must have MED privileges or ALEPH privileges. A line such as

```
MED 1 USM50 L Medicine Library 15A 16A 17A MED USM50
```

Means that the patron must have MED privileges or USM50 privileges. In this example, the sublibrary does not use ALEPH privileges, so that patrons of other ADM libraries may not have access to MED items. This can be used by sublibraries that do not want to allow patrons of other libraries to access their collection.



### 50.2.2. Setting Patron-specific Policies

A sublibrary may want to share its resources with other libraries, but restrict the resource sharing to specific item collections or to specific patron statuses, or apply special due date and fine policies to external patrons. This is managed by configuring tab16 to force the special policies, as described below.

As mentioned above, the ALEPH cross-institution patron privileges use an agreed range of privileges. For example, if an agreement has been made that the statuses 01-04 are used for ALEPH privileges, each institution and sublibrary is responsible for avoiding the use of these statuses for their own patrons. To enable this, you can define a special line for non-local patrons. For example, a tab16 line of:

```
16A  ## ## 04 + 00000024 03 A 2400 0000 00050 000 000 D + 00000014 A  
2400 007 014 05
```

will block all external patrons with status 04 from loaning and requesting items. This is because this line refers to patron status 04, which is always an ALEPH status, and it sets columns 12 and 13 so that the maximum number of loans and requests is 0. If loans are allowed, special due dates can be set in this line, forcing separate due date policies for local patrons and for external patrons.

## 50.3. Creating a Title Request

### 50.3.1. The Pool of Items

When a title request is created, any item that belongs to the requested title may potentially fulfill the request. The pool of items that may potentially fulfill the request includes items that match the following conditions:

- The items belong to the requested title. This can be items that belong to one ADM library, items that belong to multi-ADM libraries that share the same bibliographic record, or items that belong to multiple bibliographic records that are united in a Union View.
- The items share the same enumeration and chronology information, and have the same material type.
- The items are available according to the 'TITLE-REQ' section of tab\_hold\_request. Note that if the items belong to more than one ADM library, each item will be checked according to the tab\_hold\_request table of its owning ADM library.
- The item may be sent to the requested pickup location. This is determined in the tab37 table of the owning ADM library. Correct configuration of the pickup location table is explained in [50.3.2 The Pickup List](#) section below.

### 50.3.2. The Pickup List

#### Setting the Allowed Pickup Locations

The title request form displays a list of the pickup locations that the patron may choose from. The pickup location list is a union of the pickup locations of all of the items in the pool of potential items, as explained above.

Any ADM library can locally control two variables that affect the pickup location list:

- Where its own items may be sent to. This can be sensitive to the type of item and the status of the requesting patron.
- Which sublibraries in the ADM library can serve as pickup locations for items that belong to other ADM libraries.

Setting the pickup location list is done in the ADM library's tab37 table. A sublibrary can define that all of its items can only be picked up within the sublibrary. For example, if LB50A and LB50B are sublibraries in USM50:

```
LB50A ## ## ## # LB50A
LB50B ## ## ## # LB50B
```

These lines mean that LB50A and LB50B allow their items for pickup only within the sublibrary. If the requested title has items in LB50A and in LB50B, both will be displayed as pickup locations. If the patron selects LB50A, only the LB50A items can fulfill the request.

A sublibrary may also decide that certain patron statuses may request special items for pickup in another ADM. For example:

```
LB50A 01 ## 02 # LB50A LB51A
LB50A ## ## ## # LB50A
LB50B ## ## ## # LB50B
```

This means that patrons with status 02 may request LB50A items with status 01 for pickup in a sublibrary that is in another ADM; in this case, in LB51A which is a sublibrary in USM51. If the title has items in both LB50A and LB50B, the LB50A item has a status of 01, and the patron has a status of 02, the pickup location list will be LB50A, LB51A, LB50B.

The sublibrary may leave the work of defining the pickup locations that are available in another ADM library to the pickup ADM library. In other words, instead of USM50 having to define LB51A, which is a USM51 sublibrary, as an available pickup location for its items, it may simply define that USM51 is an available pickup library, USM51 will define, in its own tab37, which of its sublibraries may serve as pickup locations for items that have been transferred from USM50.

For example:

```
LB50A ## ## ## # LB50A USM51
LB50B ## ## ## # LB50B
```

This setup means that the LB50A may be picked up in USM51. USM51 may define which pickup locations are allowed for USM50 items by setting its tab37 table as follows:

```
USM50                LB51A
```

Note that columns 2-5 are spaces and that column 1 is the code of the owning ADM. This line means that items that belong to USM50 and are allowed for pickup in USM51 may use LB51A as a pickup location. The allowed pickup locations will therefore be LB50A, LB51A, LB50B, as in the previous example.

USM51 may also define which pickup locations are allowed for USM50 items by setting its tab37 table as follows:

This setup means that all items that do not belong to USM51 and that are allowed by their owning library for pickup in USM51 may use LB51A as a pickup location.

Another parameter that affects the pickup location list is the tab100 variable PICKUP-LIST-METHOD. If this variable is set to 2, the only allowed pickup location will be the sublibrary that is defined as the patron's dispatch library. This pickup location must still be allowed by the tab37 definitions, as described above.

### Paging Rules

Paging rules are another consideration in creating the pickup list. This means that a library may be defined not to be used as a pickup location if an item is available at the sublibrary. This policy definition is achieved by omitting the sublibrary from the tab37 line that has Y in column 5. For example:

```
LB50B ## ## ## N LB50C LB50D LB50B
LB50B ## ## ## Y LB50C LB50D
```

This setup means that sublibrary LB50B cannot be a pickup location if there is an available item in LB50B. If an available item exists in sublibrary LB50B, the pickup location LB50B will be removed from the list of possible pickup locations.

### Dispatch Library as Single Pickup Location

The pickup location list may be narrowed down to allow only a single pickup location for every patron. To do this, set the PICKUP-LIST-METHOD tab100 variable to 2. In this case, only the patron's dispatch library, as defined in the patron's global record, will be an allowed pickup location. In order to activate this functionality, the HOME-LIBRARY field in the GLOBAL PATRON INFORMATION (z303) record should contain the ADM library in which the patron is registered.

### 50.3.3. The Roster

The setup of the roster defines the order in which the potential suppliers are added to the queue.

The roster is defined in terms of groups. In other words, a few groups of potential suppliers can be defined for a specific pickup location. If a title request specifies a given pickup location as the desired pickup location, all of the potential suppliers in the groups are added to the roster. As each group is assigned a priority in column 2, all of the suppliers in the first group are added before all of the suppliers of the second group. Ordering within a group can either be random or subject to pre-defined ordering, depending on the setup of column 3. The roster is set in the tab\_roster table.

For example:

```
SUB1 01 Y SUB2 SUB3
SUB1 02 N SUB4 SUB5
```

This setup means that for a title request that specifies SUB1 as a pickup location, the potential suppliers SUB2 and SUB3 will always come before SUB4 SUB5. This is because SUB2 and SUB3 belong to group 01 while SUB4 and SUB5 belong to group 02. Yet, while the order in which SUB2 and SUB3 will be arranged is random, SUB4 will always come before SUB5. This is because group 02 is defined in column 3 as

non-random. This means that for a request in which SUB1 is the pickup location, the roster may be one of the following:

SUB2 SUB3 SUB4 SUB5

SUB3 SUB2 SUB4 SUB5

Note that all of these potential suppliers will be added into the roster only if they have available items that are connected to the requested title. This means that if SUB3 does not have a available item the roster will be created as:

SUB2 SUB4 SUB5

Also note that the potential suppliers (columns 4-13) may be either ADM libraries or sublibraries. If ADM libraries are defined then only one item from that ADM will be put in the queue. If sublibraries are used then all of the sublibraries that have matching items will be put in the queue, creating multiple slots in the queue that belong to the same ADM but to different sublibraries.

The `tab_roster` table may be defined either in `alephe_tab` or in the `data_tab` of the ADM library of the pickup location.

Note that if a supplier is willing to send an item to the desired pickup location (as defined in its `tab37` setup) but is not defined in the pickup location's roster in `tab_roster`, the supplier will be added as last in the queue.

