

ALEPH VERSION 23

New Features and Functionality

CIRCULATION

New Buttons

'Go to Patron' Button in the Items tab

The List of Items page in the Circulation module has been enhanced to include a Go to Patron button that displays the Loans pane of the Patron tab. The button will only be active if the item selected is checked out.

'Go to Item' button in the Circulation Log

There is a new Go To Item button in the Circulation Log. Clicking the button opens the Circulation Items List. This button only exists in the Circulation module.

New Displays

Pop up of Loan Notes when an Item is Returned

Loan Notes will now pop up if the Display Loan Notes checkbox is clicked in Return Options.

Loan Session Enhancements

When loaning items, the number of loans will be displayed in the Loan Session tab. In addition, a new column for the call number of the item being checked out will be displayed.

Display of Accrued Fines in GUI

Accrued fines are now displayed in the Patron Cash List and as part of the loan and return sessions.

Display of Patron Related Blocks and Notes

Blocks and notes are now displayed as a part of the return and loan sessions.

Additional Overdue Items Message

A new message will display in the lower pane of the Return page. When scanning an item, it will display whether a patron has other overdue items.

New Checks – (Configurable by Institution)

Hold Request Checks

There are many more check routines to block patrons from placing holds. In this version, it is now possible to block a patron from placing a hold if they have global or local blocks, if they have overdues, if they have reached a maximum number of overdues or overdue recalls, or if they have hit a maximum cash owing amount. There are also different ways to count how a maximum number of holds is reached.

Restricting Cash Limit Related Check Routines to Specific Cash Types

If a library blocks patron accounts based on how much they owe, it is now possible to choose which types of charges count toward the block. For instance, patron accounts can be blocked if they have more than a certain amount in overdue fines, but not in replacement charges.

Log for Patron Record Changes

A new log records changes made to the patron record, the name of the user who implemented the change, and the time and date the change was made. The log is created when the global patron record, local patron information, address information, and patron IDs of the patron record is added, updated, or deleted. To retrieve the information, a new report called cir-27 should be run.

New Letters (Configurable by Institution)

Hold Shelf Reminder Letters

A new batch service, Hold Shelf Reminder Letters (cir-38), has been added. This service reminds patrons regarding hold requests which are not yet picked-up and produces a report including all items which are not yet picked-up.

Hold Request Refusal Letter

If a library allows patrons the ability to request available items, it is now possible to

easily send a letter to the patron in the event a request cannot be filled due to the item being damaged, not on the shelf, or about to go on reserve.

Additional Events Recorded in Circulation Log

The following hold request related events are now recorded in the Circulation log:

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

Overdue Letter Enhancement (Configurable by Institution)

In version 20, when an overdue notice was sent to a patron, it listed only the items that were sufficiently overdue to require a notice. Now all overdue items can be included in the notice, even items that are not yet sufficiently overdue to require a notice. In addition, the total amount of accruing overdue fines can also be included on the notice. This applies only to cir-51.

HTML in Email (Configurable by Institution)

The HTML Body Only option has been added to the Mail Attachment drop down list. Selecting it causes email to be sent with formatted HTML inside the body of the email instead of just plain text.

New Version of HTML Print

There is a new version of HTMLPrint. The Preview window has been replaced by the HTMLPrint window. The Print and Preview outputs are the same. Each printout opens in its own window up to a preview limit, which is configurable.

New Service for Items Lost in Circulation

There is a new batch service called 'Delete Lost Paid Loans' (cir-84) that will delete lost and paid loans out of a patron's record and change the IPS of the item to LO or WD or LP (to be determined by library staff).

New Service Manage-63

A new batch service has been introduced called Advanced Update Item Records (p-manage-63). This batch service enables the updating of more item fields than p-manage-62. The chart below shows which fields are included with each service.

