



USER DOCUMENTATION (ALEPHINO 5.0)

Setup

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1 Preliminary remarks

"Setup" means the adaptation of Alephino to specific demands of your library. In this document you will find descriptions of the customisation of settings that are important for the execution of Alephino in real mode. These adjustments must be made after the installation.

For each of the setup options described below, Ex Libris (Germany) GmbH provides a standard that has to be modified according to the specific demands of your library. Some settings are required for every customer whereas other settings are only required for those customers that use the corresponding Alephino modules.

All customers have to adjust:

- library address (chapter 2)
- items control – drop-down menus (chapter 3)
- external programs/ send basket in OPAC (chapter 7)

Customer that use the circulation module, also need to adjust:

- circulation – drop-down menus (chapter 5)
- circulation parameters (chapter 6)

Customer that use the acquisitions module, also need to adjust:

- acquisitions – drop-down menus (chapter 4)
- defaults for automatically created item records (chapter 4)

For most of the settings Alephino offers the so-called setup client that can be reached via the Web Service module, i.e. the settings mentioned in the following chapters are done via a browser based interface (e.g. Internet Explorer).

The Web Service module can be reached via your browser under the address: **http://<hostname>:8040/aliadm** (Default, port number may differ). After login (user: SYS/ password: SYS) select the menu point "Setup Services". A detailed description of the individual functions can be found in the online help of the Web Service module.

2 Library address and library name in OPAC

2.1 Library address

To enter the library address, select "Setup Services", "General adjustments", "Library address". The library address is printed on the head of all borrower letters or mails (e.g. overdue notices, hold request letters). You may define different addresses for the various departments of your library:

- general address
- address for circulation
- address for acquisitions
- address for serials
- internal address

Depending on your internal workflows, please enter the required addresses resp. modify the default addresses.

In the menu "Setup Services" of the Web Service module select:

General adjustments

Server shutdown

System configuration

Sub-libraries

Library address

Enter the address lines into the spacious input fields:

Edit library addresses

General

Ex Libris (D) GmbH
-Example Library-
Albert-Einstein-Ring 19
22767 Hamburg
E-Mail: info@exl.de
Phone: (040) 89809-0 Fax: -250

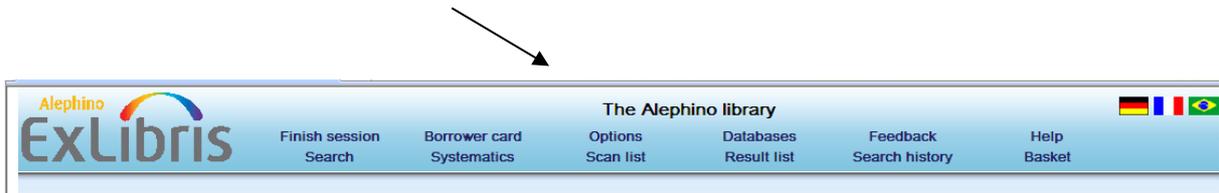
Circulation address

Ex Libris (D) GmbH
-Circulation Department-

When you finished, click on "Set" to save the addresses in the present form.

2.2 Library name in OPAC

In the Web OPAC you can display the name of your library.



This is done in the file *etc/alipac.cfg*. Note that there are several section for each communication language:

```
...
(NamesGER)
M-TIT = Die Bibliothek      << enter here the name of your library in German
...
(NamesENG)
M-TIT = The Library        << enter here the name of your library in English
...
(NamesFRE)
M-TIT = Bibliothèque      << enter here the name of your library in French
```

3 Items control

3.1 Adjusting the drop-down menus for the fields

The customer-specific drop-down menus for the input fields of the item form may be called up and edited via "Edit tables" in the Setup Services.



Relevant entries for the Items control are:

Section	Meaning
(item-collection)	collection
(item-description)	description.
(item-material)	material type
(item-status)	item status – basis for calculating the circulation parameters
(item-location)	number pattern for 1 st location and 2 nd location
(inventory-number)	number pattern for inventory number
(item-statistic)	statistic

Example:

Edit table in database

Name	Text (English)	Info	
00	monograph	00	X
05	periodical	05	X
10	newspaper	10	X
15	microfilm	15	X

Explanation of the columns:

- NAME= \ \ identification code in the drop-down list
- TEXT= \ \ long name in the drop-down list
- INFO= \ \ will be taken over to the field in the input form

Adjust the drop-down menu for each field in use. You may delete entries by clicking on the red cross behind the entry. You may modify data in the columns by changing them and you may add new entries by entering the details into the empty line at the bottom of the list. Note that the **item status** serves as a basis for the calculation of the circulation parameters (s. chapter 7).