#### **50.3.4. Creating the Request**

A title request can be created only if the patron has not exceeded the title request limit that has been defined in the patron's global record.

When a title request is submitted, the checks that are defined in the `TITLE-REQ` section of the `tab_hold_request` tables are performed. Each item is tested with the checks that are defined in this section of the item's ADM library table. Roster stops will be placed only on items that pass the checks.

### **50.4. Fulfilling the Request**

When an item is transferred to a pickup location that is not the sublibrary of the item, the patron may be notified either when the item is sent from the owning sublibrary or when it arrives at the pickup location. This is determined by the value of the `tab100` variable `HOLD-FULFILL-NOTIFY`:

- If the variable is set to 1, the system will notify the patron that the request has been fulfilled only when the item arrives at the pickup location
- If the variable is set to 2, the system will notify the patron that the request has been fulfilled when the item is sent from the owning library.

### **50.5. Loan and Return Anywhere**

Where PDQ prerequisites are fulfilled, an item may be loaned and returned anywhere in the consortium. The `tab_attr_sub_library` table governs a circulation station's cross-institution loan and return permissions just as it governs a circulation station's permissions for loans and returns within the ADM library. Cross-ADM loan-return

permissions can be defined at either the ADM or at the sublibrary level. For example, for a station that belong to USM51 to be able to loan and return items that belong to WID sublibrary of USM50, the following setup is possible in the USM51 setup of tab\_attr\_sub\_library:

```
*.*.*.*      1 LINC5 GDOC5   WID
              3 LINC5
```

Or

```
*.*.*.*      1 LINC5 GDOC5   USM50
              3 LINC5
```

## 50.6. Staff Permissions

The following permissions control staff privileges to PDQ functions:

- CIRCULATION / TITLE-REQ-DELETE - Permission to delete title requests
- CIRCULATION / Circulation TITLE-REQUEST – Permission to create title requests
- CIRCULATION / Circulation CROSS-INST-RETURN – Permission to return an item not in its owning library
- CIRCULATION / Circulation CROSS-INST-LOAN – Permission to loan an item not in its owning location
- CIRCULATION / TITLE-REQ-UPDATE – Permission to update a title request.

## 51. Managing Lost Items

The following configurations may be used to set the library's policies with regard to lost items.

### tab34

tab34 computes the charges for an item which is declared "lost" either through the LOST function on the Loans tab of the Patron Information in the Circulation module, or as a result of the services Overdue and Lost Billing Notices (cir-50) and Overdue and Lost Billing Summary Letter (cir-51). The table sets the default Notice Cost, Handling Cost and Fixed Price per:

- Sublibrary
- Item Status
- Collection
- Patron Status
- Call Number or Call Number Range
- Item Material Type

The table may be set to use a Fixed Price that is defined in the lost item's record (Z30).

### **tab18**

The table may be used to switch the Notice Cost, Handling Cost and Fixed Price on or off. In addition, other parameters such as VAT rates may be set in this table. Additional charges for lost items that have been previously recalled may be set by using the transaction types 0054 and 0055 and the OVERDUE-RECALL-RATIO tab100 variable (see below).

### **tab35 and tab\_circ\_log.lng**

These tables may be used to configure the Circulation Logger (Z309) events and statistic events (Z35) that are created when an item is declared lost.

### **Tab100**

The LOST-PROC-STATUS variable may be used to remove a 'lost' process status automatically when the lost item's barcode is scanned into the Circulation system.

The REFUND-RATE variable may be used to set what percentage of the lost charges will be refunded when a lost item is eventually checked it.

The LOST-LOAN-CREDIT-METHOD variable may be used to determine which cash transactions are refunded when a lost loan is eventually returned, and whether the refunding method will be by creating balancing credit charges or by waiving existing debit charges.

The LATE-RET-FINE-WHEN-LOST variable may be used to set whether overdue charges will be charged when the lost item is declared lost or only if and when it is eventually checked in.

### **Circ.ini**

The `LostReturn` parameter in the `[ErrorAction]` section may be used to set and audio warning if an item that is being checked in has been previously declared lost.

The `ManualReplacement` parameter in the `[Lost]` section may be used to control whether the Fixed Price may be manually amended by the librarian when the item is declared lost.

## **52. SMS Messaging**

ALEPH Circulation module may be configured to send SMS messages to library patrons in one of the following instances:

- Patron hold request is fulfilled.
- Overdue letter is sent to patron.
- An item that is on loan to a patron is recalled

**Note:** Sending SMS messages depends on configuring and activating the SMS Server. Please relate to SMS Proxy documentation for information on the required configurations for the SMS Server.

## 52.1. Sending SMS from ALEPH

The SMS message are sent when the relevant printout is created if:

- The patron has a valid SMS number in his patron card. The SMS number may be input using the Address Information form of the Circulation GUI or using the Patron Registration and Address Information forms in the Web OPAC.
- The patron has agreed to receive SMS messages. The patron agreement is registered in the Global Patron Information and Patron Registration forms of the Circulation GUI, or in the Patron Registration and Address Information forms in the Web OPAC.
- The library has configured the form to trigger an SMS message, as described below.

The SMS related library configurations are:

1. In `aleph_start`, the location of the SMS server must be configured. For example.

```
setenv server_sms "10.1.235.14:1894"
```

2. In the ADM library's `data_tab` directory, the `form_sms` table is used to set which forms will trigger SMS sending. The following forms currently support SMS sending:
  - `hold-request-letter-xx`. The `xx` is the hold request send action.
  - `loan-recall-x`. The `x` is the recall letter type (1 or 2).
  - `overdue-letter-x`. The `x` is the optional letter number.
  - `overdue-summary-x`. The `x` is the optional letter number.
  - `overdue-sum-single-x`. The `x` is the optional letter number.

The table includes the following columns:

Column 1 – Name of the form

Column 2 – The form number

Column 3 – The SMS text number. This number must be aligned with the codes used in the `$aleph_root/error_lng/sms_messages` table, as described below.

Column 4 – Whether or not the SMS message will be sent

3. In the \$aleph\_root/error\_lng directory, the sms\_messages table includes the SMS messages text. Column 1 of this table is the message text, and must be aligned with the code that is used in column 3 of the \$data\_tab/form\_sms table.
4. If fee charging is required, tab18.lng must be set with the relevant charge. The SMS charge is 0072.

## 52.2. Sending SMS by Using Third Party SMS Servers

Third party SMS servers may be used for the actual SMS sending. If the \$data\_tab/form\_sms and the \$aleph\_root/error\_lng/sms\_messages are set up as explained in the previous chapter, a <sms-message> tag will be created in the printout XML file. This text, along with the <z302-want-sms> and <z302-sms-number> tags information, may be used to activate third party SMS servers for the purpose of sending SMS messages.

## 53. Patron Name in Japanese – Kanji and Katakana

This chapter describes the following activities for using patron names in Kanji and Katakana:

- Storing patron name in Kanji and Katakana
- Sorting patron name list in Kanji
- Searching for patron name in Kanji and Katakana

### 53.1. Storing Patron Name in Kanji and Katakana

The patron record can maintain patron names in both Kanji and Katakana.

**Kanji** – The patron name is stored in Patron Record: Name field, Z303-NAME, in segmented Kanji.

**Katakana** – The patron name is stored in Patron Record: Salutation field, Z303-SALUTATION, in segmented Katakana.



The patron Name (Kanji) is a mandatory field. Users cannot register/update a patron record without populating the Patron Name field.

The Salutation field (Katakana name) can become a mandatory field upon setting up a system variable located in `./alephe/aleph_start`:

```
setenv JAPANESE_ENABLED TRUE
```

The variable can be set to the values FALSE (default) or TRUE. Setting the variable to TRUE enables special Japanese features such as defining the Patron's Salutation field as a mandatory field.

Upon setting this variable, users cannot register/update a patron record without populating the Patron Salutation field. If this field is missing, the following message is displayed: "Missing Katakana Name".

The ability to define the Salutation field as mandatory using the system variable applies for the GUI-CIRC-Patron Global Information form and Patron Loader (file-20 service).

