

Aleph Product Update

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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
 - Available – 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...

Aleph Roadmap

- V23.0 – Major Release
 - Available – November 2015
- V23.1 – Minor Release
 - Available – 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

Aleph Roadmap – under discussion

- V23.0 – Major Release
 - Available – November 2015
- V23.1 – Minor Release
 - Available – 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

V23.3

[V23.4]

V24.0

Next round of
NERS
enhancements

Aleph V23.1 Highlights (Released in 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 data 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

Amend behavior of Search Field's Headings

- Aleph offers 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 affects the manual activation of 'Search Field Headings' via GUI-Cataloging-Edit record interface
- It is relevant to both actions, 'Search Field Headings of Current Base (F3 shortcut) and 'Search Field Headings of Other Base (Ctrl+F3 shortcut)
- This was implemented by adding a *new column to current configuration table: scancode.dat*
- The new column, number 12, defines the subfields that should be ignored

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)

1	2	3	4	5	6	7
8	9	10	11	12		
LOCAL	USM01	USM10	USM12	USM01	USM11	
650#0	SUL	TOP				
				68		


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



Subject-top.1rm	650	0	6	2
A.E. Pers. Name	700	1	a	Hebrew literature History and criticism. Agnon, Shmuel Yosef, 1888-1970
A.E. Pers. Name	700	1	t	Temol shilshom.
A.E. Pers. Name	700	1	a	Kaner, Dan.
A.E. Pers. Name	700	1	a	Sadan, Dov,



# Docs	Ref.	Headings	Auth. info.
+		14th Dalai Lama, 1935- div	USMARC AUT (USM10), 40000, aab, UPD=Y
+		2. International	USMARC AUT (USM10), 41020, aab, UPD=Y
+		5 books of Moses div	USMARC AUT (USM10), 430 0, aal, UPD=Y

# Docs	Ref.	Headings	Auth. info.
1		Hebrew language Study and teaching Argentina	
5		Hebrew literature History and criticism	
1		Hebrew literature Manuscripts, Hebrew	
8		Hebrew literature, Modern History and criticism	
1		Hebrew literature Periodicals	

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

Field validation for ACQ Order fields

- Aleph was 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*

The image displays two screenshots of the Aleph Acquisition Order forms, illustrating validation errors.

Left Screenshot (Order Form):

- Order Number: 51493
- Order Status: NEW
- Additional Order No.1:
- Order ISBN/ISSN: 0032-3195
- Open Date: 28/12/15
- Material Format: TRE (Invalid material format)
- Material Type: M
- Sublibrary: LIT
- Acquisition Method: P
- Initiator ID:
- Initiator Name:
- Action: None
- Library Note:

Right Screenshot (Multi Order Form):

- Order Number: 51497
- Order Status: NEW
- Additional Order No.1:
- Additional Order No.2:
- Order ISBN/ISSN:
- Open Date: 29/12/15
- Order Date: 00/00/00 (Invalid order group)
- Order Group: GROUP789
- Status Date: 29/12/15
- Material Format: ELC
- Material Type: RE
- Sublibrary: MED
- Acquisition Method: A
- Order Unit: HIL01
- Initiator ID:
- Initiator Name:
- Action: None
- Approver ID:
- Library Note:

Field validation for ACQ Order fields

- The new check was 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>.

- 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

- A new batch service was introduced in GUI-Cataloging module: *Create Items for Detached Holding Records (item-13)*
- This service enables 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	<input type="radio"/> Yes <input checked="" type="radio"/> No
Report Format	Standard report
Sort Report by	Holding record number

The batch interface

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

Create Item Records Based On Holdings

January-21-2016
detached-hol-item-report.xml

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

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

000000021000010
000000022000010
000000023000030

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

The batch statistics report

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

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
- Before the enhacement, 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 waiting in line) to allow access to the service form enables 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 is located in the GUI-Task Manager-Batch Queue interface. It allows opening the Service Form of a selected process (similar to the functionality offered in the Batch Log interface) and enable the user to view input parameters/re-submit the form

The screenshot displays the ALEPH Circulation - Version 23 interface. The main window is titled 'ALEPH Circulation - Version 23 Library: USM50 - USMARC Administrative (USM50) Server: il-aleph23:6992 User: MASTER'. The 'Batch Queue' tab is active, showing a table of processes. A callout box labeled 'The new button' points to a 'Service Form' button in the right-hand pane. Below the table, a callout box labeled 'The Service Form is opened' points to the 'Service Form' button in the left-hand pane.