To save the settings, click on "set". Since this information is stored in the Alephino database the changes are effective immediately. In order to update tables that already have been fetched by the GUI clients, the GUI needs to be restarted.

3.2 Automatic assignment of numbers (e.g. locations and inventory numbers)

3.2.1 Defining the number pattern

Locations and inventory number may be assigned by the system automatically. Prerequisite is that the number patterns have been defined in "Setup Services" / "Assigning numbers". Select "Add/correct":



The following details must be specified:

Add / Correct number pattern

master file:

group:

name:

pattern:

Group:

Enter the code for the group of the number patterns. The following groups exist:

master file	Group	Field
Items	001	1st location

Items	002	2nd location
Items	003	Inventory no.
Items	004	Barcode
Orders	004	Order no.
Patrons	004	Barcode

Name:

Enter the name of the number pattern that will act henceforth as a key for generating the field content automatically. For locations and inventory numbers the name must not be longer than 8 characters, for the order no. maximum 5. The name is saved in capitals – please bear that in mind when adding the name of the number pattern to drop-down lists.

Pattern:

Here you compose the field content that you want to be created automatically. You can use the following elements:

Text constant in the format **"abc"**

(any text enclosed in quotation marks, as well as characters like "/" or "-")

- Counters in the format **ddd** or **DDD**
(the number of d or D determines the minimum number of digits in the result – if necessary leading zeroes are added. If lower case "d" are used, the assignment of numbers restarts every year with 1, otherwise the count is continued.)
- Year in the format **YY** or **YYYY**
(two or four digits)

The individual components of the pattern are combined with „+“.

To get an overview over all defined number patterns please use "Assigning numbers" / "List" and click on the rolling eyes to see the result.

3.2.2 Adding the number patterns to the drop-down menus

After you have defined a number pattern, the **name** of this pattern (see above) should be added to the corresponding drop-down list of the fields Location/Inventory number (see chapter 3.1).

Section (item-location)	Location
Section (inventory-number)	Inventory number

Example:

Edit table in database

Name	Text (English)	Info
01	Define your inventory pattern 1	01
02	Define your inventory pattern 2	02
03	Define your inventory pattern 3	03

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

reset

set

Explanation of the columns:

NAME='....' identification code in the drop-down list

TEXT='....' long name in the drop-down list

INFO='....' will be taken over to the field in the input form. Important: please use capital letters and not more than 8 characters. Example: INV1

Important:

The entry in INFO='....' must correspond to the name of the defined number pattern!

4 Acquisitions

4.1 Adjusting the drop-down menus for the fields

Also the customer-specific drop-down menus for the input fields of the acquisitions module may be called up and edited via "Edit tables" in the Setup Services.



Relevant entries for Acquisitions are:

Section	Meaning
(budget-group)	Budgets: Budget group
(department-name)	Budgets: Department
(acq_ord_group)	Orders: Order group
(acq-approval-department)	General invoice: Approval department

Example:

Edit table in database

Name	Text (English)	Info	
AVM	Audiovisual media	AVM	X
EXC	Exchange	EXC	X
MON	Monographs	MON	X
OTH	Other	OTH	X
SER	Serials	SER	X

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

reset

set

Explanation of the columns:

NAME= \ \ identification code in the drop-down list

TEXT= \ \ long name in the drop-down list

INFO= \ \ will be taken over to the field in the input form

Adjust the drop-down menu for each field in use. You may delete entries by clicking on the red cross behind the entry. You may modify data in the columns by changing them and you may add new entries by entering the details into the empty line at the bottom of the list.

To save the settings, click on "Set". The changes are effective immediately, only the Acquisitions/Serials module must be restarted.

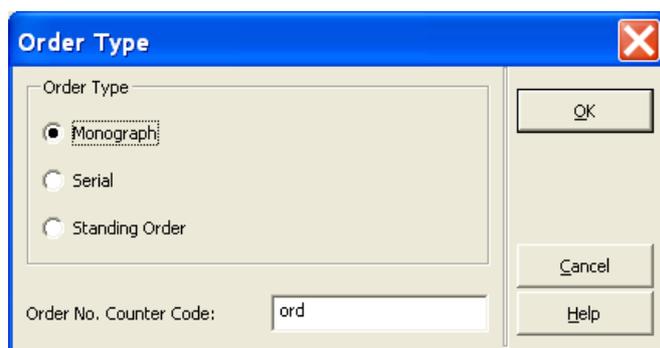
4.2 Automatic number assignment of the order number

4.2.1 Defining the number pattern

The order numbers may be assigned by the system automatically. Prerequisite is that a number pattern has been defined. To do so, please proceed as described in chapter 3.1 of this document. Select as Master file "Orders" and as Group "004".