When JAPANESE\_ENABLED is TRUE, the options to register a patron via GUI-Circ- Fast Patron Registration and the Web OPAC-Self Registration forms are disabled (make sure the fast registration flag is turned-off in `circ.ini`: `FastPatronRegistration=N`).

:

**Notes:**

- **Segmented Patron Names** – The patron names must be entered in a segmented Kanji/Katakana. The system is not capable of identifying word breaks for non-segmented phrases.
- **Katakana Name field Caption** – The library may rename the caption of the Salutation field to Katakana Name.

This can be achieved by updating the field name in the PC file `.\circ\tab\lng>window.dat`

Replace the line:

```
UserGlobalInfo.Static.Salutation #Salutation:
```

With:

```
UserGlobalInfo.Static.Salutation Katakana Name:
```

- **Letters to Patron Templates** – Some of the letters to patron template files (xsl files) include patron salutation (Z303-SALUTATION). The patron salutation string have to be cleaned-out from the XSL templates so that the Katakana name is not mistakenly quoted in the letters.

### 53.2. Sorting Patron Name in Kanji

Sorting of the patron name list is set according to the Kanji name.

The patron names list is sorted by Z303-NAME-KEY which is created from Z303-NAME - Kanji name.

The filing of the patron name for sorting purposes is applied as in the following setup:

The sorting form is created according to the BORROWER-NAME-KEY procedure as set in the following configuration tables: `tab_filing` and `tab_character_conversion_line`.

Section 55 of `./usr_library/tab/tab_filing` should be set with the instance: **BORROWER-NAME-KEY** as follows:

```
!1 2 3 4
!!-!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
55 char conv BORROWER-NAME-KEY
```

The instance **BORROWER-NAME-KEY** should be set in `./alephe/unicode/tab_character_conversion_line`

```
1 2 3 4 5
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
BORROWER_NAME_KEY ##### # line_utf2line_utf adm_name_key
```

The above sample setup activates the filing (sorting) routine of the patron name as defined in ./alephe/unicode/adm\_name\_key.

The library may activate any other filing routine by setting up other routine over BORROWER-NAME-KEY instance.

**Note:**

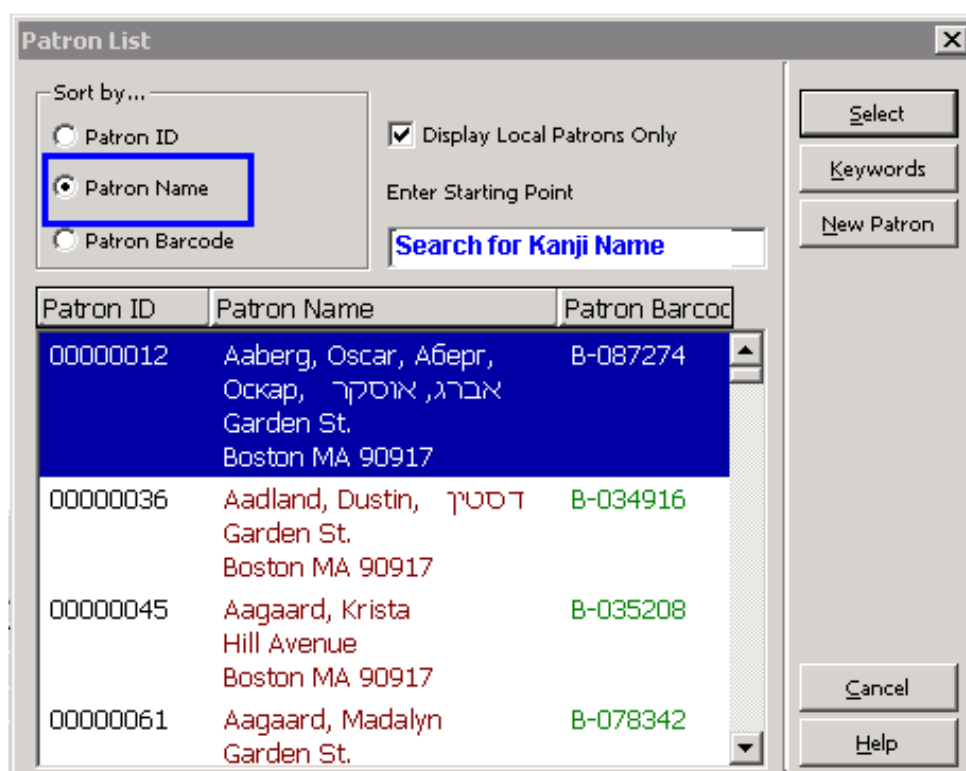
Z303-NAME-KEY length is 50 bytes; hence the sort will not distinguish between names that start with the same 16 Kanji characters.

### 53.3. Searching for Patron Name in Kanji and Katakana

The search for patron name is enabled for both: Kanji and Katakana.

#### 53.3.1. Search for Patron Kanji Name

Searching for the Kanji version of the name can be done by selecting "Patron Name" in the Patron List dialog box and entering the Kanji name in the "Starting Point" text box..



The result list is sorted according to the Z303-NAME-KEY build-up which uses on the Kanji name.

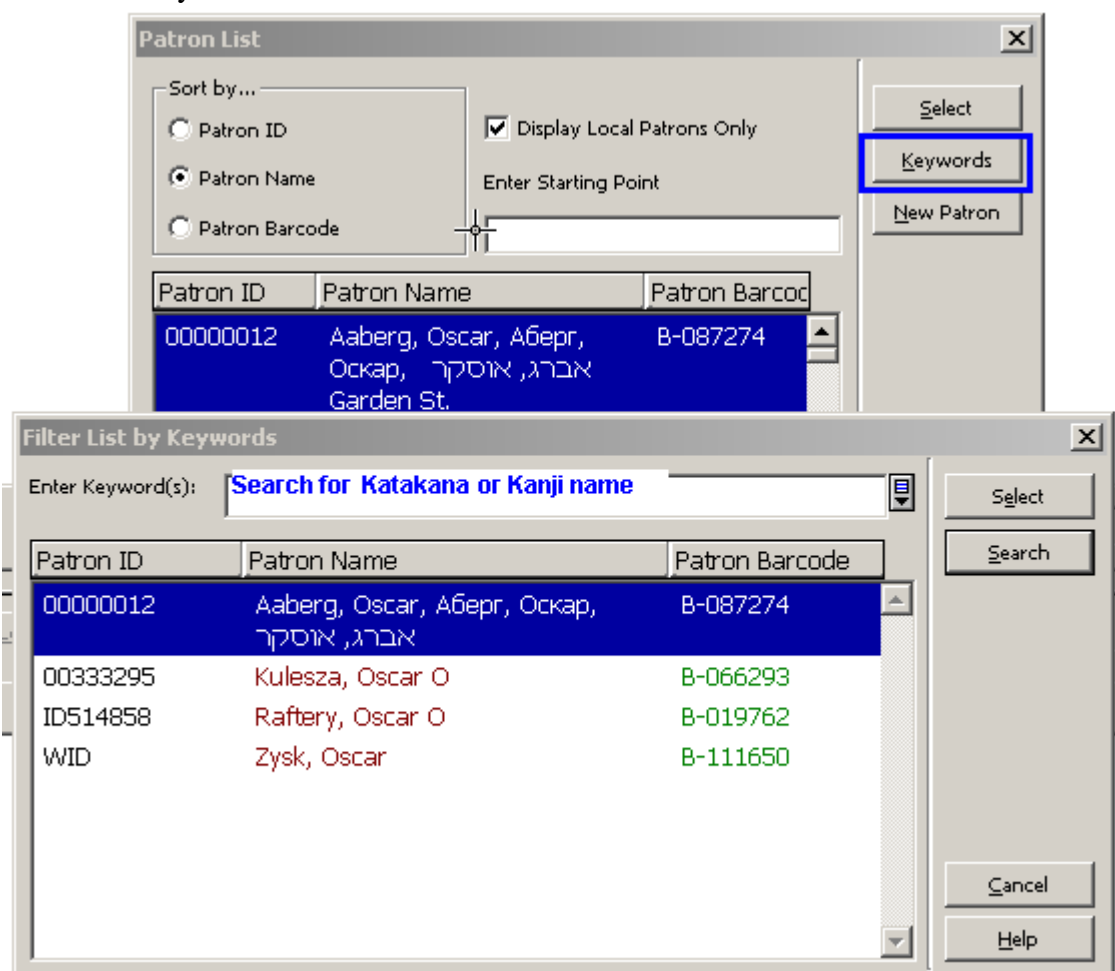
### 53.4. Patron Keywords Search – Kanji and Katakana

Searching for both Kanji and Katakana versions of the name can be performed by using the "Keywords" feature.