Seq. no.	Target	Proc	Date	Time
00042		p_acq_12	02/03/16	00
00043		p_acq_02	02/03/16	00
00044		p_acq_22	02/03/16	00
00045		p_cir_10	02/03/16	00

The Service Form is opened

Input File in Publishing Services

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

The image displays two side-by-side screenshots of software configuration windows for publishing services. Both windows are titled with their respective process names and the library identifier 'USM01'.

Left Window: Initial Publishing Process (publish-04) - USM01

- * Publishing Set:** PRIMO-FULL
- From Document Number (up to 9 digits):** 000000000
- To Document Number (up to 9 digits):** 999999999
- Input File Name:** Aptil-2015-pub (highlighted with a purple box)
- Processes to Create:** 1
- Runtime:** Today (dropdown menu)
- At:** [] O'clock:
- Library:** USM01 (dropdown menu)

Right Window: Delete ALEPH Published Records (publish-05) - USM01

- * Publishing Set:** PRIMO-AB6
- From Document Number (up to 9 digits):** 000000000
- To Document Number (up to 9 digits):** 999999999
- Input File Name:** del-pub-april (highlighted with a purple box)
- Processes to Create:** 1
- Runtime:** Today (dropdown menu)
- At:** [] O'clock:
- Library:** USM01 (dropdown menu)

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

Aleph V23.2 Highlights (planned for December 2017)

- Aleph has the ability to send an alert via mail when a batch service has been completed
- This can be defined for group of jobs, not for a particular job
- It is required to have this feature for a specific job especially when it is run via job list
- Especially important when there is output that waiting to be processed. For example if p_circ_12 has been run and there are pull slips that need to be processed

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Current functionality

- Current functionality allows defining of alerts for group of tasks set in col. 3 of tab_alert.
- For example: setting-up tab_alert for sending mail alerts whenever ACQ job is finished

```

!1                               2                               3
4

!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-

E_yifat.lulav@exlibrisgroup.com
859_8_TO_UTF

```

- This causes an alert for all ACQ jobs
- There is no option to define alert for a specific job (e.g. acq-14) in col. 3
- Executing an alert for acq-14 job can be achieved by setting up ACQ or ALL
- No option to have a different mail recipient per specific job

Alerts on Individual Jobs

New Functionality

- User will be able to define a specific job in col.3 of tab_alert.
- For example: setting-up tab_alert for sending mail alerts whenever acq-14 is finished

```
!1                2                3
4
!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-
E yifat.lulav@exlibrisgroup.com                acq-14
859_8_TO_UTF
```

- The process-id (without the “p”) will be set in col.3. For example: acq-14, cir-12, manage-43, etc.
- The length of the column will stay as is: 10 char
- In case a job is included in 2 lines (specific and group/ALL), an alert will be sent to both recipients

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

Subfields Order in of a Retrieved Heading

- The GUI-Cataloging -Edit record offers a useful tool (F3/Ctrl F3) for searching headings in various bases
- Upon selecting a specific headings, the BIB record is updated with data coming from the headings
- The order of subfields is not changed (stays as in the original BIB field)
- The requirement is to allow copying the order of subfields from the retrieved heading. This way, the BIB will have the heading subfields order as assigned in the file of established headings
- The current behavior is problematic because it might create a new heading entry in the heading index. There is a need to allow retaining the subfields order as in the headings

Subfields Order in of a Retrieved Heading

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Subfields Order in of a Retrieved Heading