4.2.2 Setting up an order no. counter code

For creating a new order you may activate a field "Order No. Counter Code" in the bottom part of the window "Order Type" and set the name of a previously defined order number pattern as default. This name will then be filled in automatically in the field order number in the order form. If necessary, it may be removed or replaced by another name.



For setup, edit the section [OrderNumber] in the file **acq.ini**, directory **acq/tab** in the client:

```
[OrderNumber]
EnablePrefix=Y          << activate field with Y
PrefixString=ORD       << enter the name of the order number pattern here
```

4.3 Acquisitions – Defaults for automatically created items

For automatically created item records you may define defaults in the file **itemdef.cfg** (for items created via monograph orders) or **seritemdef.cfg** (for serial items created via publication schedules for subscriptions) in directory **etc** dependent on sub-library und collection (Attention: collection must be stated in order!). For all available collections, defaults may be defined (these

can be number patterns or fixed values). The table code of the collection and the sub-library are quoted in the label. These fields are already filled in the order form and are taken over into the item records.

Syntax

Label (<collection><sub-library>)
 Content Field number = default

Examples:

```
(00001SL)
100$a = LOC1
107$a = LOC2
115   = INV
A98$a = Automatically created.
```

```
*
(00004SL)
115   = INV
A98$a = Automatically created.
```

Field number\$Subfield	Name
100\$a	1 st location
107\$a	2 nd location
115	Inventory number
125	Description
A82	Volume
A83	Copy number
A84	Part
A87	Material type
A94	Circ. note
A98\$a	Internal note
A98\$b	OPAC note
STA\$a	Statistic

Further notes:

The fields item status (ip) and item process status (02) are automatically allocated by the program, thus need not be defined in this file.

The number patterns must be defined via the Alephino Service module beforehand; the name of the number pattern is quoted as default.

Please note that the defaults for automatically created serial items must be defined in the file **etc/seritemdef.cfg**.

4.4 Serials – Vendor arrival

If you have a lot of subscriptions for a serial from one vendor, it is practical to use the Vendor Arrival functionality. The Vendor Arrival functionality is activated by the switch **VendorArrival=Y|N** in the file **etc/alephino.cfg** on the server. In the standard, the switch is set to Y. You can use the Vendor Arrival in the Control tree / Group node / tab "By vendors". The system checks how many items of an issue are expected and all you need to do is fill in the number of actually arrived items. Please note if you work with routing lists, the items must have received a barcode. Thus, we recommend to create a number pattern for the item barcode (chapter 3.2) and fill the barcode field in the automatically created items with this number pattern (file **etc/seritemdef.cfg**, see chapter 4.3).

5 Circulation

5.1 Adjusting the drop-down menus for the fields

The customer-specific drop-down menus for the input fields of the Circulation module may be called up and edited via "Edit tables" in the Setup Services, too.



Relevant entries for Circulation are:

Section	Meaning
(bor-status)	Local patron information: borrower status
(bor-type)	Local patron information: borrower type
(bor-delinq)	Local patron information: local delinquency 1-3
(field)	Global patron information: global note 1-3
(user-delinq)	Global patron information: global delinquency 1-3
(user-title)	Global patron information: title
(user-address-type)	Address information: address type
(z31-type)	Cash type
(hold-priority)	Hold request priority

Example:

Edit table BOR-STATUS in database

Name	Text (English)	Info	
1.	employee	01	X
2.	non-employee	02	X
3.	student	03	X
4.	institution	04	X
5.	library	05	X
6.	library staff	06	X

--	--	--

reset

set

Explanation of the columns:

NAME= ` . . . ` identification code in the drop-down list

TEXT= ` . . . ` long name in the drop-down list

INFO= ` . . . ` will be taken over to the field in the input form

Adjust the drop-down menu for each field in use. You may delete entries by clicking on the red cross behind the entry. You may modify data in the columns by changing them and you may add new entries by entering the details into the empty line at the bottom of the list.

To save the settings, click on "set". The changes are effective immediately, only the Circulation module must be restarted.

6 Circulation parameters

6.1 Introduction

The parameters of the circulation are based on the **item status** and the **borrower status**. Both statuses are two-digit numeric codes.

The **item status** is entered into the item form (s. Fig.1). It is always a two-digit code.

