

USER DOCUMENTATION (ALEPHINO 5.0)

Sub-library system



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TABLE OF CONTENTS

1 GENERAL CONCEPT	3
2 SETUP	4
2.1 Enabling sub-library mode and defining the default library 2.2 Setting up sub-libraries	4
 2.3 Alephino-User 2.4 Circulation parameters 2.5 Sub-library specific display of inventory in Web OPAC and GUI modules. 	5 6 7
3 APPLICATION	12
 3.1 PATRONS AND ITEMS	12 14 15 16

1 General concept

In Alephino a sub-library system means that all data from the individual sub-libraries may be used collectively and will be maintained in a central database that may be accessed by all associated libraries.

In contrast to an Alephino "multi-base", also called "multi-pool" - system where you also work in one installation but with separate databases, the "splitting" of data in a sub-libary system applies e.g. to patron data or acquisition data. The databases of the individual libraries thus are similar which need not be the case with a multipool system. An Alephino sub-libary system e.g. could be used at a technical college which is spread over various locations but whose sub-libary system holdings are similar and partly identical.

The cataloging in a sub-libary system takes place cooperatively in terms of entering the bibliographic data and the authority data (subject headings, authors, corporate bodies etc.). The local = sub-libary relevant data is the item records whose sub-libary affiliation may be distinguished by assigning a code (max. 5 digits) in the field "Sub-library".

The sub-library system functionalities run through all modules. E.g. in the Items module the copies are assigned to a specific sub-libary, in Circulation the patrons get permissions for different sub-libaries, in the Acquisitions module, orders are created by sub-library, and in the WWW-OPAC and in the Search module the copies are displayed separately for each sub-libary.

The permissions of an Alephino staff user in regard of the individual sub-libaries are controlled via the user administration in the "Setup Services" section of the Web Service Module. Depending on the staff user login at the Alephino Windows client the Alephino user gets connected to his home library. For the self service functions available for patrons via Web OPAC the respective home library stored in the patron record is effective. Every sub-library may have its individual set of parameters in terms of circulation, e.g. permissions, periods and fees can be configured per sub-library using the "Setup Services".

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2 Setup

In order to put Alephino into sub-library mode, the following adjustments are necessary to be made:

2.1 Enabling sub-library mode and defining the default library

For this file *etc/alephino.cfg*, section (Sublibs) needs processing:

(Sublibs)	
SublibMode = Y	← enable by Y
Default = CL	← define default library

The default library is used everywhere if a user or item record does not contain sublibrary information.

2.2 Setting up sub-libraries

First of all sub-libraries need to be defined. For this pls. select "Setup Services \rightarrow Sub-libraries" from the Web services menu.

General adjustments

Server shutdown System configuration

Sub-libraries

4/20

The input screen looks like:

short name	naming (english)	naming (german)	
CL	Central Library	Zentralbibliothek	X
SL1	Sub-library 1	Zweigstelle 1	X
SL2	Sub-library 2	Zweigstelle 2	X
reset	set		

Edit table of sub-libraries

2.3 Alephino-User

Then each employee of the library, also called **staff user**, must be assigned a default sub-library. In addition, you can define the permissions assigned to the employee for modules and functions apply to all branches and not only for the default branch. The correct assignment of employee IDs to branches is important for the circulation operation because of the location (the sub-library), in which a loan, return, reservation or fee is recognized is determined and stored under this assignment. If an employee is partly active in different sub-libraries, different employee accounts must be used.

User Mainte	enance			
Name	▼ USERX	Group	Administrator	Get current values
Permissions	- · ··			
Database M	assigned to su	ıblibrary 🛄	Permissions to	all sublibraries 🗹

Fundamental information regarding installation of staff user accounts can be found in the help chapter attached to the function.

2.4 Circulation parameters

To define the circulation parameters for a specific sub-library, first select the desired sub-library as shown below:

Maintenance			
Select database			
Select sub-library			
Show log			
Show protocol			

In the right frame the following selection box appears:

Select a sub-library ...



After having selected a sub-library all subsequentially performed settings with regard to permissions, periods, fees etc. will be assigned to this sub-library.

