

South Dakota Library Network

ALEPH v21

Staff User Upgrade Information
Circulation and ILL



South Dakota Library Network
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Modified for SDLN
Version 21

ALEPH v21 New Features - Circulation

Circulation

- Audio Alert – Return Item on Hold (v20)
- New option – circulation request refusal
- Return Load Patron (v20)
- Email validation check – tab100
- Log for patron record changes – new report
- Accrued fine total display
- Popup loan note
- Delete lost items – new report
- HTML format emails
- New filters for cash-06 report - patron status, patron type, active patron
- New display of patron blocks when returning/loaning

ALEPH v21 New Features - Circulation

Audio Alert – Return Item on Hold (v20)

- A new variable, OnHoldReturn= has been added to the PC file: circ.ini
- It enables the playing of a specific audible alert when an item on hold is returned in the circulation module
- See “Changing Client Sounds” for information on how to enable sounds:

<http://www.sdln.net/staff/TrainingDocs/Systems/Changingclientsounds.pdf>



ALEPH v21 New Features - Circulation

Here is the new line in circ.ini [Error Action] section

```
[ErrorAction]
NoUser=N
NoBorrower=N
LoanError=N
ReturnError=N
UserError=N
ItemError=N
ClaimReturn=N
LostReturn=N
LoanDenied=N
ReturnDenied=N
ItemTransfer=N
ItemRequested=N
LoanSuccess=N
ReturnSuccess=N
OnHold=N
UserVerification=N
RemoteReturn=N
ReturnAllItem=N
OnHoldReturn=N
```

ALEPH v21 New Features - Circulation

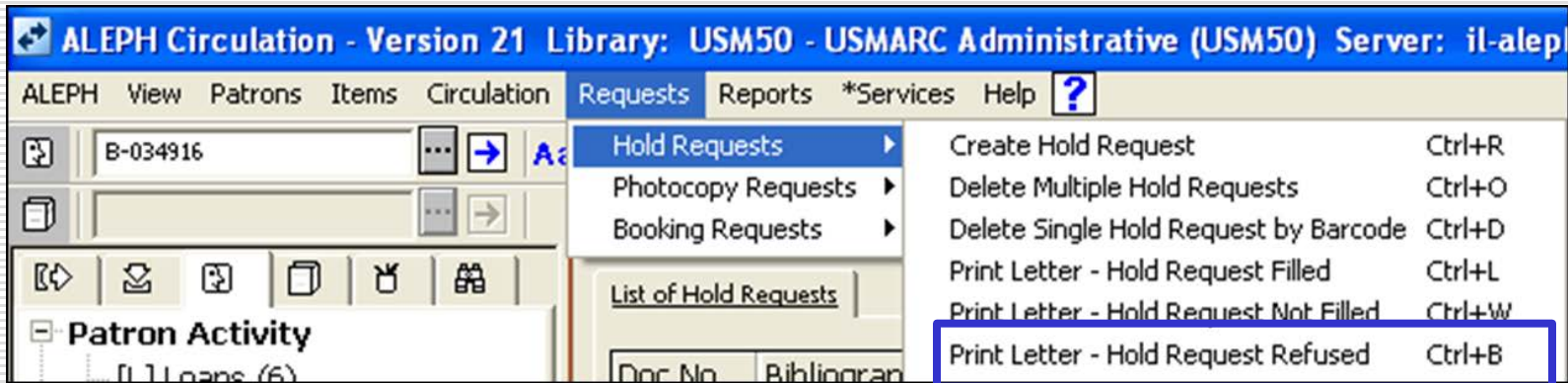
New option – circulation request refusal

- It is now possible to refuse hold, photocopy, and booking requests
- A new option has been added to the Requests menu in the Circulation module – Print letter - refusal
- This option enables the printing of a refusal letter, including the refusal reason
- The request is moved to the History log with Refused status
- A Circulation Logger record is created, including the refusal reason

ALEPH v21 New Features - Circulation

New option – circulation request refusal

Here is the hold requests menu in version 21



The "Refused" letter also exists for photocopy requests and Booking Requests

ALEPH v21 New Features - Circulation

Return Load Patron (v20)

- A new variable, ReturnLoadPatron, has been added to the PC file: circ.ini
- It enables loading patron information after completing the Return action
- To activate this feature, add the following lines to circ.ini:

```
[Return]  
ReturnLoadPatron=Y
```