III.1: Item status

The screenshot shows a web-based form with several tabs: '1. Item Display', '2. General Information (1)', '3. General Information (2)', '4. Serial Information', '5. Serial Levels', and '6. HOL Links'. The '3. General Information (2)' tab is active. The form contains the following fields and values:

- Barcode: 123456
- Sublibrary: ZB
- Collection: (empty)
- Copy Number: 00000
- Material Type: (empty)
- Hol. Link: 0
- Call No. Type/Call No.: 11.51/TEU
- 2nd Call No. Type/Call No.: (empty)
- Description: (empty)
- Item Status: 00 (highlighted with a red box)
- Item Process Status: (empty)
- Enum. Level.1 (A)(Vol.): (empty)
- Enum. Level.2 (B): (empty)

Buttons on the right side include 'Update', 'Save Defaults', 'Refresh', and 'Cancel'.

The **borrower status** is the patron group that is entered in the local patron information form in the field "status" (see fig. below). The borrower status, too, is a two-digit code.

III.2: Patron status

The screenshot shows a web-based form with three tabs: '1. Local Patron Details', '2. Local Blocks and Notes', and '3. Local Privileges'. The '1. Local Patron Details' tab is active. The form contains the following fields and values:

- Patron ID: 00000000001!
- Barcode: 12345
- Title: (empty)
- Name: Gode, Sandra
- Sublibrary: ZB
- Patron Status: 01 (highlighted with a red box)
- Expiration Date: 05/31/2008
- Patron Type: (empty)
- Cash Limit: 0.00
- Web OPAC Message: (empty)

Buttons on the right side include 'Update', 'Get Defaults', and 'Cancel'.

You may define circulation parameters for each status. If a rule should apply to several status resp. all, you may replace the two-digit status by "##" (examples in the following parameter descriptions).

Important note:

If you want to use the Alephino sub-library system, you must define the following circulation parameters for each sub-library. To do so, select the individual sub-library via "Setup Services" / "Select sub-library" before setting the parameters.

6.2 Using the Setup Client for the Circulation parameters

- The button "set" transfers the entries from the mask to a corresponding record in current database. Changes of the circulation parameters are effective immediately!
- The button "reset" allows you to undo previous entries in this mask.
- With the red "X" the parameter in question line will be deleted.
- If you want to add a new parameter, use the empty line at the bottom of the table.

Example: Definition of periods

Setup circulation periods - sub-library: ZB

Item- and borrower-related periods

Item status Borrower status		Due date or +loan period	Due date or +loan period while hold	Grace period for overdue fees	Warranted loan period (Recall)	Max. period in case of recall	Period until renewal will be accepted	Renewal period	
##	##	+10	+5	5	5	10	1	10	X
00	01	+14	+14	+1	+14	+1	1	+14	X
00	03	+14	+10	+10	+10	10	1	14	X

any
 any

 restore from daily backup

 help

The system creates a backup copy of the initial state on that day as soon as the first modification in a parameter table is carried out.

If you want to reconstruct the initial state and discard all your modifications made on the current day, use the disk symbol. In case that you haven't made any modifications today and therefore no backup copy is present, you'll get the error message: **"No backup found"**

Please note that the changes of the parameters are effective immediately!

6.3 Opening / Closing days

- Edit circulation parameters**
- Export parameter set
- Import parameter set
- Openings**
- Limits
- Permissions
 - ~ to item
 - ~ to borrower
- Common periods
 - ~ to item
 - ~ to borrower
- Claims
- Common fees
 - ~ to borrower

Calendar - sub-library: ZB

Weekdays opened/closed

Mon	Tue	Wed	Thu	Fri	Sat	So
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Perpetual closing days

01/01/						X
12/25/						X
12/26/						X
<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>		<input type="button" value="add"/>

Specific closing days

<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>		<input type="button" value="add"/>
----------------------	---	----------------------	---	----------------------	--	------------------------------------

The opening and closing days of the library may be called up and edited via "Edit circulation parameters" / "Openings" in the section Setup Services.

The definition of the circulation calendars includes both the weekdays (Mon-Sun) where the library is open or closed and the setup of the annual closing days. The system differentiates between:

Perpetual closing days

Fixed closing days which are valid for each year. To insert a fixed closing day write into the first input field the day (DD) and into the second input field the month (MM). Then click the button "add".

Specific closing days

Variable closing days refer to a particular year. Enter the new closing days for the coming year in time so they can be included when calculating the due dates in the circulation system. To insert a variable closing day write into the first input field the day (DD), into the second input field the month (MM) and into the third input field the year (YYYY). Then click the button "add".

To delete a line, use the "X".

6.4 Limits

Define here the limits for circulation process. They can depend on a combination of item and borrower status or solely on the borrower status. To set the limits, call up "Edit circulation parameters" / "Limits" from the menu Setup Services.