New functionality

- In order to achieve the required functionality, a new BIB library's TAB100 flag will be introduced
- This will to allow the user to define the desired behavior of the subfields order when copying a heading into a record.
- The new setup will impact the GUI-Cataloging-Record editor flow (F3/Ctrl F3) and the background process that update headings
- It will work for headings coming from BIB, AUTH or any other base

Subfields Order in of a Retrieved Heading

- A new flag will be added to ./<bib-lib>/tab/tab100 – Heading-subfields-order
- Possible values:
 - 0 – Current functionality. Default.
 - 1 – New functionality

```
!# HEADING-SUBFIELDS-ORDER
!# Values:0 1 Default: 0
!# Type: Text; Max Length: 01
!# tab100 of library: Yes; tab100 <server type>: No.
!
! Define the order of subfields when copying heading into BIB
! record. This setup is valid for GUI-Cataloguing Editor (Search
! Field Headings F3 or Ctrl+F3), manage-102 service and Util E/8.
! 0 - The order of the BIB record's subfields is kept (default).
! 1 - The order of the subfields in the Editor is changed to match
! the retrieved heading.
```

Subfields Order in of a Retrieved Heading

- Subfields which are set as 'retained subfields' (Col.2 of scancode.dat) will not be deleted from BIB and keep their order relatively (as is today).
- The new tab100 flag will also impact the way background process are updating heading
- All updates of BIB headings (from BIB library or AUTH or other database) will consult the new tab100 flag and copy the heading accordingly.

Subfields Order in of a Retrieved Heading

Tab100 setup Action/Data	Value=0	Value=1
HEAD data is copied to BIB – same subfield diff order (F3/Ctrl+F3/service/daemon)	subfields order kept as is in BIB record	subfields order is copied from HEAD to BIB (new func.)
BIB contains extra subfields which is not in HEAD (retained or not-retained)	<ul style="list-style-type: none">- Retained subfields → remains- Non-retrained subfields → deleted	<ul style="list-style-type: none">- Retained subfields → remains- Non-retrained subfields → deleted
HEAD contains subfields not in BIB	subfields added to HEAD in the same order as in the HEAD	subfields added to HEAD in the same order as in the HEAD

Subfields Order in of a Retrieved Heading

Example: HEADING-SUBFIELDS-ORDER=1

The screenshot displays a library catalog interface. On the left, there are labels for document fields: *Subject-Top.Term*, *A.E. Pers. Name*, *A.E. Pers. Name*, *Art Grap.Repres*, *Owner*, and *Not in Table*. The main area shows a heading hierarchy for "Amphetamine" with subfields "United States" and "History". A purple box labeled "BIB 650 SSa" contains the subfields "SSz" and "SSx", with an arrow pointing to the "United States" heading. A purple box labeled "F3/Ctr F3 Search Headings" is also present. A table titled "Headings in Library: USM01 - Code: SUL" lists documents with their headings. A purple box labeled "STEP 1" is in the top right, and a purple box labeled "STEP 2" is in the bottom right. A small icon is visible in the top right corner.

Subject-Top.Term **650** **0** **a** Amphetamine
z United States
x History

A.E. Pers. Name
A.E. Pers. Name
Art Grap.Repres
Owner
Not in Table

BIB 650 SSa
SSz
SSx

STEP 1

Headings in Library: USM01 - Code: SUL

# Docs	Ref.	Headings	Auth. info.
1		Amphetamine Law and legislation United States Congresses	
1		Amphetamine United States History	
1		Amputation	
1		Amsterdam	

F3/Ctr F3 Search Headings

STEP 2

OK
Jump to
Expand
View Docs

Subfields Order in of a Retrieved Heading

The screenshot displays a library catalog interface. At the top, a window titled 'Headings in Library: USM01 - Code: SUL' shows a list of headings. The second heading, 'Amphetamine Law and legislation United States Congresses', is highlighted in green. Below this, a window titled 'Record Number 67630 in Library USM01: 1 of 2' shows the details of the selected record. The record is displayed in a table format with columns for field numbers and field content. The field content is as follows:

Field Number	Field Content
FMT	BK
LDR	00000nam a22 u 4500
001	000067630
005	20120110102841.0
008	100920s1997 xx r 000 0 ger d
0241	a 123456
0247	a 3455a z 99992z 2 isni
0247	a 4566a
0247	a 5677a
0247	a 6788z 2 isni
041	a ger
050	a AY1188.T35
080	a 101
080	a 2-18
080	a 811
1001	6 Testfeld a Hell, Andre 1. a 1901 5 Auch ein Test
24510	a Tale Spinners p Teil B
260	a New Haven : a London : b Yale University Press in assoc, c 1997.
650 0	a Amphetamine x Law and legislation z United States x Congresses
651 0	a Kiel.
648	a mi
7001	a Schwetzig, Gisela.
7001	a Schneider, Hildegard.
856a	u http://exlibrisgroup.com

A purple box highlights the selected heading '650 SSa SSx SSz SSx'. A red box highlights the subfields 'Amphetamine |x Law and legislation |z United States |x Congresses'.

Subfields Order in of a Retrieved Heading

The enhanced functionality impacts the way the selected heading is copied to the BIB

BIB updated:	<u>650</u> <u>0</u>	<u>a</u> Amphetamine
650 SSa		<u>x</u> Law and legislation
SSx		<u>z</u> United States
SSz	STEP 4	<u>x</u> Congresses
SSx		

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

Increase GUI frame sizes – Budget Balance Display

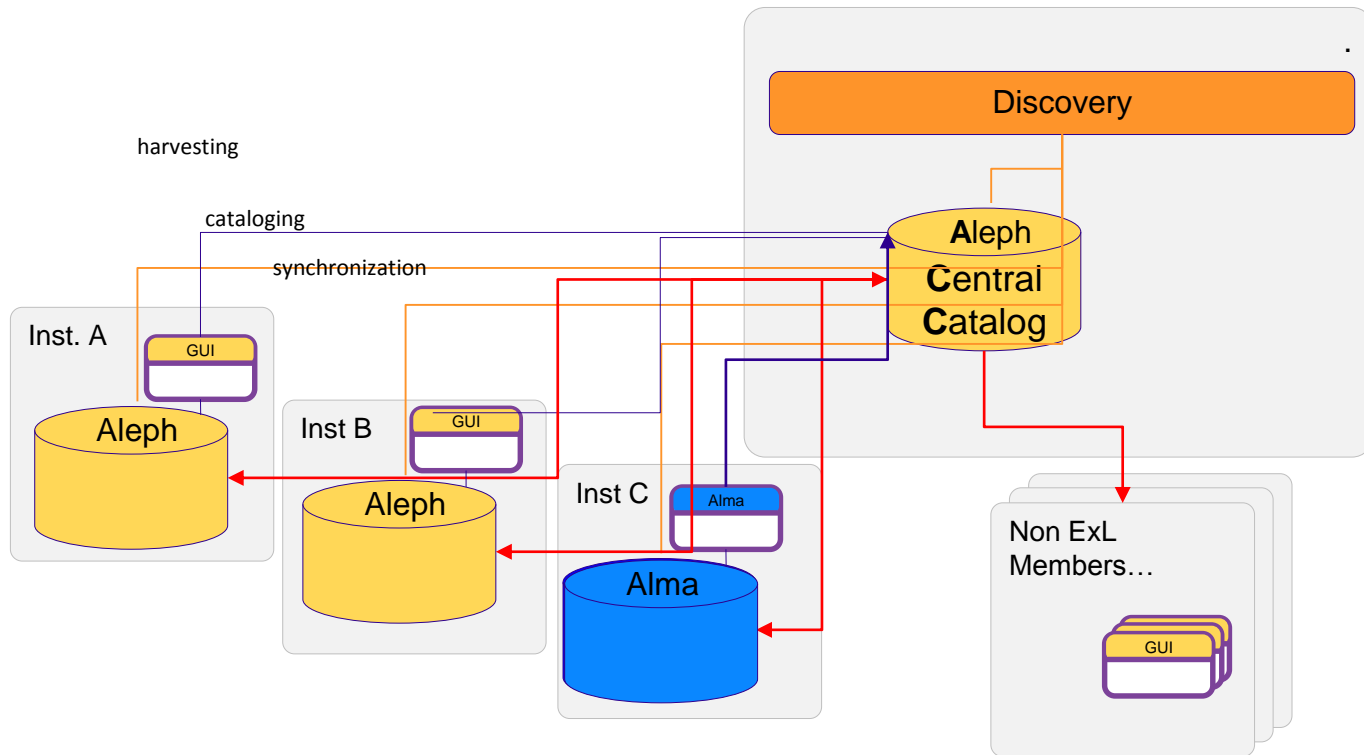
- In GUI-ACQ: the current GUI frame size doesn't suffice when displaying Budget balance details. Especially when dealing with budget that has a lot of information
- The GUI frame size of the Budget Balance will be extended so that more info will be shown in a single glance, reducing the need to scroll down the screen.