The Z111 keywords feature enables the indexing of keyword out of the Z303-SALUTATION field (Katakana name) and the Z303-NAME field (Kanji name).

Z111 indexes phrases included in certain Z303 fields which enables searching for any words within the indexed string (not just the "Start with" string).

Searching for the Katakana and Kanji version of the name can be done by activating the "Keywords" button on the Patron list and by typing the Katakana/Kanji name at the "Enter Keyword/s" field.



The configuration table `./alephe/tab/z111_index` enables the library to decide which fields, out of a pre-defined list of fields, are indexed and searched using Keywords.

### 53.5. Z111\_index table

`./alephe_tab/z111_index`, allows the library to set for which fields Z111 keywords are created so that only required fields are index when a record is updated or when p-manage-111 batch service is run (build keywords).

The table contains a single column:

Column 1: field to index (30 characters).

This column can contain the following fields (fields which are listed in column 1 are indexed and available for "Keywords Search"):

Z303-NAME  
Z303-SALUTATION  
Z303-PROXY-FOR-ID  
Z303-PRIMARY-ID

Z308-KEY-DATA

Z304-ADDRESS  
Z304-ZIP  
Z304-EMAIL-ADDRESS

Z310-BARCODE  
Z310-ID

Z13-TITLE  
Z13-AUTHOR

Z70-VENDOR-NAME  
Z70-VENDOR-CONTACT  
Z70-COUNTRY  
Z70-MATERIAL-TYPE  
Z70-ADDITIONAL-VENDOR-CODE  
Z70-CONTACT-5

Z700-REC-KEY  
Z700-NAME  
Z700-GEN-INFO

Z76-EXTERNAL-BUDGET  
Z76-CURRENCY  
Z76-NAME  
Z76-DEPARTMENT

Z72-VENDOR-ADDRESS

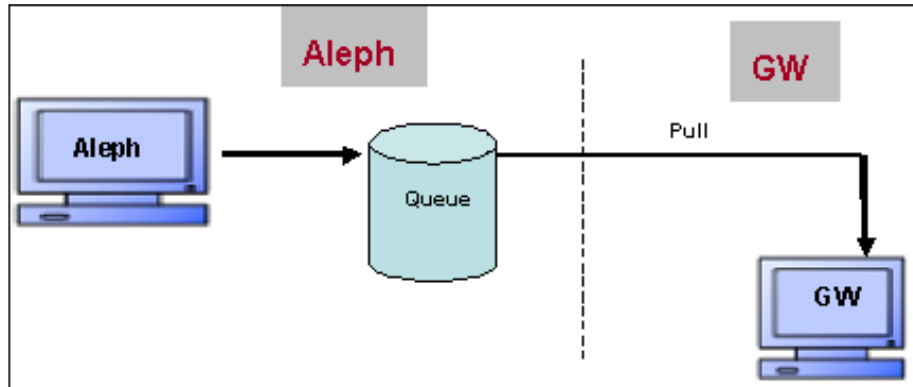
For the patron record, it is highly recommended to index only the Kanji and Katakana versions of the name (Z303-NAME and Z303-SALUTATION) and disable the indexing of other fields (e.g. Z304-ADDRESS), as indexing of other fields introduces inconsistent noises.

## **54. Aleph – Gateway Compatibility**

A library may employ a third-party gateway system that controls patron access to library services. Aleph is capable of making information available to be used by the gateway system. This information is stored in the Oracle Advanced Queue, which resides in the Aleph database (Z502).

Aleph only makes the information available. The gateway system is responsible for accessing the information from the Aleph queue, analyzing it according to its own criteria, and determining whether to allow or block access to a patron.

The following diagram illustrates the architecture of **the** Aleph-Gateway compatibility:



### 54.1. Events that Trigger Messages for the Gateway

Aleph can be configured to have the following circulation events trigger a message for the gateway system.

- Photocopy (Z38) request created
- Photocopy request supplied
- Photocopy request refused
- Photocopy request deleted
- Loan (Z36) created
- Loan deleted
- Loan returned

Circulation events are recorded only for relevant users. The relevant users are set in the `usr_library` table `circ_events_users` (see details below: Activation and Setup).

Aleph can be configured to have the following user events trigger a message for the gateway system.

- User ID (Z308) created
- User ID deleted
- User barcode updated
- Local patron record (Z305) created
- Local patron expiry date changed
- Local patron status changed
- Patron's block created (Z303)
- Patron's block updated
- Patron's block deleted

### 54.2. Configuration and Activation

Z502 and 1 `aleph_q_gate`

**To configure and activate Aleph - Gateway compatibility:**

1. Create the Z502 Oracle queue table and aleph\_q\_gate:

a) Add the Z502 table to file\_list to the USR library.

For example: ./usr00/file\_list:

```
!1          2          3          4          5
6
!!!-!!!!!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!-
!!!!!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!
TAB z502          333K          0K          ts0
```

b) In usr\_library, create the Z502 Oracle Queue table, using util/a/17/7/1.

c) In usr\_library, create the aleph\_q\_gate queue in the Z502 Oracle Queue Table, using util/a/17/7/2.

d) In usr\_library, start the aleph\_q\_gate queue, using util/a/17/7/3.

Note that the name of the Oracle Queue in util/a/17/7/3 is “aleph\_q\_gate”.

**Note:**

If the Z502 Oracle queue table already exists, it can be dropped and re-created:

1. Stop the queue using util/a/17/7/4.
2. Drop the queue using util/a/17/7/5.
3. Drop the queue table using util/a/17/7/6.

2. Set the relevant users (circ\_events\_users) for which circulation events are generated by editing the usr\_library table circ\_events\_users.

The circ\_events\_users table defines the local user status and the sublibraries (Z305) for which circulation events are created. Circulation events are recorded only for users that have a local user record (Z305) in the relevant sub-library (Z305-SUB-LIBRARY) with one of the defined patron statuses (Z305-BOR-STATUS).

For example: ./usr00/tab/ circ\_events\_users

```
Column 1 - Patron local sub library (Z305-SUB-LIBRARY).
          Set ##### for all sublibraries.
Columns 2 thru 7 - Patron status (Z305-BOR-STATUS).
          Set ## for all statuses

! 1    2    3    4    5    6    7
!!!!-!!!-!!!-!!!-!!!-!!!-!!!>
MED   01 02 03 04 11 12
TML   01 02 03 04 05 06
WID   01 02 03 04 05 10
```

3. Activate www\_server and pc\_server.

## 55. Aleph and SSO Integration

Aleph is capable of storing information regarding specific events that affect a third-party Single Sign On system (SSO).