Manage-62	Manage-63
Sublibrary	Sublibrary
Item Status	Item Status
Item Process Status	Item Process Status
Remote Storage ID	Remote Storage ID
Collection	Collection
Year	Item Year (First level of chron)
Call No. 1	Call No. 1
	Call No. 1 Type
2 nd Call No.	
	Call No. 2 Type
Material Type	
Arrival Date	
Order Number	
Subscription Number	
	OPAC Note
	Circ Note
	Internal Note
	Item Statistic
	Description
	Price
	Copy Number

Permissions may already be granted if the staff account has permissions for “All Unspecified Subfunctions” of “Item Update Services” (Items tab in Access Rights).

TLS and SSL Added to SMTP Settings (Configurable by Institution with IT Assistance)

The communication between Aleph and the SMTP server can now be done at a more secure level.

The following two options have been added:

- TLS
- SSL

Use these options according to the SMTP settings. The configuration for this is in the

Aleph ADM module under Email Settings. It is also possible to configure this functionality in the mail section of the Alephcom.ini.

COURSE RESERVES

‘Save Defaults’ Button in Course Record Form

There is a new button called Save Defaults in the Course Record Form. This button enables the saving of default values when adding a new course. The following fields are saved and copied: Department, Instructor, Period, From and To Dates, Unit and Weekly Hours. To delete course defaults, select the new Delete Course Defaults option under Circulation—ALEPH menu bar.

ILL

New Patron Information in Borrowing Request (Configurable by Institution)

The following fields can now be added to ILL borrowing request: Patron status, Patron Type, and Expiry date. These fields can be added to the ILL slips that are generated.

Note: The decision to include these fields in the ILL Borrowing Request is optional by each institution.

Multi-Item Borrowing Request

It is now possible to handle more than one item in each borrowing request.

Move from ILL Borrowing Requests Tab in ILL Module to Patron Tab in Circulation Module

It is now possible to "jump" from the ILL borrowing requests tab in the ILL module to the patron tab in the Circulation module to view the requesting patron's details. This can be done with the new "Push Patron" button that has been added to the borrowing requests tab in the ILL module.

Validity of Expected Return Date is Checked

Previously, when a request was generated in the ILL module and the Expected Return

Date field was manually entered, the system would not check to make sure that the date entered corresponds with the lending library's policies. This has been corrected. Now, users will receive the message "Expected return date is not valid!"

Note: For UBorrow requests generated via Mango, the expected return date is automatically generated.

Edit Series and Publication Place in ILL Module

The Series and Publication Place fields have been added to the Bibliographic Details tab. This allows users to edit these fields in the ILL module rather than having to switch to the Cataloging module.

CATALOGING

"Total Delete" of a BIB Record Checks Cataloger Level

Previously, when performing a "Total Delete" of a BIB record in the GUI Cataloging tree (lower pane), the cataloger level was not checked. That is, a cataloger with a lower cataloger level than the one performing the delete action was able to delete the record. This has been corrected. If a cataloger with a level lower than the BIB record's last cataloger level attempts to delete a BIB record, an error message is displayed.

Hot Key Activation for the Catalog Record Edit Menus

A new configuration option has been added to allow individual staff to define the hot keys for Catalog Record Edit menus.

MARC21 Update No. 14 Has Been Incorporated into Aleph

Bibliographic data – Field 382 has been updated.

Authority data – Field 382 has been updated.

MARC21 Update No. 15 Has Been Incorporated into Aleph

Bibliographic

- Formats of Music—Added code k to 008/20
- Publisher no.—Added subfield \$q to field 028
- Machine-generated Metadata Provenance—Added new field 883

Authority

- Other Attributes of Person—added subfields to field 368
- Machine-generated Metadata Provenance—Added new field 883

Holdings

- Machine-generated Metadata Provenance—Added new field 883

Show RDA Toolkit Option Has Been Added to the Edit Action Menu (Configurable by Institution, can also be set per workstation after install)

The Show RDA Toolkit option has been added to the Edit Action menu in the Cataloging module. This option enables users to link the USMARC BIB and AUT cataloging tags to the RDA toolkit. RDA users are registered in the RDA website. When applying to RDA services, Aleph uses the username and password set in the RDA site. This information is set in the PC file: CATALOG.INI.

Non-filing Indicators are Recalculated as Part of the Character Conversion

The character conversion procedure has been enhanced to update the non-filing indicator to match the number of non-filing characters after the conversion procedure is run.