ALEPH v21 New Features - Circulation

Return Load Patron (v20)

- Possible values: Y/N
- Y - Supports the new functionality: load patron context after return is done
- N - Default. Maintain the current functionality: return does not load patron context
- Note! This feature refers only to the Return action activated via the Return tab

ALEPH v21 New Features - Circulation

Email validation check – tab100

- New functionality has been added to check the validity of a patron's e-mail address
- The following new tab100 flag has been added: EMAIL-VALIDATION
- Possible values for EMAIL-VALIDATION: Y / N
- Y: The system performs a patron's e-mail validation check and displays a message if the e-mail address is not valid (warning message, not a block)
- The check is activated when the patron address is updated and the e-mail field is populated
- It is performed when the address is updated via GUI, OPAC, PLIF loader, DLF-API, and X-services
- N: Default. No validity check is performed

ALEPH v21 New Features - Circulation

Email validation check – tab100

If the flag is set to Y, the validation includes:

- Syntax check
 - Existence of only one “at” symbol (@)
 - Existence of a dot after the “at” symbol (@)
 - No space in the e-mail address
- Domain existence check: a check confirming that the remote server exists

ALEPH v21 New Features - Circulation

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 one of the following is added, updated, or deleted in the patron record :
 - global patron record
 - local patron information
 - address information
 - patron IDs

ALEPH v21 New Features - Circulation

Log for patron record changes

The following new components have been added:

- A new ORACLE table, Z307 of usr_library, for recording changes made on patron's related entities
- A new configuration table, tab_patron_log.eng, which defines the actions that trigger patron log creation (Z307)
- A new batch service, cir-27, which produces a report of changes made for patron records

ALEPH v21 New Features - Circulation

Log for patron record changes

Patron Record Log Changes Report (cir-27) - USM50

* Output File: changes_20120103

Patron ID: []

Change Date (From): 03/01/2012

Change Date (To): 03/01/2012

Log Type: All

- Update global Patron - Details
- Update global Patron - Blocks
- Update local Patron - Details
- Update local Patron - Blocks
- Update local Patron - Privileges
- Update Patron ID Info

Report Format: Standard

Runtime: Today

At: [] O'clock: []

Library: USM50

Here we are retrieving all changes for all patrons made on Jan. 03, 2012

ALEPH v21 New Features - Circulation

Log for patron record changes

The changes appear in the report

03/01/2012
patron-change-report-00

Patron Record Log Changes Report

Active (ADM-)Library: USM50
Patron ID: ALL
From Date: 03/01/2012
To Date: 03/01/2012

Patron ID	Date/Time	User	Change Info
00000012	03/01/2012 05:02:55	MASTER	New patron ID created
00000012	03/01/2012 05:01:11	MASTER	Update of patron addresses
00000012	03/01/2012 04:59:33	MASTER	Update of local patron record-Details
00000012	03/01/2012 04:58:42	MASTER	Update of global patron record-Details

ALEPH v21 New Features - Circulation

Accrued fine total display

Adding a display of the accrued fine on overdue items that haven't been returned yet.

The accrued fines are added to the following screens:

- Patron information in the loan session screen
- Patron information in the return session screen
- Patron's cash list screen

ALEPH v21 New Features - Circulation

Loan Session: Patron Lisa Michaels has overdue items with the accrued fine of 3.50, currently owing 2.00



Return Session: if you return the item with the accrued fine, the balance will be updated and the Accrued fine set to 0.00.



ALEPH v21 New Features - Circulation

Cash List: If there are overdue items that will create a fine after return, you will see the current amount of accrued fines here.

The screenshot displays the 'Active Cash' section of the ALEPH v21 interface. The table below shows the following data:

Bibliographic Info	Description	Credit	Debit	Net Amount	VAT	Date	Status	Item Sublibrary	Cash Sublibrary	Item Status	Collection	Loan	Due
Tun-huang hsueh /	Loan		2.00	2.00	0.00	2012/06/28	Not paid	East Asian Library	East Asian Library	On order	General	2012/06/28 1531	2012/07/26 2359
	Late return <0007 0000 D. 50>		3.50	3.50	0.00	2012/08/02	Not paid	East Asian Library	East Asian Library	On order	General	2012/06/28 1531	2012/07/26 2359