- Edit circulation parameters**
- Export parameter set
- Import parameter set
- Openings
- Limits**
- Permissions
 - ~ to item
 - ~ to borrower
- Common periods
 - ~ to item
 - ~ to borrower
- Claims
- Common fees
 - ~ to borrower

Setup circulation limits - sub-library: ZB

Item status	Borrower status	Loan limit	Request limit (borrower-related)	Renewal limit	Fee limit (borrower-related)	
##	##	3	3	1	5.50	X
any						
any						
<input type="button" value="reset"/>		<input type="button" value="set"/>				



restore from daily backup



help

Item status / Borrower status

To add a new combination of item and borrower status, use the empty line at the bottom of the table. In the existing lines of the table the status values cannot be modified.

Loan limit

Specify here the maximum number of items that a borrower of the corresponding status may borrow at the same time. This limit may be defined per media type (item status).

Request limit (borrower-related)

Specify here the maximum number of hold requests that a borrower may place at the same time. It is not possible to define this limit per media type (item status), i.e. the item status must be specified as "##".

Renew limit

Specify how often a medium may be renewed depending on borrower and item status.

Fee limit (borrower-related)

Define here - depending on the borrower status - a limit for fees that if reached results in automatically barring the user from loaning. The item status must be specified in the line as "##".

6.5 Permissions

Define here the permissions for items and borrowers for the circulation process. To set the permissions call up "Edit circulation parameters" / "Permissions" ~ to item resp. ~ to borrower" from the menu Setup Services.

Edit circulation parameters

Export parameter set

Import parameter set

Openings

Limits

Permissions

~ to item

~ to borrower

Common periods

~ to item

~ to borrower

Claims

Common fees

~ to borrower

6.5.1 Item-related permissions

Setup circulation permissions - sub-library: ZB

Item-related permissions

Item status	Loan	Hold request	Multi-request	Renewal	Recall	Request avail. item	Age min.	
##	<input checked="" type="checkbox"/>		X					
any	<input type="checkbox"/>							



restore from
daily backup



help

Item status

To add a new item status, use the empty line at the bottom of the table. In the existing lines of the table the item status value cannot be modified.

Loan

Mark the check box with a tick if media with the corresponding status may be loaned.

Hold request

Mark the check box with a tick if media with the corresponding status may be requested.

Multiple hold request

Mark the check box with a tick if an item with the corresponding status may be requested several times at the same time.

Renew

Mark the check box with a tick if the loan of a medium with the corresponding status may be renewed.

Recall

Mark the check box with a tick if recalls of a medium with the corresponding status are allowed.

Request available item

Mark the check box with a tick if an (open stack) item with the corresponding status that is not on loan may still be requested.

Minimum age

If you want to define a minimum age for loaning a medium with the corresponding status, enter this here.

6.5.2 Borrower-related permissions

Setup circulation permissions - sub-library: ZB

Borrower-related permissions

Borrower status	Loan	Hold request	Multiple hold request	Renew	Ignore late return	Ignore circulation lockings	Recall	Hold request to available items	Renew while claimed	Search profiles	Self loan/self return Web-OPAC	Maximum age for borrower status
##	<input checked="" type="checkbox"/> / <input checked="" type="checkbox"/>	<input type="text"/> X										
any	<input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>	<input type="text"/>									



restore from daily backup



help

Borrower status

To add a new borrower status, use the empty line at the bottom of the table. In the existing lines of the table the borrower status value cannot be modified.

Loan

Mark the check box with a tick if borrowers with the corresponding status may borrow media.

Hold request

Mark the check box with a tick if borrowers with the corresponding status may request media.

Multiple hold request

Mark the check box with a tick if borrowers with the corresponding status may request the same title several times.

Renew

Mark the check box with a tick if borrowers with the corresponding status may renew loans.

Ignore late return

Mark the check box with a tick if late fees shall not be calculated when borrowers with this status return an item too late and the borrowers should be excluded from the claim process.

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Ignore circulation lockings

Mark the check box with a tick if ignoring the delinquencies of borrowers with this status shall be allowed (in the circulation module a corresponding button will be activated).

Recall

Mark the check box with a tick if borrowers with this status may trigger recalls.

Request available item

Mark the check box with a tick if borrowers with this status may request (open stack) items that are not on loan.

Renew while claimed

Mark the check box with a tick if loan renewals for borrowers with this status shall be accepted without warning also for items that have already been claimed.

Profile Services

Mark the check box with a tick if borrowers are allowed to create SDI Profiles.

Self-loan/return Web-OPAC

Mark the check box with a tick if borrowers are allowed to make self loans / self returns over the WWW-OPAC module.