When Replacing the BIB Data by a Heading, the Subfields Order is Now Based on a New TAB100 Flag

When replacing the BIB data by a heading, the subfields order is now based on a new TAB100 flag. The flag, HEADING-SUBFIELDS-ORDER supports the following values:

- 0—*When replacing the BIB data with a BIB/AUTH heading, the order of subfields remains as in the BIB field.*
- 1—*(new functionality) The order of subfields changes to the order of the selected BIB/AUTH heading.*

Configuring TYP Fields for Multiple Subfield Occurrences

It is now possible to create TYP fields for multiple subfield occurrences. Parameter A (all) has been added to col 5 of the tab_type_config file. This means that all occurrences of the subfield are checked. Set col 5 in tab_type_config.lng with the specified characters.

Z39.50 Can Be Used in Languages Other Than English

Previously it was impossible to use the Z39 server with languages other than English. For example, in the Z39 search results, the sub-library description was always in English, although the general interface is in a different language. This has been corrected. A new parameter, "connection-language" can now be defined in the Z39 base configuration file.

Number of Columns for Print-08 Changed from 6 to 10 (Implemented with new version, changes to existing print-08 formats must be requested)

Previously, the output of print-08 (Print catalog records – columnar format) could include up to 6 columns. This has been increased to 10 columns.

The following components have been changed:

- Up to 10 columns can now be defined in the rep_tab_short.lng (the table that define formats for print-08 output).
- The output form, catalog-records-columnar.xsl, has been changed to enable printout of up to 10 columns.
- The print-08 batch interface (p-print-08.xsl) can be changed to include the extended format.

File-90 Can Create Multiple Items from Each Loaded File Based on First 980\$\$\$g (Configurable by Institution and by individual p-file-90 setup)

It is now possible to create multiple items for a loaded BIB record. File-90 loader can create multiple items from each loaded file. The number of items is taken from the input file 980\$\$\$g. The file tab_loader defines the policy for the loaded record. When the item creation method (col. 4 in tab_loader) is set to 2 or 3, the file-90 loader creates new items as defined in 980 \$\$\$g. Only the first 980\$\$\$g is considered. If there is no 980\$\$\$g, a single item is created based on the 049\$\$\$a location code.

Number of Lines Used in file-90/file-96 Increased to 10,000

Previously, the Generic Vendor Records Loader (file-90/file-96) had a limit of 1,000 line that could be used in the tab_loader file lines. The limit on the number of lines is now 10,000.

Fix Routines Enhanced to Consult and Update 264\$\$c if 260\$\$c is Missing

Previously, the current fix routines in Aleph consult the 260\$\$c field (date of publication) for various procedures. For example, a fix routine is used to update the 008 field (positions 7-10). The recent Resource Description and Access (RDA) standard presents the 264 field which is similar to the 260 field. The fix routines that consult or update the 260 field should also refer to the 264 field.

The following fix routines have been enhanced to consult and update the 264\$\$c if the 260\$\$c is missing.

- fix_doc_tag_008
- fix_doc_tag_008_heb
- fix_doc_008_han_1
- fix_doc_punctuation_usm

Number of Words Indexed for Bibs Increased to 20,000

The number of words indexed for bibliographic records (in Z95) has been increased from 5,000 to 20,000 for new or modified records.

Warning message is added to the batch service log file for each truncated record.

Previously, when a record was loaded via the p_manage_18 batch service (Load Aleph Sequential MARC Records) and it exceeded the maximum size of 45,000 characters, some of the fields were not loaded and there was no warning message. This has been corrected. Now, a warning message is added to the batch service log file for each truncated record.

AUTHORITIES

Correct Heading Action–New Subfields Positioned as Last Subfield

Previously, when a heading was corrected by entering a new subfield, the new subfield could be placed anywhere in the field. Now, the order of the subfield remains unchanged. If a new subfield is added that is not part of the original heading, the subfield is positioned as the last subfield.