Summary section:

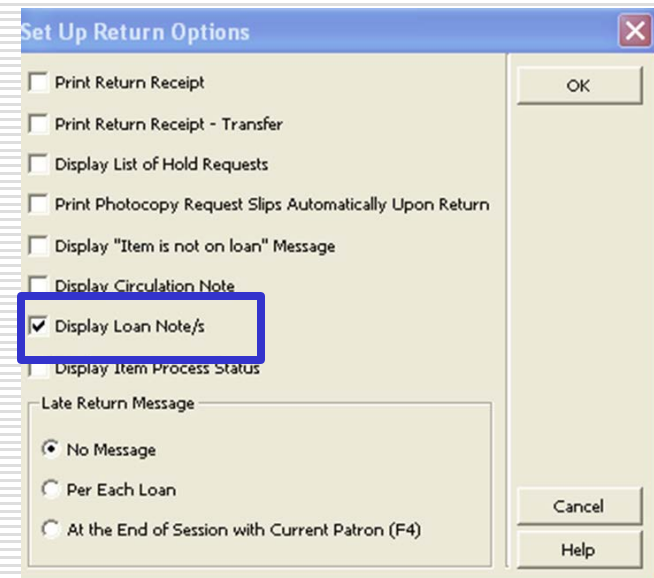
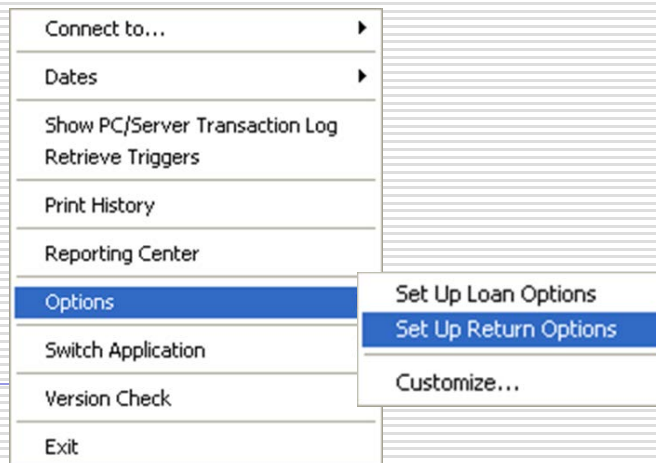
- Accrued Fine: 0.00
- Subtotal: -3.50
- Sum to Pay: 5.50

ALEPH v21 New Features - Circulation

Popup loan note

Aleph is enhanced to display the 'loan note' as a pop-up message as part of the 'return item' workflow.

Check the new Return Option
Display Loan Note/s



ALEPH v21 New Features - Circulation

Delete lost items – new report

When a loan is declared “Lost”, the patron is obliged to pay a fee according to the library’s policy. The loan status is changed to “Lost”.

Staff manually deletes the loan from the patron's loan list and changes the item process status to Withdrawn or another relevant process status.

These steps are often missed, causing the lost item to remain on the patron loans list indefinitely. This complicates maintenance of the database, since the item record cannot be deleted and the items will not be withdrawn in a timely manner.

Now we are able to automatically delete all loans where the item has been claimed to be lost, and its cost was paid by the patron.

ALEPH v21 New Features - Circulation

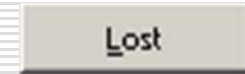
Patron 00000036 has a regular loan:



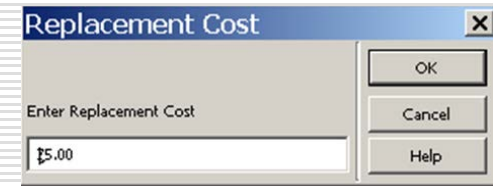
The screenshot shows the ALEPH v21 interface. The top menu bar includes 'ALEPH View Patrons Items Circulation Requests Reports *Services Help ?'. Below the menu, the patron ID '00000036' is entered, and the system displays 'Aadland, Dustin (00000036/B-034916) *Patron has Blocks/Notes*'. The 'Patron Activity' section is expanded to show '[L] Loans (6)', '[C] Cash (180.70 in debit)', and '[H] Hold Requests (10)'. The 'List of Loans' table is displayed with the following data:

Bibliographic Info	Due Date	Hour	Barcode
Best of country chicken /	2012/08/20	1635	50209-10