Support Hybrid Consortia

- Hybrid Model
 - Alma Member – ALEPH Central System
 - Aleph member – Alma Network (Alma Network Zone – NZ)

Support Hybrid Consortia

- Hybrid Model
 - Alma Member – ALEPH Central System



- Hybrid Model - Alma Member – ALEPH Central System

Load Item from Alma Member to Aleph Center

- Phased approach to move a consortium to Alma
- Until the process is completed there is a need to support various library flows that keep the synchronization between the center (which is still in Aleph) and the members that already moved to Alma
- Update the Aleph center with item information coming from the Alma members. This info should create BIB Z300 records which are used for OPAC display, statistics and publishing.

- Hybrid Model - Alma Member – ALEPH Central System

Load Item from Alma Member to Aleph Center

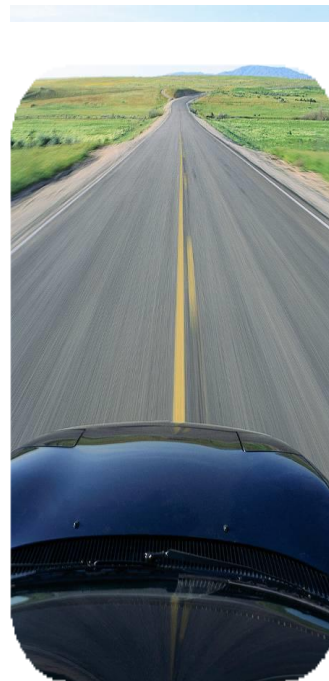
- Alma members will use the publishing platform in order to update the Aleph center with new/update/delete records
- A new Aleph batch service (p-manage-60) will load the published file and update the info of the items held by the members
- Aleph will be using the BIB Z300 infrastructure which is already in used by German speaking consortia
- The Z300 records will be created/updated/deleted based on the input received from the members (the published file)

Infrastructure Changes in V23.1

- Separate Tomcat from Aleph software tree - will enable the option to update the Tomcat version by downloading 3rd party product only, without installing a SP
- Aleph installer with windows 10 - due to several complains by the Aleph customers, Ex Libris improved Aleph installer in order to support installations on Win 7/10. Was also downgraded to V.22

Plans for V24 and Beyond

- Major release
- Planned – December 2018
- Scope based on input from:
 - User groups initiated enhancements
 - Ex Libris Support
 - Product Management
- Items for consideration:
 - Facilitate or support strategic URM/URD2 direction
 - Extending support for protocols and standards
 - Infrastructure SW/HW certifications



Future versions (beyond V24)

- User group enhancements
- Extending support for protocols and standards such as NCIP, SIP2, RFID, EDI
- Facilitate or support strategic URM/URD2 direction
- Infrastructure SW/HW certifications

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