Search by Keyword in Headings for Words with Diacritics Fixed

Previously, searching by keyword in headings (z01x) did not work properly for words with diacritics if the naco_diacritics table (FILING-KEY-10) was used for word indexing but not for normalized text in headings (that is, the line "01 N char_conv FILING-KEY-10" is not present in tab_filing).

This has been corrected. A new character conversion type has been introduced for searching by keywords in headings—"HEADING-KEYWORD." It must be defined in /alephe/unicode/tab_character_conversion_line and should use the same character conversion table as the normalized text.

ITEMS

Item Changes Alert

If a user updates an item and then moves to another item, a message is displayed requesting confirmation that the user wants to move to the new item without saving the changes.

Item List Filter

The following new buttons have been added to the bottom of the Item List in the Aleph Cataloging and Acquisitions/Serials modules to allow for filtering the Item List by sublibraries and year:

- **Filter by** – Click to display the Item List Filter window that allows filtering the Item List by year and sublibrary.
- **Clear Filter** – Click to clear the filters and refresh the item list to display all items according to the user privileges and sort routines. When the full list is displayed without filtering this button is disabled.

Add or Duplicate Multiple Items in a Single Action, in the Acquisitions or Cataloging Item Lists

A new button has been added to the Item Expand form: Add Multiple. When it is clicked, a new dialog box displays called Add Multi-Items, enabling the user to enter the desired number of items to create or duplicate (up to 100).

When clicking "Add" on the "Add Multi-Items" dialog box, the box is closed and the desired number of items are created. The Items List is refreshed with the newly created

items, and the first item created is selected in the list. If the alephcom.ini variable "ConfirmMultitem" is set to "Y", a message is displayed on top of the Items List, showing the number of items created. For example—"30 items (out of 30) created".

Note that when adding multiple items, the barcode field of the item form must be empty to allow the system to automatically assign a unique barcode to each newly created item.

New Call Number Parsing Routine for Printing Item Spine Labels

A new call number parsing routine, "parse_call_no_852_form" is now available and can be used for printing item spine labels. This routine parses call numbers created by using the '852 Special Form' according to the following algorithm:

- Concatenate sequential subfields \$i into a single subfield \$i.
- Break call numbers for each subfield, "^" (caret) and space.

Enhancement to the Item Call Number Duplication Check to Check for Duplicate Titles

Previously, the Call Number Duplication Check only looked for items with the same call number but a different title (a different ADM record). If one was found, the user was blocked from adding the item. Now, the check also looks for items with the same call number and the same title (the same ADM record). If one is found, a message is displayed informing the user, but the user is not blocked from adding or updating the item.

Item Barcodes Print in Windows 7, 64 Bit

It is now possible to print item barcodes in Windows 7, 64 bit.

Sort Items by Copy ID

Routine 16 sorts items by the following hierarchy of an item's chronology, enumeration, and copy ID (ascending and/or descending order)

New Barcode Fonts to Support IE 9

It is now possible to view and print barcodes when using IE 9. To do so, replace the existing barcode fonts in the relevant XSL with the new fonts in the windows system directory.

Expand from Item Barcode

This option allows users to enter a barcode and transfer the item's information from the item record to the LKR subfields of the bibliographic record. If localization is needed, add the following lines:

- .\catalog\tab\lng\menu.dat: EXPAND_FROM_BARCODE Expand From Item Barcode
- .\catalog\tab\lng\hint.dat: EXPAND_FROM_BARCODE Expand the LKR field From Item Barcode
- .\catalog\tab\lng>window.dat: OpenArticleRecord. Title Expand From Item Barcode
- OpenArticleRecord. Static. Title Enter Item Barcode

Notification When Item Changed to be Part of a Requested Group

When an item's information is changed from the Change Item Process Status or Change Item Info menus, a new check determines if the item is now part of a requested group. If it is, a notification displays indicating the new item is now a member of a like item group of an existing hold request.

Additional LKR Field Upon Item Enumeration and Chronology Modification

This new development supports the adding of an additional LKR field to the BIB record when modifying the related item's enumeration and chronology information.

Support for Additional Filters in the LKR Field

Additional filters are now available in the LKR field to filter items using all the available levels of numeration and chronology.