We highlight the loan and press on "Lost":



We enter the amount that the item costs:



The 'Replacement Cost' dialog box is shown with the following fields and buttons:

- Field: Enter Replacement Cost
- Value: \$5.00
- Buttons: OK, Cancel, Help

ALEPH v21 New Features - Circulation

Now instead of "Due Date" we see "Lost":



The screenshot shows the ALEPH v21 interface. The top menu bar includes: ALEPH View Patrons Items Circulation Requests Reports *Services Help ? The main window displays the patron information: 00000036, Aadland, Dustin (00000036/B-034916) *Patron has Blocks/Notes*. The left sidebar shows 'Patron Activity' with sub-items: [L] Loans (6), [C] Cash (260.70 in debit), and [H] Hold Requests (10). The main content area shows a table with columns: Bibliographic Info, Due Date, Hour, and Barcode. The table contains one row: Best of country chicken /, Lost, and 50209-10.

Bibliographic Info	Due Date	Hour	Barcode
Best of country chicken /	Lost		50209-10

At this stage, if the patron owes money for this item, we pay the relevant sum. Otherwise, cir-84 will not handle this loan/item.

ALEPH v21 New Features - Circulation

First run cir-84 with update-database=N:

Report / Delete "Lost" loans (cir-84) - USM50

* Output File

Sublibrary

- All
- The Gush Etzion Intl. Library
- Medicine Library
- East Asian Library
- Humanities Library
- Main Undergraduate

Patron Statuses

- All
- Officer
- Staff
- Graduate student
- Undergraduate student
- Extension School degree candidate

Change to Item Process Status

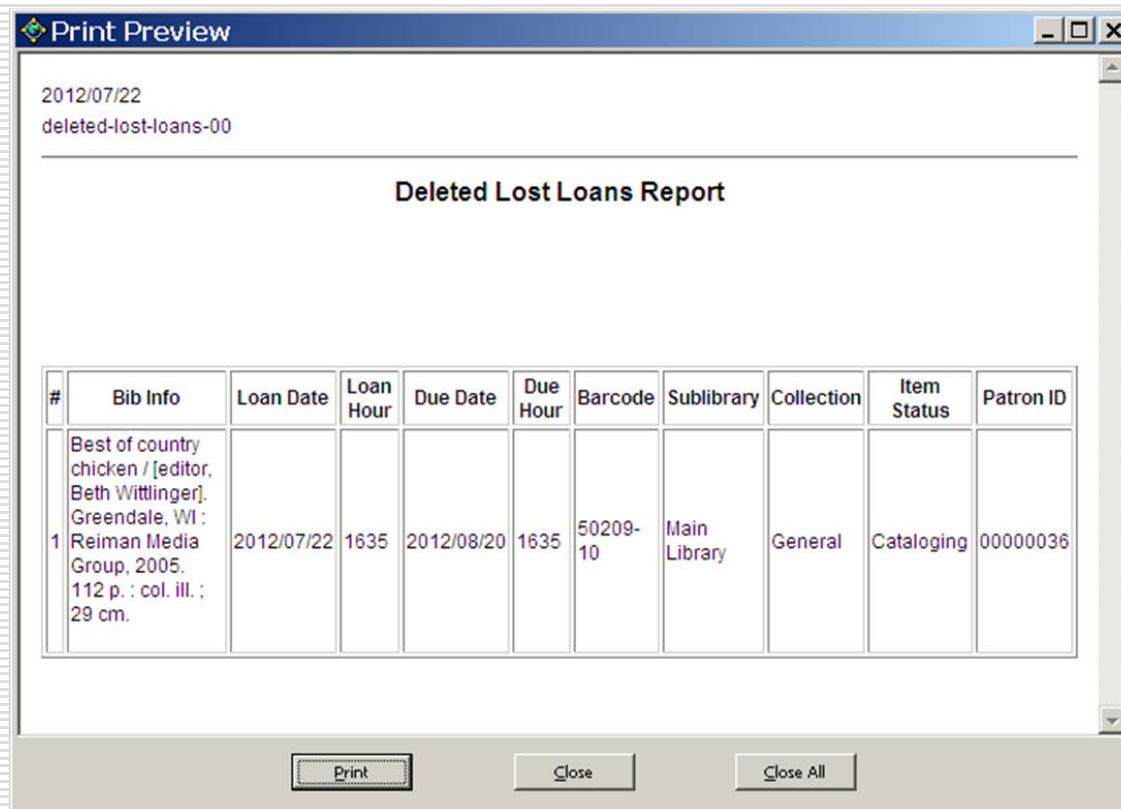
Update Database?