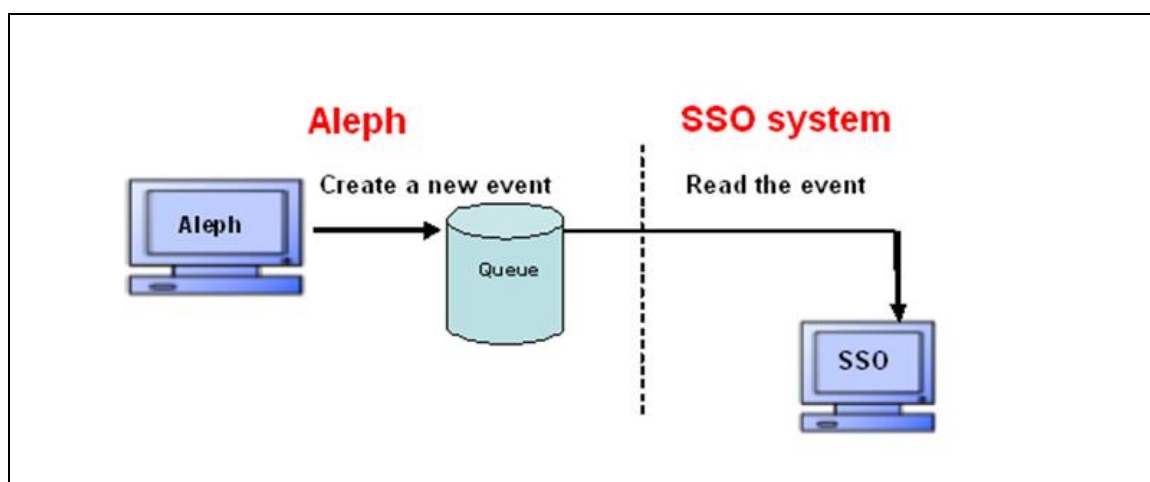
Each time one of the following actions occurs, Aleph stores the relevant patron information in the Z503 Oracle table, Relevant Actions:

- New Patron
- Update Address
- Update Password

This Z503 information is stored in Oracle advanced queue, which resides in the Aleph database.

It is the third-party SSO system's responsibility to pull the information from Aleph's queue, analyze it according to its own logics, and update the SSO data (for example, update patron name and password).

The following diagram illustrates the architecture:



### 55.1. Events that Trigger Messages for the SSO

The following is a list of patron events that can be configured to trigger a real-time Z503 message for the external SSO system.

- New Patron in OPAC/GUI (event type: NP)
- Address change in OPAC/GUI (event type: UA)
- Password change in OPAC/GUI (event type: UP)

Each Z503 reports the patron relevant data: Z303/304/305/308. Note that there are cases in which a single action triggers several Z503 records, for example, when creating a new patron record via: Circulation > Patron Menu > New Patron (or Circ > New Patron Icon) > Update button.

With the above action, the user creates a new Z303 patron record that affects the patron's password information (Z308) of type 00 and type 01; therefore two "NP" Z503 records are created, one for Z308-type 00 and one for Z308-type 01.

For Z503 record structure, refer to Oracle table documentation: Z503.



## 55.2. Activation and Setup

### Z503 and aleph\_q\_sso

To create a Z503Oracle queue table and aleph\_q\_sso:

- 1) Add the Z503 table to file\_list in the USR library.

For example: ./usr00/file\_list:

```
!1          2          3          4          5
6
!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
TAB z503          333K          0K          ts0
```

- 2) In the usr\_library, create the Z503 Oracle queue table, using util/a/17/7/1.

```
Enter library name : usr00
You asked to create from library USR00

Enter table name to Create: z503
enter yes to create z503 table for USR00 : yes
This is your last chance!!! Would you like to change your mind? no
```

- 3) In the usr\_library, create the aleph\_q\_sso queue in the Z503 Oracle queue table, using util/a/17/7/2.

- 3) In usr\_library, start the aleph\_q\_sso queue, using util/a/17/7/3.
- 4) In usr\_library, create the dequeue user, using util/a/17/7/7.

#### Note:

If the Z503 Oracle queue table already exists, it can be dropped and re-created:

1. Stop the queue using util/a/17/7/4.
2. Drop the queue using util/a/17/7/5.
3. Drop the queue table using util/a/17/7/6.

## 56. Log for Patron Record Changes

The library can record in a log changes made to the patron record, the name of the user who implemented the change, and the time and date the change was made.

The Patron Record Changes log is created as follows:

1. The log data is saved in Z307 ORACLE table Z307 which is recorded in the usr\_library.

2. The `usr_library` onfiguration table, `tab_patron_log.<lng>`, defines the actions that trigger patron log creation (Z307).
3. The circulation batch service, Patron Record Log Changes Report (cir-27), produces a report of changes made on patron records.

### 56.1. `tab_patron_log.<lng>`

`tab_patron_log.<lng>` is located in the `tab` directory of the `usr_library`. It is used for configuring the action codes (column 1) that trigger the Z307 Patron Log records and their textual description (column 3). Only the actions that are activated (column 2 = Y) can be triggered. Use column 2 to have Aleph ignore action triggers.

The following is a list of possible logs (numeric code–col.1 and text decription–ol.3):

- 001 - Update of global patron record-Details
- 002 - Update of global patron record-Blocks
- 003 - Update of local patron record-Details
- 004 - Update of local patron record-Blocks
- 005 - Update of local patron record-Privileges
- 006 - Update of patron addresses
- 007 - Update of patron IDs
- 010 - Delete of global patron record
- 011 - Delete of local patron record
- 012 - Delete of patron address record
- 013 - Delete of patron ID
- 020 - New global patron record created
- 021 - New local patron record created
- 022 - New patron address record created
- 023 - New patron ID created

Structure of the table:

- COL 1. The action type code that cause a Z307 patron change log record to be written
- COL 2. Active/Non active log: Y/N
- COL 3. Description of the action

The following is an example of the table:

```

!1 2          3
!!!-!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-!->
001 Y Update of global patron record-Details
002 Y Update of global patron record-Blocks
003 Y Update of local patron record-Details
004 Y Update of local patron record-Blocks
005 Y Update of local patron record-Privileges
006 Y Update of patron addresses
007 Y Update of patron IDs
010 Y Delete of global patron record
011 Y Delete of local patron record
012 Y Delete of patron address record
013 Y Delete of patron ID

```

020 Y New global patron record created  
021 Y New local patron record created  
022 Y New patron address record created  
023 Y New patron ID created

**Notes:**

- Only action types that are set in the table create a Z307 record.
- Each one of the actions defines a group of fields that when updated, trigger the log.
- If the table does not exist or is empty, no log is created.

## 56.2. Patron Log Record Changes Report

The patron change log actions can be reported using the Patron Record Log Changes Report (cir-27) batch service. Access this service from **Circulation Services > Patron Record**.

**Patron Record Log Changes Report (cir-27) - USM50**

\* Output File:

Patron ID:

Change Date (From):

Change Date (To):

Log Type:

- All
- Global Patron - Details
- Global Patron - Blocks
- Local Patron - Details
- Local Patron - Blocks
- Local Patron - Privileges
- Patron Addresses

Report Format:

Runtime:

At:  O'clock:

Library:

Print ID:

Report Language:

Buttons: Submit, View History, Cancel, Help,  Add to History

This service produces a report of changes made for patron records. It retrieves Z307 records from the `usr_library`.

For libraries that share the user file with other ADMs (TAB100-USER-SHARING=Y), the batch service retrieves all of the changes made to patrons that belong to the shared user environment, even if changes were triggered by another ADM library (except for logs that are related to Patron Local Record (Z305) which are retrieved only by the ADM that triggers the change).

For library that has their own user file (non-share user file TAB100-USER-SHARING=N), the batch retrieves only logs related to the library's patrons.

The service produces a report containing the log information. This information includes the Patron ID, the date and time of the change, and the user who implemented the change.

## 57. Two Patron Name Fields

Your library can use two fields to hold the patron name: Last Name and First Name (instead of a single Name field).

The functionality and interface of the two new fields depend on your library setup, so that only libraries that configure the formatted name structure can use the new functionality.

The setup is implemented by a new `./alephe/tab/tab100` flag: `PATRON-NAME-FORMAT`. If `PATRON-NAME-FORMAT` is not defined, the current single name field is used (as it is currently).

The two new fields build the Z303-NAME according to the routine set in the new TAB100 flag.

The migration of current Z303-NAME into the two new fields is done by running the new Convert Patron Name (p-com-04) batch service.

### 57.1. PATRON-NAME-FORMAT

Update the `./alephe/tab/tab100` flag: `PATRON-NAME-FORMAT` with the relevant value. This flag determines the Z303-NAME format that is created from the patron first name and last name. It is also used by the Convert Patron Name (p-com-04) batch service to convert the single name field into two name fields.

The `tab100` flag can have one of the following values:

- L F
- L, F
- L; F
- F L
- F, L
- F; L

Where F = First name, L = Last name.