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6/20

Borrower-re	lated p	ermiss	ions									
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 Ioan/ self return Web-OPAC	Maximum age for borrower status
any any Employees Lecturers Foreigners	set	V			V							
Students Auxiliary Libraries Institutions	store fr aily bac	rom kup			\checkmark	help						

Setup circulation permissions - sub-library: SL1

Elaborate information regarding circulation parameters can also be found in chapter 6 of our documentation "Alephino Setup".

2.5 Sub-library specific display of inventory in Web OPAC and GUI modules

The holdings of the sub-libraries will be presented in both – the brief lists as well as the title record full - views. The following figures serve to illustrate this special display formats. The control table adjustments necessary for this are subject of the following chapter.

Record 1 of 3693	Previous Record Next Record	
Book cover		
	The 13 1/2 lives of Captain Bluebear.	The 13 ^{1/2} lives of Capitalin Bluebear
LC Control No.	2008540173	
LC Call No.	PT2673.0293 A61313 2000	
Personal name	Moers, Walter, Personal dates: 1957-	A STATISTICS
Uniform title	13 1/2 Leben des Käpt'n Blaubär. English	
Main Title	The 13 1/2 lives of Captain Bluebear. being the demibiography of a seagoing bear and excerpts from the 'Encyclopedia of the marvels, life forms and other phenomena of Zamonia and the its environs,' by Professor Abdulla Nightingale / Walter Moers ; translated by John Brownjohn.	
Varying form	Thirteen and a half lives of Captain Bluebear	
Imprint	London : Secker & Warburg, 2000.	
Physical description	702 p. : ill. ; 24 cm.	
General note	Maps on lining papers.	
Genre/Form	Fantasy fiction.	
Genre/Form	Humorous stories.	
AE - personal name	Brownjohn, John.	
ISBN	9780436275005	
No. items	4	
Items CL	2 : Bluebear.0815	
Items SL1	1 : Bluebear.910	
Items SL2	1 : Bluebear.870919	
	Previous Record Next Record	

Fig. 1: Title record full view in Web OPAC

#	Author	Title	Year	It.	Location
1	Moers, Walter,	The 13 1/2 lives of Captain Bluebear.	2000.	4	(CL:2) Bluebear.0815 (SL1:1) Bluebear.910 (SL2:1) Bluebear.870919

Fig. 2: Titles brief list entry in Web OPAC

It	e	m list			Get it				
		Location	Description	Collection	Barcode	Status	Due at	Hold req.	Subl.
C	2	Bluebear.0815		Textbook collection	098765432	on loan	11/11/2014		Central Library
C	2	Bluebear.761		Textbook collection	09189881212	available			Central Library
C	2	Bluebear.910		Textbook collection	081028300	available			Sub-library 1
¢	2	Bluebear.870919		Textbook collection	18291310001	available			Sub-library 2

Fig. 3: Items list in Web OPAC

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In order to get the aforementioned display formatting we suggest to proceed as follows.

1. Create file *etc/sublibs.ext* with the following contents:

```
*********
* Sub-formats for sub-libraries
(titl6s)
TAG=000, SUB=signCL, AFTER=SKIP
TAG=000, SUB=signSL1, AFTER=SKIP
TAG=000, SUB=signSL2, AFTER=SKIP
(signCL)
TAG=000, TEXT='(CL:'
TAG=COUNT,LINK=20:2,SUBLIB='CL',LOG=U,AFTER=') '
TAG=000.999,LINK=20:2,SUBLIB='CL',FORM=mexl3w
(signSL1)
TAG=000, TEXT='(SL1:'
TAG=COUNT,LINK=20:2,SUBLIB='SL1',LOG=U,AFTER=') '
TAG=000.999,LINK=20:2,SUBLIB='SL1',FORM=mexl3w
(signSL2)
TAG=000, TEXT='(SL2:'
TAG=COUNT,LINK=20:2,SUBLIB='SL2',LOG=U,AFTER=') '
TAG=000.999,LINK=20:2,SUBLIB='SL2',FORM=mexl3w
(subCL)
TAG=COUNT, LINK=20:2, SUBLIB='CL'
TAG=000, TEXT=' : ', LOG=U
TAG=000.999,LINK=20:2,SUBLIB='CL',FORM=mex13w
(subSL1)
TAG=COUNT, LINK=20:2, SUBLIB='SL1'
TAG=000, TEXT=' : ', LOG=U
TAG=000.999, LINK=20:2, SUBLIB='SL1', FORM=mex13w
(subSL2)
TAG=COUNT, LINK=20:2, SUBLIB='SL2'
TAG=000, TEXT=' : ', LOG=U
TAG=000.999, LINK=20:2, SUBLIB='SL2', FORM=mex13w
```