No

Yes

ALEPH v21 New Features - Circulation

You will get a report like this:



The screenshot shows a 'Print Preview' window with a title bar containing a printer icon, the text 'Print Preview', and standard window controls. The main content area displays the date '2012/07/22' and the report title 'deleted-lost-loans-00'. Below this is a horizontal line, followed by the report title 'Deleted Lost Loans Report' centered. A table with 10 columns is shown below. The columns are: '#', 'Bib Info', 'Loan Date', 'Loan Hour', 'Due Date', 'Due Hour', 'Barcode', 'Sublibrary', 'Collection', 'Item Status', and 'Patron ID'. The first row contains data for a book loan that has been deleted. At the bottom of the window are three buttons: 'Print', 'Close', and 'Close All'.

#	Bib Info	Loan Date	Loan Hour	Due Date	Due Hour	Barcode	Sublibrary	Collection	Item Status	Patron ID
1	Best of country chicken / [editor, Beth Wittlinger]. Greendale, WI : Reiman Media Group, 2005. 112 p. : col. ill. ; 29 cm.	2012/07/22	1635	2012/08/20	1635	50209-10	Main Library	General	Cataloging	00000036

ALEPH v21 New Features - Circulation

If you run cir-84 with update-database=Y, the report will look the same, but the loans will be deleted and the item-process-status is changed to "MS":

The screenshot displays the ALEPH v21 interface. At the top, the title bar reads "ALEPH Cataloging - Version 21 Library: USM01 - USMARC Bibliographic (USM01) Server". The menu bar includes "ALEPH View Cataloging Items Edit Actions Edit Text Record Manager Remote *Services Help ?". The main window shows a record for "BIB= 50209 ADM= 50209 - Best of country chicken / 0 Year:". Below this, an "Items List" table is visible:

Seq.	B-C	Sublibrary
10	50209-10	Main Library

The "Item Display" tab is active, showing the following fields:

- Barcode: 50209-10
- Sublibrary: WID
- Collection: GEN
- Copy Number: [empty]
- Material Type: BOOK
- Hol. Link: 0
- 85X Type/Linking Number: 0
- Call No. Type/Call No.: \$\$aTX750.5.C45\$\$bB46 2005
- 2nd Call No. Type/Call No.: [empty]
- Description: Loaded by batch

The "Item Process Status" dropdown menu is open, showing the following options:

- BD At bindery
- BP Bindery prep
- CA Cancelled
- CL Claimed
- CT Cataloging
- MI Missing
- MS Lost**
- NA Not arrived
- NP Not published

The "MS" option is highlighted in blue. A "Temporary Location" checkbox is also visible.



ALEPH v21 New Features - Circulation

HTML format emails

Emails from Aleph, up until v21, were in plain text, with an HTML file attached.

New drop down option is available in the Mail Attachment attribute, HTML Body Only.

	1	2	3	4
PLAIN-HTML		L Attachment only		H
PLAIN-HTML		L Email Body Only		P
PLAIN-HTML		L Attachment and Email Body		B
PLAIN-HTML		L HTML Body only		L

ALEPH v21 New Features - Circulation

For each patron we now have this new option:

Patron Registration

- [G] Global Patron Information
- [O] Local Patron Information
- [D] Address Information
- [T] Additional IDs

ILL Active Limit: 0140 Budget: []

Sponsor's ID: [] Profile: 00000036

Primary ID: [] Home Library: LAW

Proxy Type: 00 Dispatch Library: []

Data Export Consent

Mail Attachment: P

- H Attachment Only
- P Email Body Only
- B Attachment and Email Body
- L HTML Body Only

Here is for ILL Partners:

1. Partner Info | **2. Communication** | 3. Borrowing ILL Unit | 4. Lending ILL Unit | 5. Gen. Contact | 6. Ship Contact | 7. Bill Contact

Protocol Type: British Library Format Send Method: EMAIL

Server Address: [] Mail Attach (HTML): P

Institution Symbol: [] Letter Format: 00

- H Attachment Only
- P Email Body Only
- B Attachment and Email Body
- L HTML Body Only

ALEPH v21 New Features - Circulation

TAB100:

PLAIN-ONLY attribute included only two values:
"Y" and "N".