## 57.2. Migrating the Current Single Name Field (Z303-NAME) into Two Name Fields

The Migrate Patron Name (com-04) batch service converts the current Z303-NAME into the two new fields. It is accessed via Services menu > Patron Records page of the Circulation module.

Libraries that want to apply the two new patron name fields should activate the batch service. The goal is to create a proper data and display of the name fields.

The batch can only be run by the library staff after migrating to Aleph 22. It can be run also at a later stage if the library decides to use the two name fields.

You only need to run the batch service once. The batch service must be run before activating the GUI and patron flows so that the two name fields are handled properly (otherwise, there will be no data in the two new name fields).

The batch service assumes that Z303-NAME data is correctly entered. The batch output file reports problematic cases that may require staff verification.

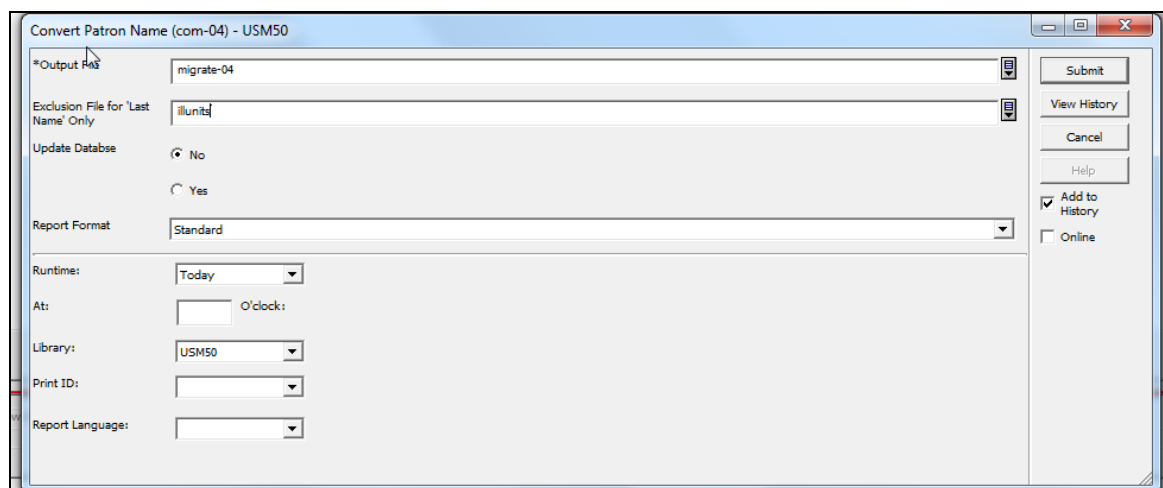
The script looks for PATRON-NAME-FORMAT (if it exists) and migrates Z303-NAME into the two new fields.

If one or more of the two name fields are already populated, the batch does not update existing data.

The migration batch service applies PATRON-NAME-FORMAT to convert Z303-NAME into Z303-FIRST-NAME and Z303-LAST-NAME.

The convert service (com-04) can be run from ADM, and it affects all the patrons in all ADMs.

The following is an example of the batch interface:



### 57.2.1. Input Parameters

**Output file:** The report output file name that contains a list of affected names (patron-name-convert.xml).

**Exclusion File for 'Last Name' Only:** Input file of patron IDs that are migrated to Last Name only, such as: ILL Unit, Administrative units, and Sublibraries. The file should be located in the ./alephe/scratch directory.

**Update Database:** Yes/No. To run the service in a preview mode, select 'No'. Select 'Yes' if you want Z303-FIRST-NAME and Z303-LAST-NAME to be updated. The batch applies the TAB100 flag: PATRON-NAME-FORMAT. If the flag is not defined or it is illegally set, and the batch is not executed, an error message is displayed: "tab100 PATRON-NAME-FORMAT is not activated".

If it is correctly set, the batch service populates Z303-FIRST-NAME and Z303-LAST-NAME according to procedure set in the TAB100 flag: PATRON-NAME-FORMAT.

If there is an input file in "Exclusion file for 'Last Name' only", the system migrates Z303-Name into Z303-Last name (leaving Z303-First-name empty). The input file should be set in advanced by the library so that Z303 records, which represent ILL Unit/Sublibraies/etc, is populated with Last name only.

If Z303-FIRST-NAME and/or Z303-LAST-NAME are already populated, there is no override. Neither field is updated. The output file includes these entries with the indication "Already populated".

The batch generates two output reports. For example, if the output file name is "patron", two reports are generated: "patron" and "patron.verify".

The "patron" file include all patrons that were successfully converted (status is "OK" or "OK-Exclusion input file"). "patron.verify" includes all patrons whose name should be verified by staff (status is "verify name" or "already populated").

The output report is sorted by patron's ID (Z303-ID).

### 57.3. Implementation Notes

1. Set the ./alephe/tab/tab100 PATRON-NAME-FORMAT flag with one of the following values:

- L F
- L, F
- L; F
- F L
- F, L
- F; L

Where F = First name and L = Last name.

2. Update alephe/www\_f\_lng/bor-new with the two new fields:

In my\_reset function:

a. **Replace:**

```
if (document.form1.elements[i].name == "M_Z303_NAME" ||
```

**With:**

```
if (document.form1.elements[i].name == "M_Z303_LAST_NAME" ||  
document.form1.elements[i].name == "N_Z303_FIRST_NAME" ||
```

b. **Add:**

```
<tr>          <td      class=td2      width=20%      nowrap><label  
for="last_name">Last Name: </label></td>  
  <td class=td2 width=1%>  
    <span class=text2 title="Mandatory">*</span>  
  </td>  
  <td class=td2>  
    <input      id="last_name"      size=30      maxlength=200  
name=M_Z303_LAST_NAME value="$3000"></td>  
</tr>  
<tr>  
  <td      class=td2      width=20%      nowrap><label  
for="first_name">First Name: </label></td>  
  <td class=td2>&nbsp;</td>  
  <td class=td2>  
    <input      id="first_name"      size=30      maxlength=200  
name=N_Z303_FIRST_NAME value="$3100"></td>  
</tr>
```

c. **Remove:**

```
<tr>  
  <td class=td2 width=20% nowrap><label for="name">Name:  
</label></td>  
  <td class=td2 width=1%>  
    <span class=text2 title="Mandatory">*</span>  
  </td>  
  <td class=td2>  
    <input      id="name"      size=30      maxlength=200  
name=M_Z303_NAME value="$0100"></td>  
</tr>
```

d. **Replace:**

```
<body topmargin="0"  
  onload="window.document.form1.reset ();  
window.document.form1.N_Z303_NAME.focus () ">
```

**With:**

```
<body topmargin="0"  
  onload="window.document.form1.reset ();  
window.document.form1.M_Z303_LAST_NAME.focus () ">
```

4. If localization is needed, add the following lines to \$Salephe\_root/error\_Ing:

- a. into pc\_com\_c0121:  
0051 0007 L tab100 PATRON-NAME-FORMAT is not activated.  
0052 0007 L Last name must be entered.
- b. into pc\_cir\_c0468:  
0050 0001 L tab100 PATRON-NAME-FORMAT is not activated.  
0051 0009 L Last name must be entered.

```
c. into www_f_heading:
  4921 L tab100 PATRON-NAME-FORMAT is not activated.
  4922 L Last Name
```

4. If localization is needed, add the following files:

- \$alephe\_root/error\_lng/p\_com\_04
- /form\_lng/patron-name-convert.xsl

5. If localization is required, add the following lines to ./alephe/pc\_b\_lng/menu-circ.xml:

```
<item>
<display>Convert Patron Name (com-04)</display>
<file>p-com-04</file>
</item>
```

6. If localization is required, add the following line to ./alephe/tab/user\_function.lng:

```
PATRON-S                L Patron Services                COM-04
L Com-04 : Convert Patron Name
```

7. If localization is required, add the following file ./alephe/pc\_b\_lng/p-com-04.xml

8. If localization is needed, add the following lines to:

./circ/tab/lng/window.dat:

```
a.   UserGlobalInfo.Static.LastName           Last Name:
     UserGlobalInfo.Static.FirstName         First Name:
b.   PatronRegDlg.Static.LastName            Last Name:
     PatronRegDlg.Static.FirstName           First Name:
./alephcom/tab/lng/window.dat:
a.   UserForm.Static.LastName                Last Name:
     UserForm.Static.FirstName               First Name:
```

## 58. Aleph Support for RFID

### 58.1. Overview

Aleph supports communication with several RFID products: Nedap, 3M, and Bibliochip (Bibliotheca).