Maximum age for borrower status

If you define here a maximum age for the affiliation to a particular borrower status (a particular borrower group) there will be a warning for each loan if that age limit is exceeded. The borrower should then be assigned to another borrower status.

The parameters "Loan", "Hold request", "Renew", "Multiple hold request", "Hold request to available item", "Ignore late return", "Ignore circulation lockings", "Self loan/Self return" and "SDI Profiles" will be copied to the category "patron local information" when a new borrower record with the corresponding status is created. A differing entry for these parameters in the specific borrower record takes priority over the value in this table.

6.6 Periods

Define here all the periods for the circulation process. To set the periods call up "Edit circulation parameters" / "Periods ~ common resp. ~ to item resp. ~ to borrower" from the menu Setup Services.

Edit circulation parameters

Export parameter set

Import parameter set

Openings

Limits

Permissions

~ to item

~ to borrower

Common periods

~ to item

~ to borrower

Claims

Common fees

~ to borrower

6.6.1 Common periods

Here you find those period definitions that are assigned to a combination of item and borrower status.

Setup circulation periods - sub-library: ZB

Item- and borrower-related periods

Item status Borrower status	Due date or +loan period	Due date or +loan period while hold	Grace period for overdue fees	Warranted loan period (Recall)	Max. period in case of recall	Period until renewal will be accepted	Renewal period	
## ##	+10	+5	5	5	10	1	10	X
00 01	+14	+14	+1	+14	+1	1	+14	X
00 03	+14	+10	+10	+10	10	1	14	X

any

any

reset

set



restore from
daily backup



help

Item status / Borrower status

To add a new combination of item and borrower status, use the empty line at the bottom of the table. In the existing lines of the table the status values cannot be modified.

Due date or +Loan period

Specify a fixed due date as **YYYYMMDD** or a period as **+DD** (number of calendar days).

Due date or +Loan period while hold request

Specify a fixed due date as **YYYYMMDD** or a period as **+DD** (number of calendar days) for the loaning of medium which has hold requests.

Grace period for overdue fees

Specify a number of calendar days as latency period until late fees are charged.

Warranted loan period

Specify a number of calendar days that is warranted as minimum loan period even in case of a recall.

Maximum period in case of recall

Specify a number of calendar days as remaining loan period if an urgent recall arrives.

Period until renewal will be accepted

Specify a number of calendar days before the due date until a renewal is accepted.

Renewal period

Specify a number of calendar days for renewals via the Web OPAC and the GUI. In the GUI, this date is a suggestion only and may be replaced by another date.

6.6.2 Item-related periods

Here you find the period definitions that depend solely on the item status.

Setup periods - sub-library: ZB

Periods referring to items

Item status	Period for hold on shelf	Reservation period	
<input type="text" value="##"/>	<input type="text" value="+7"/>	<input type="text" value="+7"/>	✘
<input type="text" value="any"/> <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	
<input type="button" value="reset"/>	<input type="button" value="set"/>		



restore from daily backup



help

Item status

To add a new item status, use the empty line at the bottom of the table. In the existing lines of the table the item status values cannot be modified.

Period for hold on book shelf

Specify a number of calendar days where requested items are kept on the hold shelf.

Reservation period

Specify a number of calendar days where available items (not on loan) can be reserved.

6.6.3 Borrower-related periods

Here you find the period definitions that depend solely on the borrower status.

Setup Periods - sub-library: ZB

Borrower-related periods

Borrower status	Expiration date	Renewal period for borrower card
##	+365	+100
any		

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Borrower status

To add a new borrower status, use the empty line at the bottom of the table. In the existing lines of the table the borrower status values cannot be modified.

Validation period

Specify a fixed expiration date as **YYMMDD** or a period as **+DD** (number of calendar days).

Renewal period

Specify a number of calendar days for renewing the borrower ID card.

6.7 Claims

Define here the claim levels for the circulation process. To set the claim periods and fees call up "Edit circulation parameters" / "Claims" from the menu Setup Services.

Edit circulation parameters

Export parameter set

Import parameter set

Openings

Limits

Permissions

~ to item

~ to borrower

Common periods

~ to item

~ to borrower

Claims

Common fees

~ to borrower



Setup claims for circulation - sub-library: ZB

Claims

Item status	Borrower status	Level	Period	Fee	Letter	
##	##	0	1	0.50	<input checked="" type="checkbox"/>	X
##	##	1	3	0.50	<input checked="" type="checkbox"/>	X
##	##	2	5	1.00	<input checked="" type="checkbox"/>	X

any	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
any	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

reset

set



restore from daily backup



help

Item status / Borrower status

To add a new combination of item and borrower status, use the empty line at the bottom of the table. In the existing lines of the table the status values cannot be modified.

