Aleph Product Update

Carmit Marcus| Director, Product Management and Partnership

Agenda

1 Aleph today

2 Aleph roadmap

3 Aleph 23.0, 23.1 and 23.2 highlights

4 Plans for V24 and beyond

ExLibris

Aleph today CARMIT

- 2631 institutions worldwide

- Current version – V23

ExLibris

Aleph Roadmap

- V22.0 – Major Release
  - Available – January 2014
- V22.1 – Minor Release
  - Available – December 2014
- V23.0 – Major Release
  - Available – November 2015
- V23.1 – Minor Release
  - Planned – December 2016
- V23.2 – Minor Release
  - Planned – December 2017
- V24.0 – Major Release
  - Planned – December 2018
- V24.1 – Minor Release
  - Planned – December 2019
- V24.2 – Minor Release
  - Planned – December 2020
- V25.0 – Major Release
  - Planned – December 2021

More to come…

ExLibris

Aleph V23.0 Highlights (released in November 2015)

igelu
International
Group of Ex Libris Users

ExLibris®
a ProQuest Company

Automatic reset of lost/forgotten account passwords

- Enhancing the option to reset lost/forgotten account passwords within Aleph

- Enhancing the password reset flow provided a better and safer tool that guarantee the user's privacy and security

ExLibris

Automatic reset of lost/forgotten account passwords

Please identify yourself:

User ID/ Barcode:	
Verification:	
Library Branch:	Shared Pool ▼

[Log On] [Guest] [Register] [Forgot Password?]

ExLibris

Automatic reset of lost/forgotten account passwords

- Upon activating the "forgot password" button, a new page will be displayed :

- After pressing "Go", the system will generate an email to the user with a link to reset the password

• Password Reset URL (email notification)

> **Subject**: Resetting Library account's password (Aleph)
>
> Dear User,
>
> You recently requested a password change for your Aleph account. You can set a new password here:
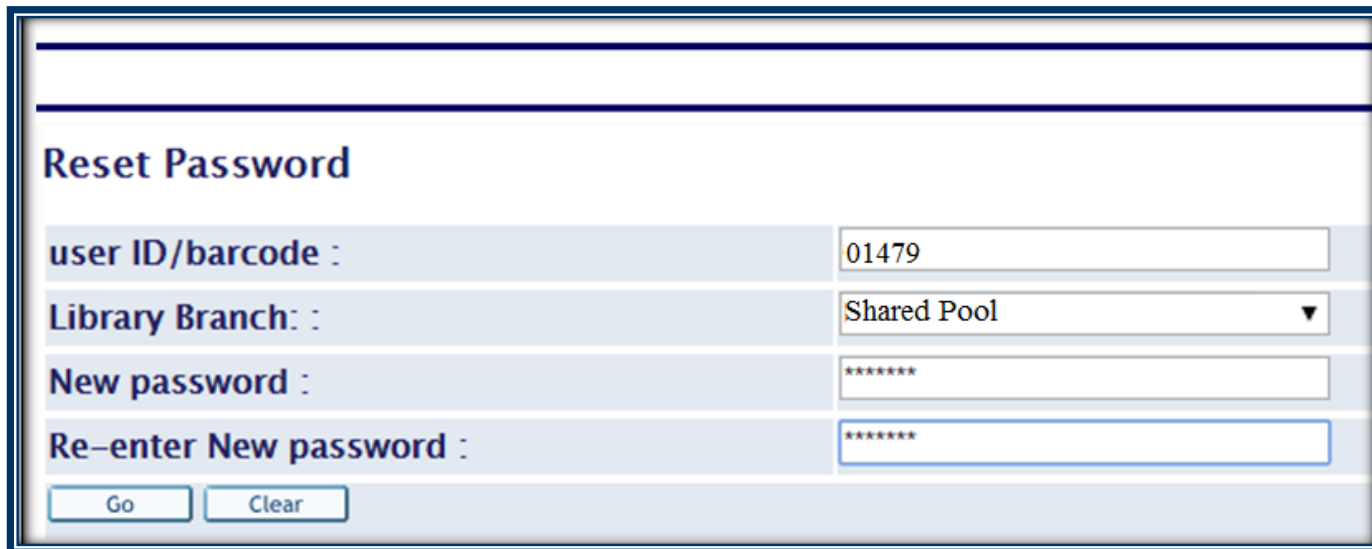>
> Reset password
>
> If you don't want to change your password or didn't request this, you may ignore and delete this message.
>
> Thanks!
> Library staff