2. Process sections (titfull) and (titwww) in file etc/marcform.ext:

```
(titfull)
...
TAG=000,NAME=011ITM,LINK=20:1,INFO='GLOBAL_ITEM'
*** Sub-library inventory { ***
TAG=000,NAME='Items CL',LINK=20:2,SUBLIB='CL',INFO='SUB_LIB_ITEM',FORM=subSL1
TAG=000,NAME='Items SL1',LINK=20:2,SUBLIB='SL1',INFO='SUB_LIB_ITEM',FORM=subSL1
```

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9/20

```
TAG=000,NAME='Items SL2',LINK=20:2,SUBLIB='SL2',INFO='SUB_LIB_ITEM',FORM=subSL2
*** Sub-library inventory } ***
(titwww)
...
TAG=000,NAME=011ITM,LINK=20:1,INFO='GLOBAL_ITEM',FORM=stock
*** Sub-library inventory { ***
TAG=000,NAME='Items CL',LINK=20:2,SUBLIB='CL',INFO='SUB_LIB_ITEM',FORM=subSL1
TAG=000,NAME='Items SL1',LINK=20:2,SUBLIB='SL1',INFO='SUB_LIB_ITEM',FORM=subSL1
TAG=000,NAME='Items SL2',LINK=20:2,SUBLIB='SL2',INFO='SUB_LIB_ITEM',FORM=subSL2
*** Sub-library inventory } ***
```

3. For having our new control file *etc/sublibs.ext* recognized by the Alephino server, its configuration file *etc/alephino.cfg* needs processing:

```
(Files)
...
ApplDict = ../etc/sublibs.ext
```

4. To make our new sub-library specific formatting effective for representation of call numbers in brief lists, replace all references to the respective control table entries in file *etc/marclist.ext*:

TAG=titl6 ← replace it by **titl6s** (3 times)

5. If sub-libraries shall be displayed with its long names instead of shorthand symbols in the items list, the following modification in file *etc/marclist.ext* is necessary:

```
*** Web OPAC
(mexaweb)
COLUMN=1,TAG=mex13,HEAD=020HEAD03
...
*COLUMN=8,TAG=opacnote,HEAD=020HEAD27 ← commented out
COLUMN=8,TAG=sublibrary,HEAD=SUBLIB ← inserted
```

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10/20

6. If you want to have items belonging to the home-library of the patron that has identified himself in Web OPAC marked in a special way (green background), the following modification in file htdoc/alipac_[Ing]/itemlist-table-row.htt needs to be performed:

... \$0800 ← before >\$0800 ← afterwards

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3 Application

Basically, a sub-library system does not distinguish in the application of a system with only one central library. In some respects however there are still differences, which are listed below.

3.1 Patrons and items

Local Patro	on Information						
Subl.	Status	Description	Privileges	Valid to	Last activity		
SL1	01	employee	Loan=N Renewal=N Hold request=N Self loan=N Self return=N Ignore=N No overdue notice=N User profile=N Requesting available item=N	00/00/0000			<u>D</u> elete <u>R</u> enew
SL2	01	employee	Loan=Y Renewal=Y Hold request=Y Self ioan=Y Self return=Y Ignore=N No overdue notice=Y User profile=N Requesting available item=N	00/00/0000	06/15/2006		
ZB						*	

In a sub-library system borrower permissions are to be assigned per sub-library:

In case the sub-library system is set-up afterwards and e.g. there is now -in addition to the standard sub-library CL another sub-library SL1, all borrowers that already exist in the the circulation module must get privileges for the new sub-library. If you are logged in as user with sub-library SL1 (see section 2.4) and in the Circulation module retrieve a borrower who so far had only privileges for the sub-library CL, the system automatically creates an empty privileges record for the sub-library SL1. Highlight it and assign the desired privileges. If the privileges for the sub-library SL1 are identical those of sub-library CL, you can simply copy the privileges records of sub-library CL of all existing borrowers for the sub-library SL1. For this, please proceed as follows:

Use Web Service "Interfaces→Export data":

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12/20

Fill in the parameter form:

master file:	User permissions	
data format:	Alephino	
export file:	/temp/permissions.txt	(for example)

Leave all other input elements untouched \rightarrow klick the start - button

2. Process export file using a simple plain text editor

By search/replace replace sub-library code CL by SL1.