"Y" - Do not send an email attachment. Only plain text in the email body will be sent.

"N" - Send email attachments depending on the Mail Attachment definition.

New value, "H", was added to the PLAIN-ONLY attribute. This new value provides the ability for not sending an email attachment, Only HTML format in the email body will be sent.

ALEPH v21 New Features - Circulation

...\Alephcom\tab\Alephcom.ini

DefaultSendMethod= Possible values are
H (attached file), **P**(plain) or **B**(both).


Determines the default email method (html, both, plain) when no value comes from server, such as cases when the email was generated via the WEB OPAC.

Now we also have:

L (HTML Body)

ALEPH v21 New Features - Circulation

Send the "Patron Circulation Summary" by HTML email:

To:  Ori Miller
Cc:
Subject: Patron Circulation Summary

26/06/2012
bor-list-00

Patron Circulation Summary

Ex Libris University Libraries
222 Aleph Causeway
Chicago, IL 60614
thechoice@exlibris.co.il
Tel# 773.404.6527

Dustin Aadland
Garden St.
Boston MA 90917 90917

Patron ID: 00000036

Loans

Bib Info	Due Date	Description	Sublibrary	Collection	Call No. 1	Barcode	Proxy ID
DA962 .R4 Redmond, John Edward, 1856-1918. : Strong words from Mr. Redmond. : Treason to the home rule cause..	30/09/2011		Law Library	ILL Material	000000276	*1234*	
DA962 .R4 Redmond, John Edward, 1856-1918. -							

ALEPH v21 New Features - Circulation

New filters for cash-06 report

To increase the flexibility of the cash-06 service, by enabling the customer to filter by:

- Patron status
- Patron Type
- Active / Non active patrons

ALEPH v21 New Features - Circulation

The following new components have been added:

Notices to Patrons Owing Money (cash-06) - USM50

*Output File

Sublibrary

- All
- Exlibris Demo Libraries
- Medicine Library
- East Asian Library
- Humanities Library
- Main Undergraduate
- Law Library

Patron Status

- All
- Faculty
- Officer
- Staff
- Graduate student
- Undergraduate student
- Extension School degree candidate

Patron Type

- All
- Arts and Sciences
- Business School (student or employee)
- Central Administration (student or employee)
- College Library reserves
- Cataloging and processing
- Cross registered students

Include only Active Patrons

No

Yes

Patrons Who Owe More Than

True on Date: 20/06/2012

Report Format: Debt Notice

Runtime: Today

At: O'clock:

Library: USM50

Print ID:

Submit

View History

Cancel

Help

Add to History

ALEPH v21 New Features - Circulation

New display of patron blocks when returning/loaning

Patron related blocks will be displayed as part of the return and loan sessions. In addition - when patron retrieved in the patron bar - the upper bar display will include indication regarding the existence of blocks and notes.

The following has been added:

- A new label "Patron Blocks" in the user details
- A Message *Patron has Blocks/Notes* to indicate existing blocks and notes

ALEPH v21 New Features - Circulation

Patron has a global block

1. Global Patron Details | 2. Global Blocks and Notes

Global Block 1:	01	00	Patron has no global blocks.
Global Block 2:	00	01	Patron consistently returns books late.
Global Block 3:	00	02	Disruptive behaviour in library
Global Note 1:		03	Personal item left in library - contact Circ desk
Global Note 2:		04	Too many Claimed Returned Items
Global Note 3:		50	New patron self registration - Web OPAC.
Additional Note 1:		53	Patron to contact academic adviser
Additional Note 2:			

"Patron Loader" Protected Fields:

- Complete Record
- Patron Address
- E-mail Address
- Patron Status
- Expiration Date

1. Global Patron Details | 2. Global Blocks and Notes

Global Block 1: 01 Patron consistently returns books late.

ALEPH v21 New Features - Circulation

When calling up the patron for loan or return a note in the upper bar indicates, that there are Blocks/Notes.