Advanced General Retrieval Form (ret-adm-03)

The Advanced General Retrieval Form can be run in parallel process (divided into cycles) to improve performance. This option is enabled only if the service is run without an input file. Instead of five value fields for each filter (as in ret-adm-01), there is only one field where it is possible to enter up to 20 values, separated by semicolons. For each filter, the user can include or exclude the listed values.

Inventory Summary (item-09) Corrected

Previously, when the Inventory Summary (p-item-09) batch process is activated from the History page of the Services menu, the selected item statuses are shifted by one position. For example, if there are item statuses a through d and statuses c and d are selected, statuses b and c are selected instead when the service form is opened from the History page. This has been corrected.

Running Multiple Simultaneous Instances of the Update Item Records Service (p-manage-62)

The new Process to Create parameter enables multiple instances of the Update Item Records manage-62 batch service to be run simultaneously in order to shorten the run time.

New Service for Creating Items for Detached Holding Records

A new batch service, Create Items for Detached Holding Records (item-13), has been created. This service receives an input file of Holding Records which are not linked to any item (in any ADM library) and creates an item for each. The new service is added in the Catalog GUI under Services—>Items, and must be run while connected to an ADM library. For each Holding record in the input file, it checks accuracy and eligibility for item creation. If it is accepted as accurate and eligible, it is reported as such. If it is run with "Update Database" set to "Yes", an item is created for each eligible HOL record.

ACQUISITIONS

Order Changes Alert

A warning message now displays when a user updates an order and then tries to move on to another order without saving the changes.

Order Closure Upon Arrival (Configurable by Institution)

A new option has been added that allows the automatic closure of monograph and standing orders after the order arrival is completed.

Item Update Date Changed based on Arrival Date (Configurable by Institution)

A new option has been added to update the Item Date field in the item record based on Order Arrival Date.

Order Form Recalculates Price

The order form now recalculates the price information when the unit price or number of units is changed.

Validation Checks on the Order Forms (Configurable by Institution)

Two new validation checks have been added for fields in both the order form and the multi-order form. Now, information entered in the Material Format and the Order Group fields can be compared to a pre-defined list of values set by the institution.

Vendor Address Added to Serials Check-in

A new column labelled Vendor Address has been added to the Order Information tab in Serials Check-in screen.

Renew Order Encumbrance

The Renew Order Encumbrances for Serials and Standing Orders (acq-06-b) service has been enhanced with a new field that enables the renewing of the encumbrance based on the invoice paid amount of the previous year.

New Fields Available in Print Acquisition Records

Several new fields have been added to Print Acquisition Records (p-acq-03) service. These fields are:

- Material Delivery Type
- Last User; BIB Status (STA\$\$a)
- Number of Retrieved Orders
- Total Number of Arrived Items

Load EDI Invoice in Preview Mode

A new batch service is now available called EDI Invoice Load – Preview (edi-12). The service is used to simulate an EDI invoice load without updating the system. It can point out possible actions and errors that may occur during an actual update of the database.

SERIALS

Order Information Tab Added in the Serials Module

A new tab called the Order Information tab has been added in to the Control>Group node of the Serials module. This tab displays, in a single line, all items that share the same enumeration, chronology, and order number.

Updating Holding Records Based on Item Arrival

A new method has been developed to automatically update the 86X fields in the holdings record when registering the arrival of items that linked to that holdings record.

Serial Pattern Settings

Several minor changes have been made in the support of pattern settings in the 85X/86X fields.

- The value "c" (combined) is now supported in the 853 subfield y
- The quarterly_combine pattern template has been fixed:

before:

853 L \$\$av. \$\$bno. \$\$u4\$\$vr\$\$i(year)\$\$j(season)\$\$wq\$\$ypm01,04,07/10

after:

853 L \$\$av. \$\$bno. \$\$u3\$\$vr\$\$i(year)\$\$j(season)\$\$wq\$\$ypm01,04,07/10

Changes to Print Claim Letters/Report

Two new fields have been added to the Print Claim Letters/Report (serial-44). Now the Order Unit field and Acquisition Method field can be included on any report. In addition, a new parameter has been added to allow the running of multiple instances of the report simultaneously.