Automatic reset of lost/forgotten account passwords

- The Reset Password form

Automatic reset of lost/forgotten account passwords

- Password reset has been successful (email notification)

Subject: *Successful reset of your library account's password (Aleph)*

Dear User,

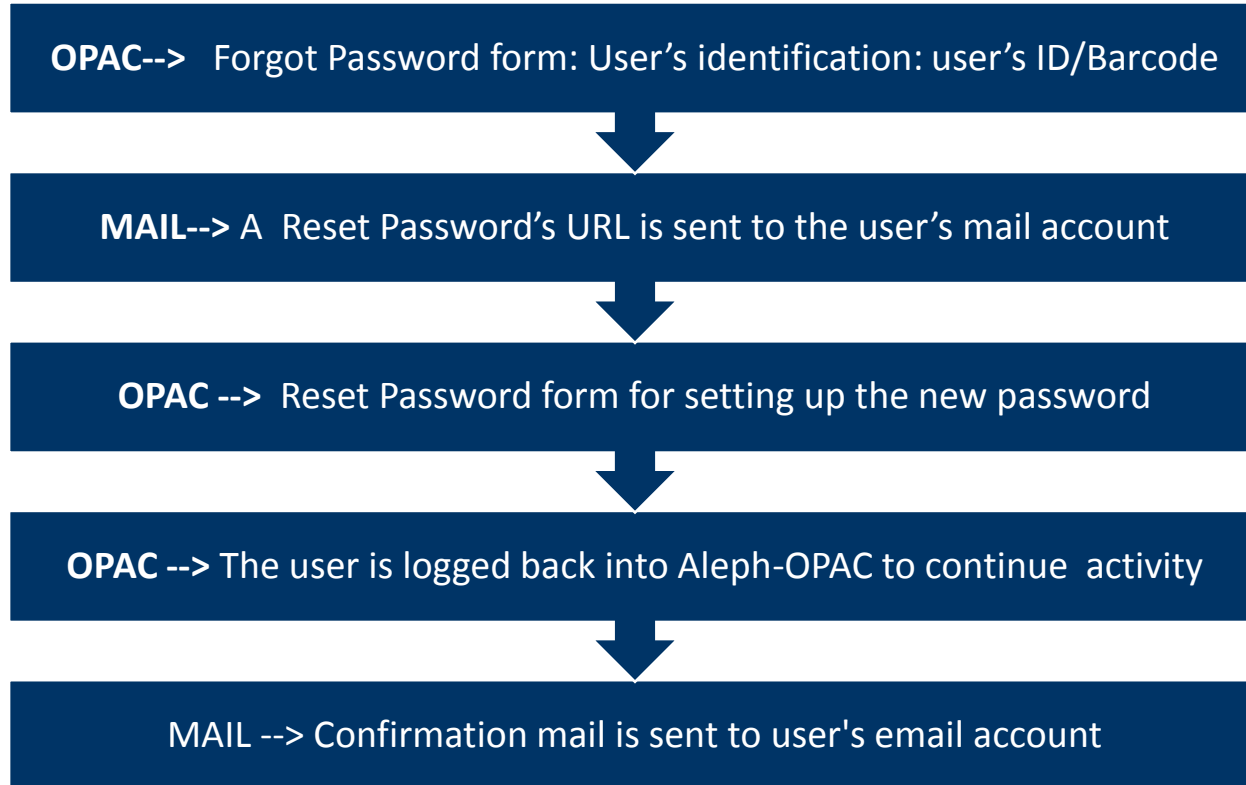*You have successfully reset the password for your Aleph Library account.*