Level

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Alephino 5.0

27/34

Datum: 17/09/2014

Specify here the number of the corresponding claim level. Please note that this numbering starts with 0. For each combination consisting of item and borrower status the numbers must be assigned consecutively without gap.

Period

Specify here a period in opening days after which the corresponding claim level is reached. This period counts - for claim level 0 - from the due date resp. from the date of the last claim onwards.

Fee

Specify the fees that are raised on reaching this claim level.

Letter

Mark the check box with a tick when on reaching this claim level a letter or an email shall be generated.

6.8 Fees

Define here the fees for the circulation process. To set the fees call up "Edit circulation parameters" / "Common fees ~ to borrower" from the menu Setup Services. There are fees that depend on a combination of item or borrower status (like e.g. loan and request fee) and fees that solely depend on the borrower status (like e.g. ID card fee).

Edit circulation parameters

Export parameter set

Import parameter set

Openings

Limits

Permissions

~ to item

~ to borrower

Common periods

~ to item

~ to borrower

Claims

Common fees

~ to borrower



6.8.1 Borrower- and item-related fees

Setup fees in circulation - sub-library: ZB

Borrower- and item-related fees

Item status	Loan	Renewal	Hold request	Late return/day
Borrower status				
any	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
any				
<input type="button" value="reset"/>	<input type="button" value="set"/>			



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daily backup



help

Item status / Borrower status

To add a new combination of item and borrower status, use the empty line at the bottom of the table. In the existing lines of the table the status values cannot be modified.

Loan

Specify here the loan fee.

Renew

Specify here the fee that is raised on renewing a loan.

Hold request

Specify here the fee that is raised on putting a requested item on the hold shelf.

Overdue / per day

Specify here the fee that is raised on returning an item late for each overdue day. This fee is charged independently from the claim procedure!

6.8.2 Borrower-related fees

Setup Fees in circulation - sub-library: ZB

Borrower-related fees

Borrower status	ID Card	Annual fee	Postage	Email
any	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="reset"/>	<input type="button" value="set"/>			



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daily backup



help

Borrower status

To add a new borrower status, use the empty line at the bottom of the table. In the existing lines of the table the borrower status values cannot be modified.

ID card

Specify here the fee that is raised on issuing (and renewing) an ID card.

Postage

Specify here the postage fee that is raised on sending notifications by letter to a borrower with the corresponding status.

E-Mail

Specify here the fee that is raised on sending letters by e-mail to a borrower with the corresponding status.

7 Further settings

7.1 Mail server and sender address

This information is added by the installation program both for update and new installations and therefore need not be entered manually. But in case that your mail server or the sender address has changed, you find information here on which files to modify.

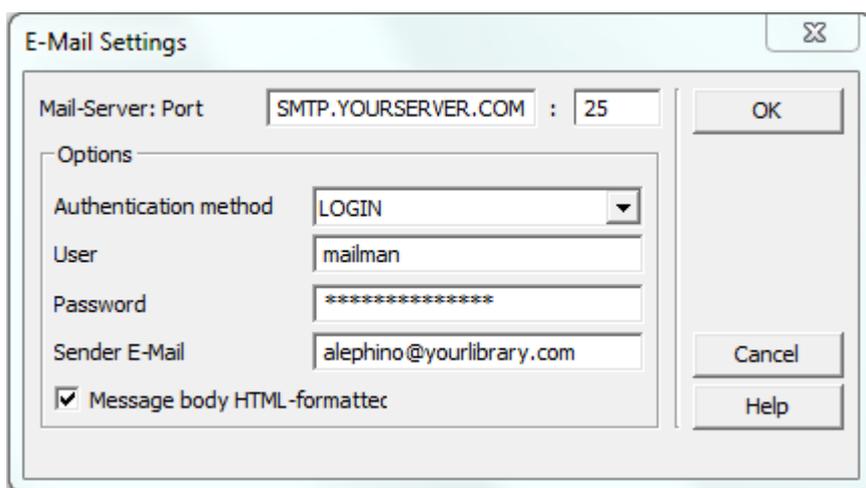
Both the GUI clients and the Web OPAC contain functionalities that use email, e.g. sending orders (acquisitions module), sending claims (circulation module), sending lists of titles (Web OPAC) or sending comments via a button "Feedback" to the library (Web OPAC).

The mail server should be accessible both for the Alephino server and the Alephino clients. Alephino 5.0 supports simple SMTP and authentication methods "LOGIN" and "PLAIN", Opac supports additionally "CRAM-MD5".