SUB	sl1 \leftarrow	Replaced
BOR	\$\$L000000)30\$\$a0821
229	00000000	
219	Y	
214	N	
213	N	
212	20140512	
211	N	
210	N	
209	Y	
208	Y	
207	Y	
206	Y	
205	N	
204	Y	
202	20140531	
201	01	

- **3.** Perform a "Save database", with that you have the opportunity to be able to restore the current state in case the subsequent import action fails.
- **4.** Use Web Service "Interfaces→Import data":

Fill in the parameter form:

master file:User permissionsdata format:Alephinoexport file:../temp/permissions.txtmode:load without checks

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13/20

Leave all other input elements untouched \rightarrow klick the start - button

Now all borrowers have the same privileges for our new sub-library **SL1** as known for **CL**.

Furthermore, a standard library (home library) is specified for each user in the user master data. This is important for mapping of periods and permissions for transactions executed over the OPAC. Unlike GUI transactions where the executive sub-library is determined from the registered staff user, this is naturally not possible for the OPAC.

1. Global Patron Details 2. Global Blocks and Notes								
Open Date:	00-00-00	Update Date:	00-00-00					
Patron ID:	00000000003	Pincode:	****					
Barcode:	56789	Registration Number:						
Name:	Tester, Holly		Į					
Title:	F	Date of Birth:	03/31/1975					
Home Library:	SL1	Language:	ENG					

If no home library has been specified, the systems takes the default value from Alephino configuration file **etc/alephino.cfg**.

3.2 Items

Items are assigned to a particular sub-library. This assignment is effective for the title search on the holdings of particular sub-library as well as for the further control of the circulation process.

Based on this information Alephino supports the delivery of media in foreign sublibraries to provide and, on the occasion of the return, their return to the home library.

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14/20

1. Item Display 2. General Inform	mation (1) 3. General Information (2) 4	. Serial Information 5. Serial L	evels 6. HOL Links	
Describe	45750	These Chalance		
Barcode:	13730	Item Status:		Update
Sublibrary:	SL1	Item Process Status:		Save Defaults
Collection:	00001	Enum. Level.1 (A)(Vol.):		Refresh
Copy Number:	00000	Enum. Level.2 (B):		⊆ancel
Material Type:				
Hol. Link:	0			
Call No. Type/Call No.:	B-95	Þ		
2nd Call No. Type/Call No.:		Þ		
Description:				

3.3 Orders and subscriptions

Also Orders in the acquisition and subscriptions in the serials administration are managed sub-library dependent:

1. Order Display 2. General 3. Vendor 4. Quantity and Price					
Order Number:	2006/1	Order Status:	RSV		
Additional Order No.1:		Additional Order No.2:			
Order ISBN/ISSN:	I	Order Group:			
Open Date:	15-06-06	Status Date:	15-06-06		
Order Date:	00-00-00				
Material Type:	MO				
Sublibrary:	SL1				
Acquisition Method:	P				
Initiator ID:					
Initiator Name:			Ţ		
Action:	None	Approver ID:			
Library Note:			Ţ		

1. Info. List 2. Subscription Info	(1) 3. Subscription Info. (2) 4. HOL Links
Sublibrary:	SL1
From Date:	01/01/2005
To Date:	12/31/2099
Item Status:	05
Collection:	00001
Call Number Type:	
Call Number:	
2nd Call Number Type:	
2nd Call Number:	
Vendor Code:	BLACKWELL
Order No.:	
Vendor Order No.:	
Delivery Type:	A Hol. Link: 0

3.4 Hold request processing

When requesting an item the following must be considered:

- in circulation GUI

A hold request is always related to the one sub-library the current staff user belongs to. It is therefore recommended to place hold requests on items of the borrower's home library. This happens via the item filter in the hold request form. The item filter takes over defaults from the selected item which includes the sub-library.