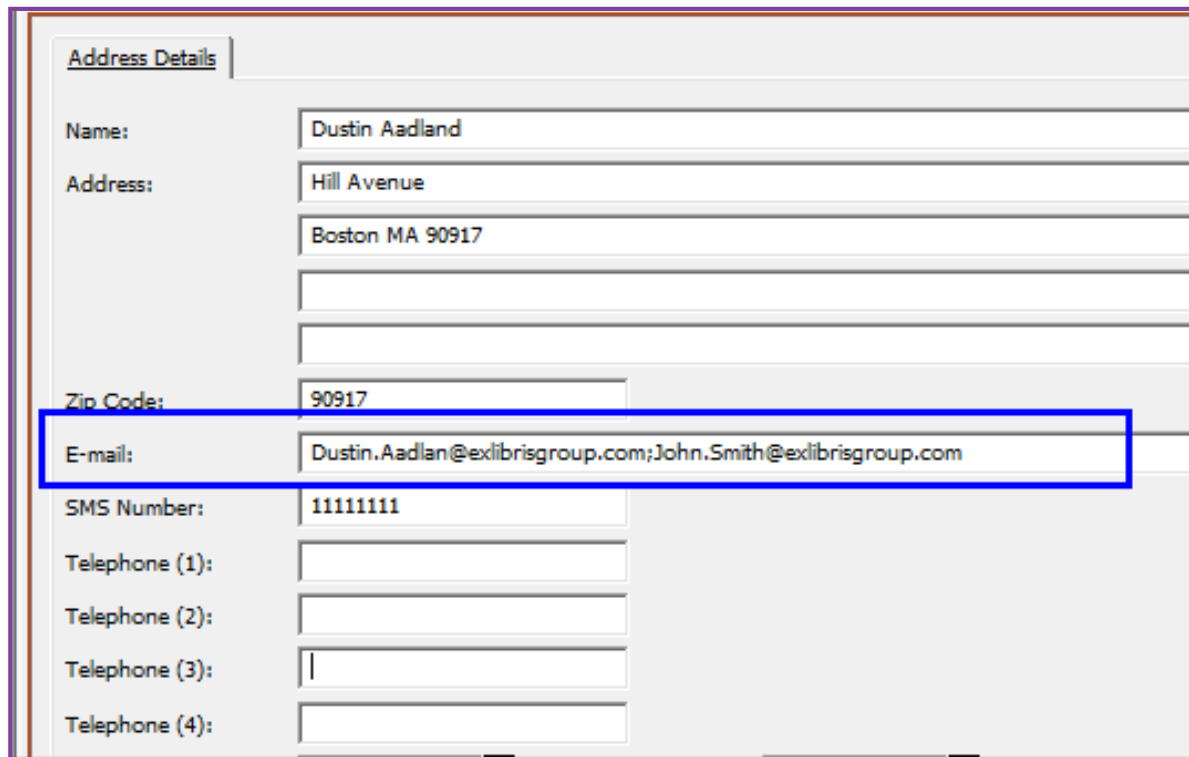*Continue to login into your account*

Thanks!
Library staff

ExLibris

Automatic reset of lost/forgotten account passwords

- New flow:

```
┌──────────────────────────────────────────────────────────────────────┐
│  OPAC-->  Forgot Password form: User's identification: user's ID/Barcode │
└──────────────────────────────────────────────────────────────────────┘
                                    ▼
┌──────────────────────────────────────────────────────────────────────┐
│  MAIL--> A  Reset Password's URL is sent to the user's mail account      │
└──────────────────────────────────────────────────────────────────────┘
                                    ▼
┌──────────────────────────────────────────────────────────────────────┐
│  OPAC -->  Reset Password form for setting up the new password           │
└──────────────────────────────────────────────────────────────────────┘
                                    ▼
┌──────────────────────────────────────────────────────────────────────┐
│  OPAC --> The user is logged back into Aleph-OPAC to continue  activity  │
└──────────────────────────────────────────────────────────────────────┘
                                    ▼