For the GUI clients, the mail server and the sender address are defined in the file alephcom.ini, directory ../Alephcom/tab .

```
[Mail]
MailServer=smtp.yourserver.de      << your mail server
FromAddress = library.yourmail.de  << your sender address
MailerName=ExLibris Bibliothek     << the name of sender
Charset= iso-8859-1                << encoding (character set)
HTMLBody = Y                       << HTML-formatted Alephino documents are
                                   not sent as attachment but instead
                                   do represent the mail body
```

The Alephino cataloging GUI includes a dialog that can be reached via menu path Alephino→Options→E-Mail Settings. With that you may process the aforementioned parameters a much more convenient way:



If parameter HTMLBody=Y is missing or has been set to N intentionally, a cover letter used for greeting text for eMail sent via the GUI needs to be written. You'll find this plain text file named **mailhead.dat** in sublist **alephcom/tab/<lng>** of the GUI client installation directory. It's obvious that this needs to be done on every workstation PC where the Alephino GUI is operated.

Example:

Dear Sir/Madam,

The Ex Libris Library is sending you a mail message in the attached file.

Sincerely,
Library Administrator

For the Web-OPAC you'll find the respective parameters at the server in file **alipac.cfg**, directory **etc**.

The installation program adds the sections (Communication) and (Webapp) with the name of the mail server and the sender address of the institution at the end of the file.

```
(Communication)
Mail = pop3.exl.de                << your mail server

(Webapp)
MailOrder = AlephinoOrder@exl.de  << e-mail address for orders from
                                   the basket
MailFrom = info@exl.de           << your sender address
```

The sender address is also the email address to which the feedback is sent.

Both sections already exist further up in the file with other parameters, e.g. the section (Webapp) with the subject line for mails from the Web OPAC:

```
(Webapp)
...
MailSubject = Alephino Opac       << default mail subject
```

7.2 Sending eMail from OPAC

You can send title records from either the brief list, the full title display or the eShelf (basket) to any e-mail address. Your selected records constituting a bibliography list are sent as attachment. The standard cover letter text in the body of the e-mail may be customised in the file(s) **mailcover.<lng>**, directory **etc** at the server. Pls. note that this adaptation needs to be done for every communication language separately.

Example:

- HTML

```
<html>
<body>
<h1>
Hello,
</h1>
<br>
<h2>
This is a message from your library
</h2>
<p/>
<em>
Greetings from Hamburg
<br>
&copy; Bibliothek <br>
Musterstra&szlig;e 128, Haus 5, D-22000 Teststadt
<br>
Tel.: +49 (044) 12345-0, Fax: +49 (040) 12345-123 <br>
Internet: <a href="http://www.bibliothek.de">http://www.bibliothek.de</a>
&nbsp;/&nbsp;
E-Mail: <a href="mailto:bibliothek@muster.de">bibliothek@muster.de</a>
</em>
</body>
</html>
```

7.3 External programs

From Alephino you may call up external programs, e.g. a word processing program or a browser. Also there is the option to call up an external link from the full view of a title.

For this, the individual paths must be defined in the client in the file alephcom.ini, directory alephcom/tab in the following sections:

```
[PrintExecute]
ERROR_EDITOR=notepad.exe
EDIT=notepad.exe $1
EXE_COMMAND=C:\Programme\Microsoft Office\Office10\winword.exe $1
WORD=C:\Programme\Microsoft Office\Office10\winword.exe $1
BROWSER=C:\Programme\Internet Explorer\Iexplore.exe $1
```

Assign here for Parameter EXE_COMMAND, WORD and BROWSER the respective paths that are valid on your local PC.

```
[External]
; PopupRunQuery -
;   is used to determine whether a dialog box should be displayed, allowing
the
;   user to change the execution parameters
;
; other lines are in the form
;
; <code>=<format> <import> <exe file>
;
; <code>   - is up to 3 characters and is server-dependent.
; <format> - should be 'A' for ascii or 'B' for binary (for ftp).
: <import> - This flag is obsolete
;
; <exe file> - the file which should be executed
;               the first %s will be replaced by the file name received from
;               the server
;
;
PopupRunQuery=N

htm=A X C:\Programme\Internet Explorer\iexplore.exe %s
txt=A X notepad.exe %s
doc=B X C:\Programme\Microsoft Office\Office10\winword.exe %s
pdf=B X C:\Programme\Adobe\Acrobat 6.0\Reader\AcroRd32.exe %s
```

Define here the paths of the programs on your PC. E.g. for the document type **.doc** the program MS Word should open etc.