There are several ways for placing hold requests from circulation GUI or Web OPAC:

16/20

• from the items list, button "Hold request"

Create Hold Request				×
Patron ID / Name:	00000000001	Blaubär, Käpt'n		ОК
Author of Part:				
Title of Part:				
Pages to Copy:				45
Note 1:				
Note 2:				
From Date:	10/16/2014	To Date:	10/16/2015	
Pickup Location:		Recall Type:		
Priority:	F F			
🔲 Rush Handling				
-Item Matching Filter -				
Only Selected Iter	m	Copy:	0	
Sublibrary:	SL1	Year:		
Item Status:	00	Volume:		
Item Process Status:	Þ	Part:		
Collection:	00001	Issue Number:		Cancel
				Help

• via menu "Requests→Hold requests→Create hold request":

1. Key	uest Information	2. Item Filter Information		
Only Selected Item	1	Copy:	0	ОК
ublibrary:	SL2	Year:		
em Status:	00	Volume:		
em Process Status:		Part:		
ollection:	00001	Issue Number:		
				Cancel

• in Web-OPAC

Mark for pickup (upon return) by Blaubär, Käpt'n							
Period of interest:	10/16/2014 to: 10/16/2015						
Volume							
Pick-up location	alternative pick-up location 🔻						
Note							
I want to wait in the library for the requested material							
OK OF Back							

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18/20

A hold request placed via the Web OPAC is usually* a title hold request which refers to all items. When a hold request is placed, all items of the title are checked by the system whether they are requestable or not. If there is no requestable item or e.g. there is an available item a corresponding message is displayed and the hold request is not created. If Alephino is setup as sub-library system, the check for requestability is only performed on items of the borrower's home library. Requestable items of other sub-libraries are not considered.

* (unless parameter ExactRequest in ../etc/alipac.cfg was set to Y, then all requests are Item requests and refer to the selected item only)

The sub-library in the hold request record becomes the home library of the borrower (on placing requests via OPAC) or the sub-library of the staff user:

List of Hold Requests							
No.	Subl.	[Barcode] title	Status	valid from	valid to		
1/3	Central Library	[MR012] Alonso Blas, Diana: Data protection at Eurojust The Hague European Parliament 2012	item requested	10/16/2014	10/16/2015		
2/3	Central Library	[MR003] The EU and human rights / edited by Philip Alston ; with the assistance of Mara Bustelo and James Heenan. Oxford : Oxford University Press, 1999.	provided	06/12/2012	06/19/2012		

If now an item is returned, the system checks whether there is a hold request for the title, i.e. for any item of the title. In a sub-library system, only hold requests of the own sub-library (i.e. hold request records whose sub-library matches with the sub-library of the logged-in Alephino user) are checked. If such a hold request is found, the system then checks whether there are available items in the own sub-library which can be provided.

If you want to give the user the option of reserving a targeted media belonging to other than his home library, the hold request processing can be configured to execute item requests only.

For this purpose parameter **ExactRequest = Y** needs to be set in file **etc/alipac.cfg**. With that button "GetIt" will appear on each item/copy.

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Item list

	Location	Description	Collection	Barcode	Status	Due at	Hold req.	Subl.
Get it	Bluebear.0815		Textbook collection	098765432	on loan	11/11/2014		Central Library
Get it	Bluebear.761		Textbook collection	09189881212	available			Central Library
Get it	Bluebear.910		Textbook collection	081028300	available			Sub-library 1
Get it	Bluebear.870919		Textbook collection	18291310001	available			Sub-library 2

The hold request is then valid for the selected item, even if the sub-library of the item does not match the home library of the borrower who triggers the hold request. However, so that no other copies of the title are considered to satisfy the reservation.

Pls. note that an item foreign to the sub-library is not provided automatically on the occasion of its return.

In order to have such reservations fulfilled (provided), it is necessary to seek to create a list of current reservations / deployments on the appropriate menu item in the Web Services regularly:

Circulation/Items→*Requests* & *ProvisionsCreate requests report*

The provisioning of items requested from foreign sub-libraries needs to be initiated manually in the circulation GUI. The respective media must be shipped to the pick-up location that also may differ from the home library of the requesting patron.

Pick-up locations can be configured via Web Service **Setup Services→Edit Tables** The name of the entry to be selected firstly is "HOLD-PICKUP-LOCATION":

Edit table HOLD-PICKUP-LOCATION - in database

20/20