┌──────────────────────────────────────────────────────────────────────┐
│  MAIL --> Confirmation mail is sent to user's email account              │
└──────────────────────────────────────────────────────────────────────┘
```

ExLibris

Longer email field in Patron address

- There are customers who need to insert more than one email address into the email address field in Z304

- Z304-EMAIL-ADDRESS field was extended from 60 characters to 120 characters

Address Details

Name:	Dustin Aadland
Address:	Hill Avenue
	Boston MA 90917
Zip Code:	90917
E-mail:	Dustin.Aadlan@exlibrisgroup.com;John.Smith@exlibrisgroup.com
SMS Number:	11111111
Telephone (1):	
Telephone (2):	
Telephone (3):	
Telephone (4):	

ExLibris

Expand character limit for invoice notes field

- The general invoice note field (Z77_I_NOTE) was extended from 60 characters to 200 characters (similar to the limit of the invoice line item notes)

'Expand from Item' Enhancement

- The functionality of the cataloging feature 'Expand from Item Barcode' was enhanced to allow updating the LKR without overriding the title with the Item's description.
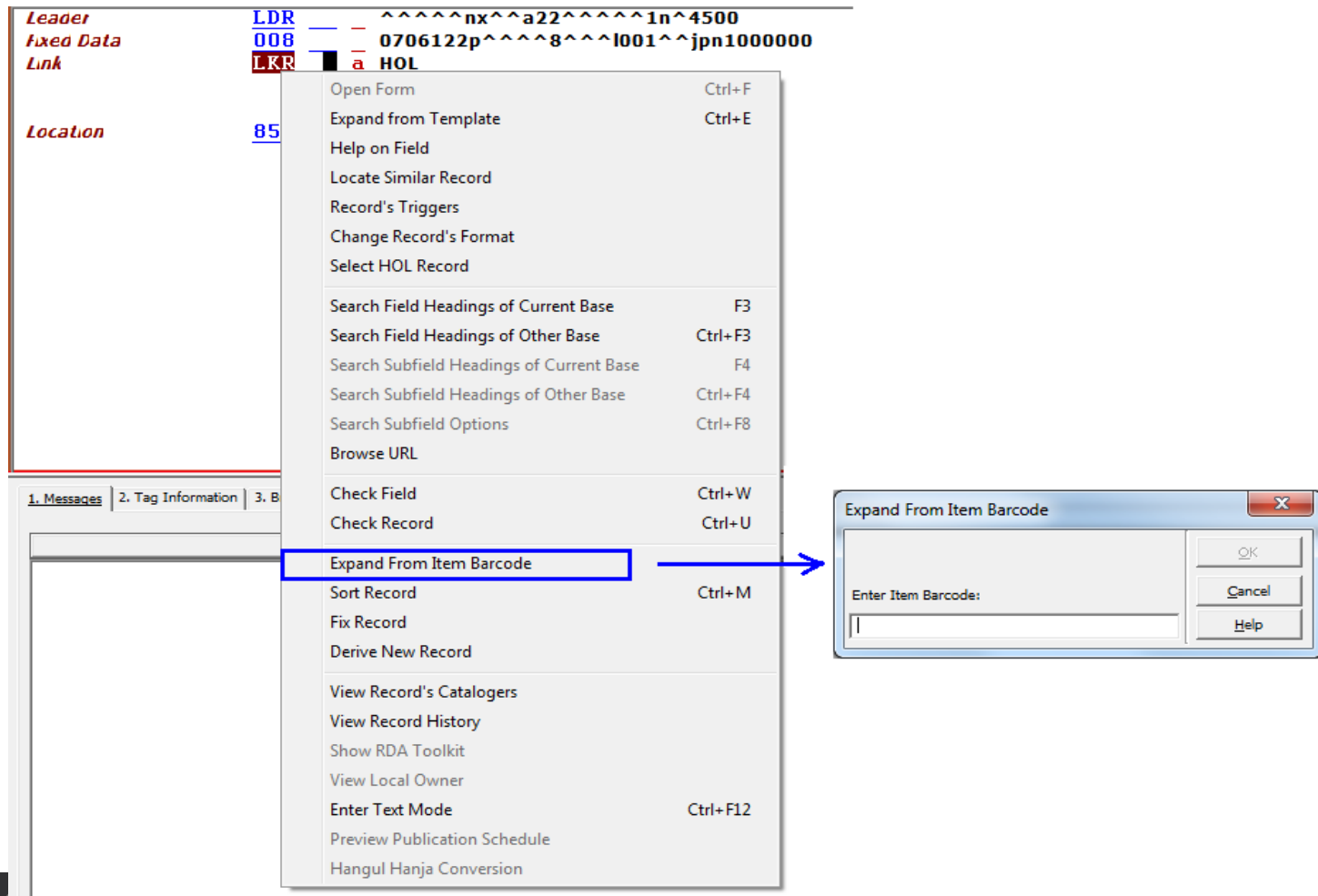
'Expand from Item' Enhancement