Radio Frequency Identification (RFID) is an automatic identification method, relying on storing and remotely retrieving data using devices called RFID tags or transponders. An RFID tag is an object that can be attached to or incorporated into a product for the purpose of identification using radio waves. Chip-based RFID tags contain silicon chips and antennas.

RFID tags can be used in various implementations for attaching identification or other information to any object. Once in their receiving range, radio-enabled machines can identify the object or read other information that is attached to the object and use it a large range of purposes.

RFID tags are mainly used in libraries for the following purposes:

- Automatically identifying an item during the check-in and check-out process.



Replacing barcode scanners and other traditional methods of identifying items, an RFID-enabled circulation desk can use the RFID reader to identify the item that is on the check-out or check-in counter by reading its RFID tag. This can save the library staff the time and effort that barcode scanning entails.

- Using security gates to detect an un-authorized check-out.

RFID-enabled security gates can be placed at the library entrances. The gates can read the RFID tag of every item that comes into their radio range and detect whether or not the item has been tagged as ‘allowed for check-out’. If an item leaves the library without the RFID tag being updated, the gates will issue an alarm for the staff to act upon.

- Inventory management

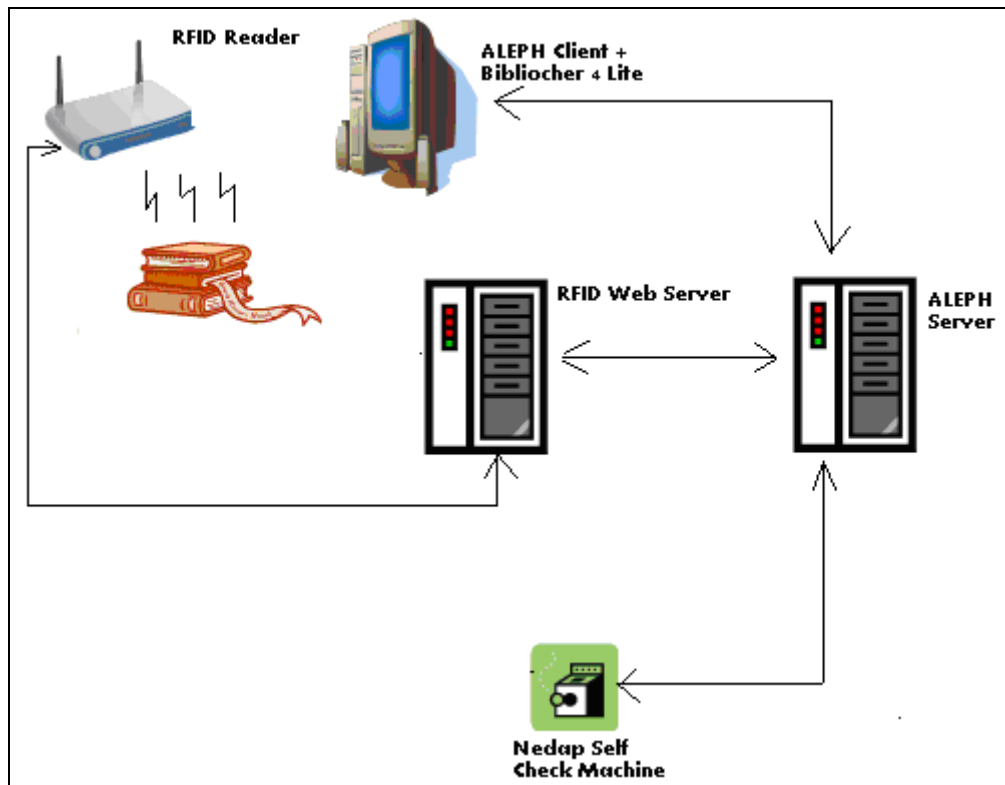
RFID-enabled machines are very helpful for processing inventory management actions. For example, automatic sorting of items can be done by RFID-enabled machines that sort items based on information stored on the RFID tags. Also, a physical inventory check can be much easier to perform if the item barcodes are read by an RFID-enabled scanner rather than a barcode scanner.

RFID tags and readers of different vendors are gaining popularity. The purpose of this document is to describe how Aleph can be set up to work with in a library that is RFID-enabled, where the RFID environment is based on one of the following RFID tags: Nedap, 3M and Bibliochip.

The RFID-Aleph connection uses the staff workstation’s serial interface and requires a proper and fully functioning setup of the RFID software. The Aleph-RFID interface is an integral part of Aleph, so you do not have to install any additional modules.

## **58.2. System Architecture**

The following diagram shows how the Aleph system and the RFID readers interact:



The following is a description of the participating elements and their relationships:

- Aleph Client + the RFID vendor software (Nedap/3M/Bibliochip)

The Aleph client station is equipped with the RFID vendor software. The vendor software is the component which updates Aleph with the information on the item that has been detected by the RFID Reader.

- RFID Reader

The RFID reader is able to read the RFID tag information that is found within its radio range and passes the information to the Aleph \RFID client. Communication with the RFID reader is done over UDP.

#### Note

For the system to work properly, only one RFID tag can be in the radio range of the RFID Reader when it is being used.

- Aleph Server

The Aleph server interacts with the Aleph client to execute the check-out\check-in actions and the item update actions. When actions that affect the RFID tag are triggered, the Aleph server updates the RFID Web Server on the details of the action and on the RFID reader that is responsible for updating the RFID tag.

- RFID Web Server

This is a server running the RFID Web Server software (Nedap/3M/Bibliochip). This server receives from the Aleph server information on where the updated RFID tag is found (that is, which RFID reader should act on the update request), and on what the update action is (enabling security bit, updating item information, and so on). The RFID Web Server triggers the write action of the RFID Reader,

and obtains success or failure information which is reported back to the Aleph server.

### 58.3. Functionality

The RFID-enabled Aleph system supports the following RFID-based actions:

- Identifying items
- Checking-out and checking-in items.
- RFID-enabled self check actions.
- Update of the RFID tags when updating the item information.

#### 58.3.1. Identifying Items

The RFID-enabled item is identified by the GUI modules in the following manner:

The Aleph client has the Bibliocheck4Lite RFID software running. The Bibliocheck4LiteSettings.xml file installed on your workstation must contain pre-defined settings such as the following in order to carry out the following actions:

#### Disclaimer

Third party products such as Nedap/3M/Bibliochip are not under the control of Ex Libris, and Ex Libris is not responsible for any changes or updates to product. Furthermore, Ex Libris is not responsible for providing any end user support with respect to Nedap/3M/Bibliochip. All end user support requests should be addressed to the product's vendor.

- Define the Bibliocheck4Lite software to connect to the RFID Reader using UDP.

```
<RfConnection>  
    UDPSocketConnection  
</RfConnection>
```

- Define the UDP location of the RFID reader.

```
<UDPSocketConnection>
  <ReaderAddress>
    IP address of the RFID Reader
  </ReaderAddress>
  <ReaderPort>
    79
  </ReaderPort>
</UDPSocketConnection>
```

- Define the Bibliocheck4Lite software to read only the tag identification.

```
<AutoMode>
  Manual
</AutoMode>
```

- Define the Bibliocheck4Lite software to always poll the RFID Reader.

```
<AutoStart>
  True
</AutoStart>
```

- Define the input string's delimiter.

```
<DelimiterString>
  \r
</DelimiterString>
```

In your Aleph GUI, the cursor is placed in the toolbar in which the item barcode is to be read. For example, if the item is required to be checked out to a patron, the Circulation Loan tab will be activated, and the patron ID will be read. Following that, the cursor is placed in the item bar.