SYSTEM

Search Terms Retained in Find Feature

Search terms are now retained in the GUI Search-Find feature when selecting a different base.

This functionality is relevant for the GUI-Search-Find-Advanced Search and Multi-Field search. The GUI-Search-Find-Multi base CCL search already supports retaining the search terms.

GUI Print Functionality

Several enhancements have been made to the GUI Print functionality. These include:

- Previously, the HTMLPrint Tray Icon did not always disappear after printing from GUI in "Normal Printing" mode. This has been corrected
- Previously, there was no log file for printouts sent to the printer. This has also been corrected
- The Htmlprint software has now been upgraded to version 9.10.
- The Tray icon can now be hidden based on a new setup variable.
- A new log file now records printouts sent to the printer, based on a new setup variable.

Print Daemon

A few changes to the Print Daemon have been made, including:

- Fixing problems where not all printouts actually print or are printed twice.
- Adding several messages in the print daemon log file (printd.log) in order to clarify

Print Preview Window Changes

Several changes have been made to the Print Preview functionality for viewing reports. These include:

- HTMLPrint 5.24 has been replaced by HTMLPrint 9.02.
- The Aleph preview window has been replaced by the HTMLPrint preview window. Now, the Print and Preview outputs are the same.
- When the number of printouts is larger than the preview limit, a message is displayed.
- The Close All message that used to be displayed for both Preview mode and Print mode has been replaced by the new messages described above.
- In the Preview mode, embedded IE options are not available in the new HTML Print preview window. For example: Text selection option and the View source option.
- When there is a long word with no spaces, both Preview mode and Print mode are cut off.
- When printing or previewing wide tables, the table might be cut off. In order to prevent this problem, define the following parameter in \Alephcom\Bin\HTMLPrint.ini:
 - [Options]
 - Scale=75 (Scale=100 is the default)

The change affects all printouts. There is no option to fit specific printouts only.

Browse HTML Added as a Print Option

A new print option has been added – Browse HTML. The new Browse HTML option enables to view files in HTML format in the Browser window. This mode can be used for copy/paste data before printing.

Note: When printing from the new 'Browse HTML' option, the system uses the IE print control and not the regular htmlprint software.

Email Alerts When Batch Service Completes

A new functionality to allow sending an E-mail alert to a staff user when a specific batch service is completed. Until now it was possible to send an alert for a job as part of a group (e.g., ACQ). The new functionality allows sending an alert for an individual job (e.g. ACQ-14).

Download/upload Files from/to the Server from Local PC

It is now possible to download or upload files from the server to the user's local PC station. A new window has been added to the Task Manager of all GUI modules. On the server side, uploading or downloading files can be done from three directories of each library: data_scratch, data_print and data_files. There are separate staff privileges for downloading and uploading.

New Method to Calculate “Undetermined Year” for Reports Purposes

Previously, when the short doc year (Z13-YEAR) was set to be taken from the 008 field (tab22) and the 008 field contained the "undetermined" letter "u" (such as 198u), the year's value is set to 0000. This has been corrected. Now, the "u" is replaced by zero and 198u will turn to 1980. *Note that the "undetermined" year (year that contains 'u') is used only when all the options based on tab22 are not valid.*

Improved Interoperability Between Aleph and SSO Systems

When using an SSO system outside of Aleph, the system stores patron information based on Aleph patron data as master patron data. Up until now, the SSO patron information can be updated only by using the p_file_03 batch service, which is usually run at night. This has several limitations:

- Newly registered patrons cannot use SSO.

- When patrons change their password, they must still use their old password on SSO.
- When patrons change their address, they cannot use the system that utilizes addresses via SSO.

Aleph has been enhanced to provide the required information for the SSO system by writing messages into a new Oracle queue table. A new Oracle queue table, Z503, has been added. This table reflects changes in patron data made in Aleph in real time. The following patron-related events, initiated in the Web OPAC and PC GUI are recorded:

- Registration of new patrons
- Update of patrons' addresses
- Update of patrons' passwords