- This is done by introducing a new TAB100 flag (./xxx01/tab/tab100) - EXPAND-ITEM-UPD-TIT

- Possible values: Y or N

  - Y (default) – Current functionality: Upon activating the Expand from Item option, the 245$a field will be replaced by the item's description (Z30-DESCRIPTION) as is today.

  - N – Enhanced functionality: Upon activating the Expand from Item option, the 245$a field will not be replaced. There will be no update of 245$a.

Improve DLF-Items List to filter list by SBL+COLL

- The DLF service that provides Items List was showing a list of items per ADM record using Sublibrary (SBL) filter

- The Item List DLF service was enhanced so that the item's collection (COLL) will also be used as a filter

- Filtering the list by collection (Z30-COLLECTION) will provide results ONLY if sublibrary filter is defined

- Sample of the URI when collection filter is properly defined (with sublibrary filter):

  http://[server-name]:1891/rest-dlf/record/USM01000000555/items?&sublibrary=MED&**collection=GEN**&lang=eng&view=full

ExLibris

Infrastructure certification

- Aleph 23.0 was certified with:
  - Oracle 12
  - RH 7
  - JAVA 8

ExLibris

Aleph V23.1 Highlights (planned for December 2016)

Amend behavior of Search Field's Headings

- Allow the library to define subfield/s which should be ignored when activating the GUI-Cataloging function: Search Heading F3/Ctrl+F3

- The GUI-Cataloging -Edit record offers a useful tool (known as F3/Ctrl F3) for searching headings in various bases. This tool uses all subfields of the source date as the search string

- Enhancing this mechanism to ignore specific subfields which are not relevant for the action (such as control/linking fields) will refine the search string and provide a better heading results list

ExLibris

Amend behavior of Search Field's Headings

- Aleph will offer a new setup option to define the *subfields that should be ignored* when building the search string for the 'search heading' actions (F3 & Ctrl+F3)

- This new feature will affect the manual activation of 'Search Field Headings' via GUI-Cataloging-Edit record interface.