The RFID-tagged item is placed in range of the RFID reader. The item ID is automatically read into the active bar. In the example above, the barcode that has been read by the reader is read into the Item Bar of the Circulation Loan Tab. The Aleph module workflow can continue as if the item barcode was manually scanned in.

## 58.4. Check-Out and Check-In

Whenever an item is checked out, the RFID Reader is triggered to turn off the security bit.

Whenever an item is checked in the RFID Reader is triggered to turn on the security bit.

If during the check-out or check-in actions the RFID tag has been successfully updated, the GUI can issue a success message such as:

*RFID transponder successfully updated.*

Whether or not this message is issued depends on the value of the `SuccessMessage` parameter, found under the `[RfidMedia]` section of `circ.ini`.

If during the check-out or check-in actions the RFID tag has not been successfully updated, the GUI issues an error message, such as

*Failed to update RFID Transponder.*

The error message is included in a dialog box that allows you to carry out two possible actions:

- To close the error dialog box without further action, click **OK**.
- To retry the RFID update action, by resending the message click **Retry Transponder**.

## 58.5. Self-Check

Self-check is done by using RFID-enabled self-check machines. The self-check machines can read and update the RFID tags, and update the Aleph server.

## 58.6. Registering Item Information

When updating the item, the current item's data is written to the transponder which is in range of the RFID reader.

If the RFID tag has been successfully updated, the GUI can issue a success message such as:

*RFID transponder successfully updated.*

Whether or not this message is issued depends on the value of the `SuccessMessage` parameter, found under the `[RfidMedia]` section of `circ.ini`, `catalog.ini` and `acq.ini`.

If the RFID tag has not been successfully updated, then the GUI will issue an error message, such as:

*Failed to update RFID Transponder.*

The error message is included in a dialog box that allows you to carry out two possible actions:

- To close the error dialog box without further action, click **OK**.
- To retry the RFID update action, by resending the message click **Retry Transponder**.

## 58.7. Configuring RFID- Nedap, 3M, and Bibliochip

### 58.7.1. Configuring RFID Reader Location and Vendor

The `[RfidMedia]` section in `alephcom.ini` defines the location of the station's RFID reader in the `RfidReaderAddress` variable and the system's RFID vendor in the `Vendor` variable. The possible values for the `Vendor` variable are Nedap, 3M, or Bibliotheca.

To define Nedap as the library RFID product, set the Vendor environment to the following:

```
Vendor=Nedap
```

To define 3M as the library RFID product, set the Vendor environment to the following:

```
Vendor=3M
```

To define Bibliochip as the library RFID product, set the Vendor environment to the following:

```
Vendor=Bibliotheca
```

For example:

```
[RfidMedia]
RfidReaderAddress = 10.1.235.173
Vendor=Nedap
```

## 58.8. Activating Reader and Success Messages

To activate the RFID transponder update from the Aleph client, set the `ActivateReader` parameter, found under the `[RfidMedia]` section of `circ.ini`, `catalog.ini` and `acq.ini`, to `Y`.

To issue a message indicating a successful write action to the RFID Reader, set the `SuccessMessage` parameter, found under the `[RfidMedia]` section of `circ.ini`, `catalog.ini` and `acq.ini`, to `Y`.

To add an additional RFID button to the items list, allowing the updating of the RFID tag without making a change in the item information, set the `INITIATED-RFID` parameter, found under the `[RfidMedia]` section of `circ.ini`, `catalog.ini`, and `acq.ini` to `Y`.

For example:

```
[RfidMedia]
ActivateReader=Y
SuccessMessage=Y
INITIATED-RFID=N
```

## 58.9. Configuring the RFID Web Server

Your Aleph installation contains a table, named `tab_rfid.conf`, for defining RFID settings. It is located in the ADM library's `data_tab` directory. Like `tab_ncip.conf`, the table defines RFID settings in a free `variable=value` format, for example:

```
[General]
rfid_server_address = 10.1.235.173
timeout = 060
Nedap_item_format = FrenchLabel_native
```

**rfid\_server\_address**

This variable identifies the IP address on which the RFID Web Server is found.

**time\_out**

This three-digit variable defines the number of milliseconds that the RFID Web server waits for a response from the RFID Reader before issuing a timeout.

**Nedap\_item\_format**

This variable identifies the write data format that is used when activating the RFID Web server for an item update action. The possible value is:

FrenchLabel\_native - Writes data according to the FrenchLabel data form FR01. The system sends the WriteFrenchLabel\_nativeSoapIn and waits for an incoming WriteFrenchLabel\_nativeSoapOut message with the action result.

The information to be written into the SOAP message's tags is set in the tab\_rfid and tab\_rfid\_translate tables (see below).

For more information about tab\_rfid.conf, refer to the table's header.

## 58.10. Configuring writing of action data

The data format that is used when updating RFID tag information is configured in the Nedap\_item\_format variable of the tab\_rfid.conf table. The Aleph item information that is written to the tag is configured in the tab\_rfid and tab\_rfid\_translate tables.

### 58.10.1. tab\_rfid

The tab\_rfid table defines which fields from the item record are expanded into the transponder record (RFID).

- Column 1 lists the element names of the update-item message. In other words, if the FrenchLabel\_native format is defined in tab\_rfid.conf, then the configurable elements of the WriteFrenchLabel\_native element will be listed in column 1 of this table.
- Column 2 lists the information that will populate the update-item message element. The Aleph information that is available for configuration is derived from the Z30 (Item records) Oracle table. The information is configured in this table by specifying the field name. Constants can also be used as input for SOAP message components.
- Column 3 defines if the code of the item field is to be translated to name (e.g. sublibrary code to sublibrary name). This option is available for:
  - LibraryCode tag – using the SUB-LIB section of tab\_rfid\_translate
  - LogisticPartGroup tags – using the LOGISTIC section of tab\_rfid\_translate
- Column 4 defines the character conversion routine that is used. The default value is UTF\_TO\_RFID.
- Column 5 is for 3M usage only. It defines the field type: (I)Integer or (S)String.

Example of a setup for the FrenchLabel\_native format:

	1	2	3	4	5
SetSize	1				I
SetNumber	1				I
ItemID		z30-barcode			S
LibraryCode		z30-sub-library	Y		S
ItemNr		z30-enumeration-a			S

Below is a sample of tab\_rfid setup for 3M (the table defines the fields that will be transponder to the 3M tag and their type set in column 5):

SetNumber	1	I
SetSize	1	I
MediaType	3	I
MagMedia	1	I
ItemID	z30-barcode	S
BranchID	5	I
LibraryID	6	I
CustomData	z30-item-status	I

For more information, refer to the table's header.

### 58.10.2. tab\_rfid\_translate

The tab\_rfid\_translate table is used for translating Aleph item information from the Aleph format into a format that can be used in the Nedap SOAP message component. The table is used in conjunction with the tab\_rfid table in the following manner:

1. Any information that is defined in column 3 of tab\_rfid as Y is translated by the corresponding tab\_rfid\_translate function. The LibraryCode and the LogisticPartGroup fields (that is LogisticPartGroup1, LogisticPartGroup2, LogisticPartGroup3, LogisticPartGroup4, and LogisticPartGroup5) are the only fields that can be translated by this table.
2. If LibraryCode is defined in column 3 of tab\_rfid as requiring translation, it is translated by the SUB-LIB section of tab\_rfid\_translate table.
3. If one of the LogisticPartGroup fields is defined in column 3 of tab\_rfid as requiring translation, it is translated by the LOGISTIC section of tab\_rfid\_translate table.
  - Column 1 - defines the section.
  - Column 2 is the RFID definition. This is the message value into which that information will be translated.
  - Column 3 - defines the Aleph item information that will be translated.

The following is an example tab\_rfid\_translate table:

SUB-LIB	01	WID	Main Library
---------	----	-----	--------------



SUB-LIB	02	MED	Medicine Library
SUB-LIB	03	HYL	East Asian Library
LOGISTIC	11	GEN	General Collection
LOGISTIC	02	ARC	Archives Collection
LOGISTIC	01	WID	Main Library
LOGISTIC	05	HYL	East Asian Library
LOGISTIC	01	BOOK	Book
LOGISTIC	44	ISSUE	Issue

For more information, refer to the table's header.