- It will apply both actions, 'Search Field Headings of Current Base (F3 shortcut) and 'Search Field Headings of Other Base (Ctrl+F3 shortcut)

- This will be implemented by adding a *new column to current configuration table: scancode.dat*

- The new column, number 12, will define the subfields that should be ignored
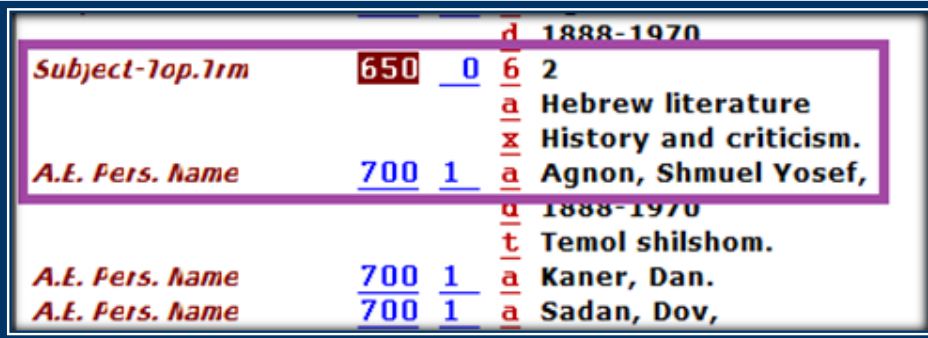
ExLibris

Amend behavior of Search Field's Headings

- Sample of setting up *scancode.dat* for defining headings search rules for field 650 with an indication to *ignore the control subfields: 6 and 8* (new column 12)
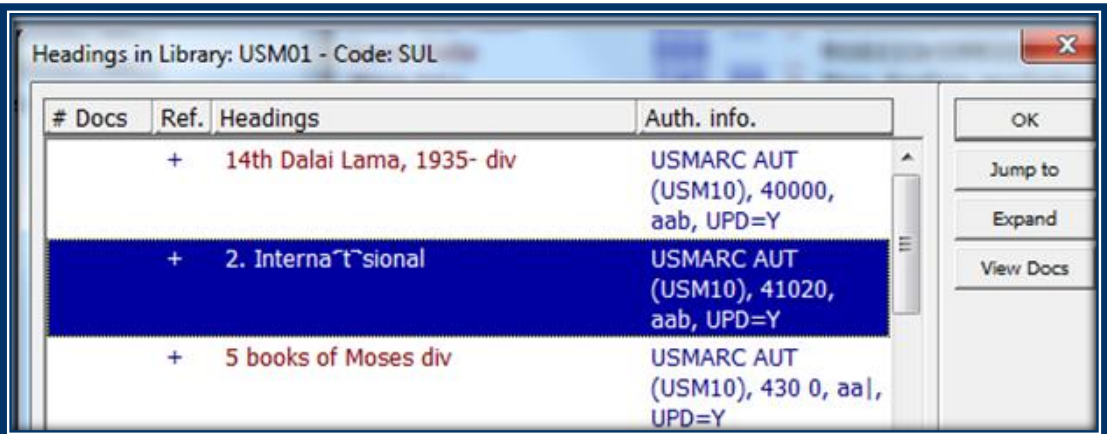
Amend behavior of Search Field's Headings

BIB record with 650#0 field that has linking data in the *first subfield 6*

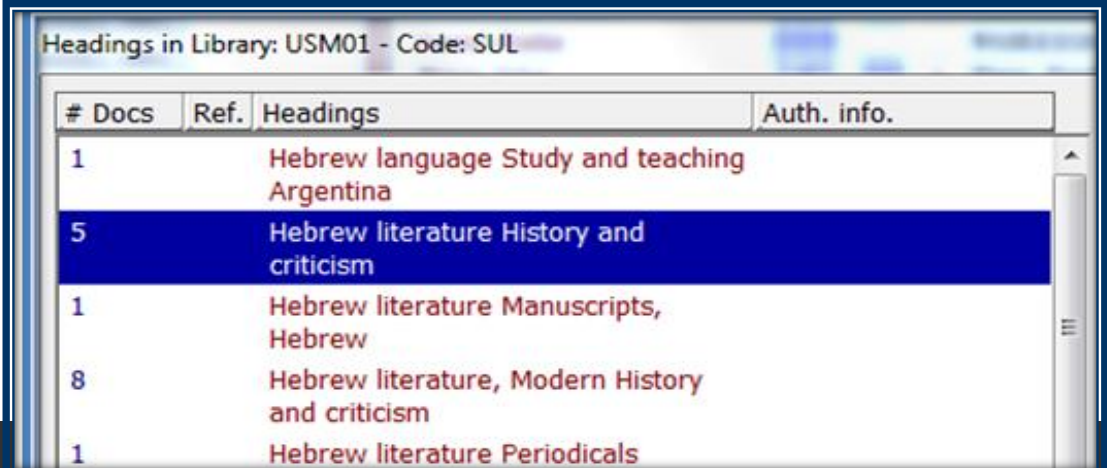*Current functionality:* The content of subfield 6 is used as a starting position when applying the heading list. Non-relevant results are displayed

Enhanced functionality: subfield 6 is ignored

Field validation for ACQ Order fields

- There is a need to validate the data entered in the Acquisitions Order Form field against the library's valid values

- This enhancement refers to the order's fields:

  - Order Group

  - Material Format

- Having a proper data inserted in the Order Group & Material Format fields will ease the handling of acquisitions order's data

ExLibris

Field validation for ACQ Order fields

- Aleph will be enhanced with 2 new validation checks on the GUI-Acquisition Order forms: Material Format & Order Group.

- This will be applied for both forms: *Order Form* & *Multi Order Form*

Field validation for ACQ Order fields

- The new check will be implemented by setting the new TAB100 flag: VALIDATE-ORDER-FIELDS

> For example: ./usm50/tab/tab100
>
> VALIDATE-ORDER-FIELDS =1

- Upon turning on the flag (value=1), the entered values will be checked against the pre-defined lists as customized by the library

- The list of possible values are set in the field's drop-down list (already in used for those fields): ACQ_ORDER_GROUP and ACQ_ERM_TYPE menus of the ADM library table: pc_tab_exp_field.<lng>.

ExLibris

Create Item Records for Detached Holdings Records

- The current Aleph batch workflow that enables creating items for holding records which have no items is complex and requires a complicated setup and dependencies which are not always relevant for the 'simple' action of creating items

- Having a batch service that gets candidate Holding records and produce item records will simplify the workflow and reduce the maintenance

ExLibris

Create Item Records for Detached Holdings Records

- A new batch service will be introduced in GUI-Cataloging module: *Create Items for Detached Holding Records (item-13)*

- This service will enable creating item records for HOL records that have no items at all

- It will be submitted in the ADM library environment so that, each library will create its own items

Create Item Records Based On Holdings

Create Items for Detached Holding Records (item-13) - USM50

* Input File	input_hol_2016
* Output File	output_item_key
* Report File Name	report_hol_item
* Item Sublibrary	Medicine Library
* Item Status	In-library use
Item Process Status	Cataloging
*Item Material Type	Book
Item Collection	GEN
Update Database	○ Yes ⦿ No
Report Format	Standard report
Sort Report by	Holding record number

The batch interface

ExLibris

Create Item Records for Detached Holdings Records

- The batch will run over all HOL records listed in the input file and detect the eligible HOL records for which items should be created

- The batch will offer an execution in 'Update Database=No' (report only with no actual update of db) and 'Update Database=Yes'

- If update database=Y → For each eligible record, a single item (Z30) will be created and the HOL record will be updated

- All required actions for supporting the linkage between the HOL and Items will be triggered (such as creating ADM record if missing and so on)

- The batch execution actions will be reported in the Report output file, Item rec-key output file and batch statistics report

ExLibris

Create Item Records Based On Holdings

January-21-2016

detached-hol-item-report.xsl

> The batch output report

Detached Holding Records Report

The Service input:

Holding Record Input file: hol_usm50_feb2016

Item Sublibrary: Art Library

Item Status: Not for loan

Item Process Status: Cataloging

Item Material Type: Book

Item Collection: General

Update Database: Yes

```
00000021000010

00000022000010

00000023000030
```

> The batch output rec-key of created items

| 1. Batch Job Details | 2. Log File |

Job ID:	510
Job name:	Create Items for Detached Holding Records (item-13)
Start time:	21/01/2016 11:06
End time:	21/01/2016 11:06
Status:	Success
Summary:	Total number of HOL Record contained in the input file: 145 Number of eligible HOL records: 38 Number of the new created items: 38
Job type:	
User:	MASTER
Errors:	No Errors

> The batch statistics report

The service outcome:

Holding Record No.	BIB Record No.	Title	ADM Record No.	Item Barcode	Item Call No.
5077	85441	American Modern Art	32214	32214-10	254.221
6774	23219	Marcel Broodthaers	32215	32215-10	
9887	87412	The Artist as Curator	32216	32216-10	544.22.2

ExLibris

Access the Service Form from the Batch Queue node

- The GUI-Task Manger enables monitoring of batch processes, printing out reports, submitting letters/email to patrons/vendors

- Currently, the form of the services which has been submitted can be accessed from the **Batch Log** node

- This means that only forms of processes which already have been run or currently running can be viewed. There is no option to access service form of processes that are waiting in line

- Enhancing the **Batch Queue** node (that lists the batch processes <u>waiting</u> in line) to allow access to the service form will enable the users to view input parameters of jobs which are not yet running and decide the relevant action (postponed/cancel/leave as is/change parameters/other)

Access the Service Form from the Batch Queue node

A new 'Service Form' Button will be located in the GUI-Task Manager-Batch Queue interface. It will allow opening the Service Form of a selected process (similar to the current functionality offered in the Batch Log interface) and enable the user to view input parameters/re-submit the form

The new button

The Service Form is opened

Input File in Publishing Services

- A new 'Input File' field will be added to the publishing processes
- This will allow having the publishing process over a refined list of records. It includes:
  - Initial Publishing Process (publish-04)
  - Delete ALEPH Published Records (publish-05)
- The current 'Create Tar File for published Records (publish-06)' already has 'Input File'

Interoperability Enhancements

- Various enhancements for improving the interoperability between Aleph and other products (partial list):

  - Primo – extending various DLF-APIs services to offer a better data exchange/update with Primo as well as all other products that used Aleph' DLF-APIs (e.g: paging for patron's loan list)

  - Supporting MAB to MARC process and vice versa in order to support various flows, updates and conversion routines between Aleph Center catalog and Alma members (within the same consortium)

  - Improving security (MD5 Key) when corresponding with payment via OPAC using DIBS External Payment system

ExLibris

Aleph V23.2 Highlights
(planned for December 2017)

igelu
International
Group of Ex Libris Users

ExLibris®
a ProQuest Company

Character conversion & non-filing indicators

- Currently, during character conversion, the non-filing indicators become incorrect when decomposed characters in MARC-8 become recomposed characters in Unicode

- This will be changed by supporting the option to re-calculate the value of non-filing indicator

ExLibris

Subfields Order in of a Retrieved Heading

GUI-Cataloging-Record Editor:

- Currently, when updating heading by using the "Search field headings of current base or other base" (F3 and Ctrl+F3 shortcuts), the subfields order in the Editor is not changed

- This will be change so that the *order of the subfields will be changed* to match the retrieved heading

ExLibris

Increase GUI frame sizes – Budget Balance Display

- In GUI-ACQ: the current GUI frame size doesn't suffice when displaying Budget balance details. Especially when dealing with budget that has a lot of information

- The GUI frame size of the Budget Balance will be extended so that more info will be shown in a single glance, reducing the need to scroll down the screen.

ExLibris

THANK YOU

carmit.marcus@exlibrisgroup.com