The screenshot displays the ALEPH v21 interface for a patron record. At the top, the patron's name and ID are shown: "Lisa Michaels (50/50)". A red box highlights the message "*Patron has Blocks/Notes*" next to the name. Below this, the "Patron Information" tab is active, and the "Patron Blocks" sub-tab is highlighted with a red box. A callout box with a black border and white background contains the text "Click on tab 'Patron Blocks' for details". A second screenshot below shows the "Patron Blocks" tab in more detail, with a red box around the "Global Block (1)" entry. The entry text reads "Patron consistently returns books late."

Local blocks may also be displayed and will display for all local levels at the same time.

ALEPH v21 New Features - ILL

ILL

- Receive multi-item ILL requests:
the functionality of receiving Multiple Items is available from the Receive button in the list of requests (Returnable Multi) and also under the Bulk Operation (Receive Returnable Multiple Items).
- Push to patron from ILL

ALEPH v21 New Features - ILL

ILL items are delivered to the requesting library

List of Requests

Title	Request No	Status	Last Activ	Msg	Rush
Library science for programmers (Vol 1 and 2).	1080	Sent to supplier	29/11/11		When convenient

We will receive and move to the "items" tab

Locate
Send
Receive
Return
Response
Print

Receive Returnable Material

1. Request 2. Items

Date Received: 28/11/2011

Media Arrived: Printed (Loan)

Expected Return Date: 26/12/2011

Item Status: 72 Home Loan (02)

Supplier Currency:

Supplier Cost: 0.00

Supplier Local Cost: 0.00

Patron Local Cost: 8.50

Note:

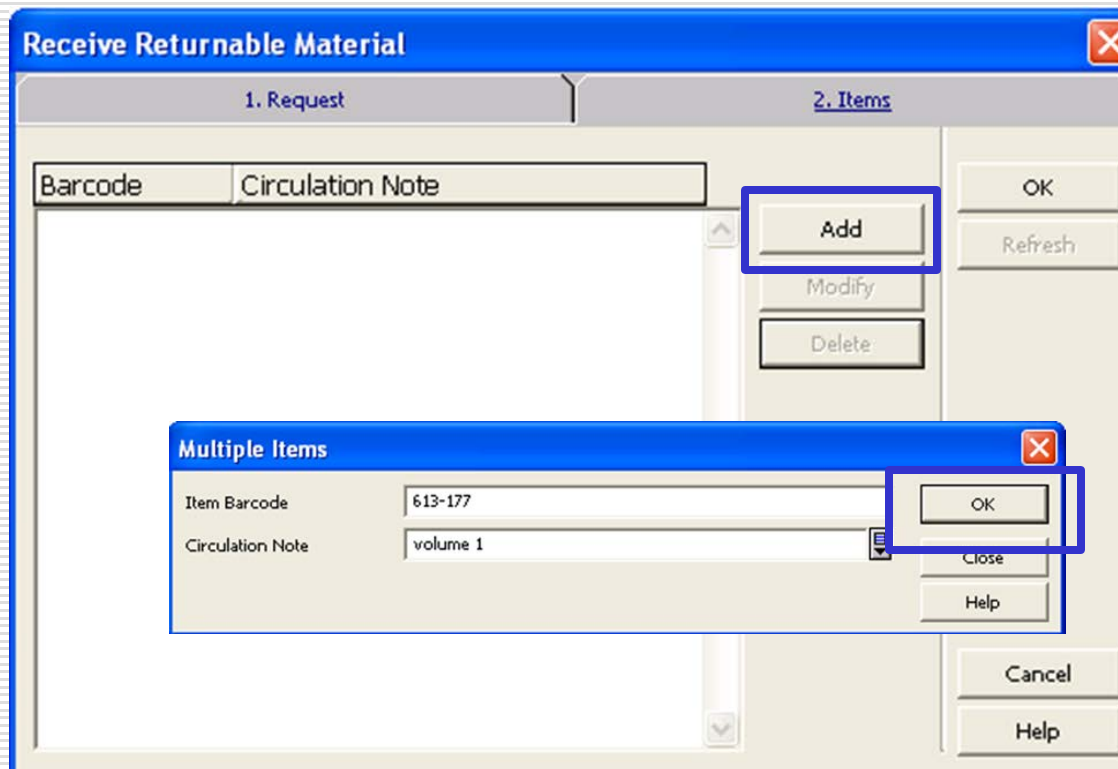
Shelving:

Send Received Letter To Supplier

OK
Refresh
Cancel
Help

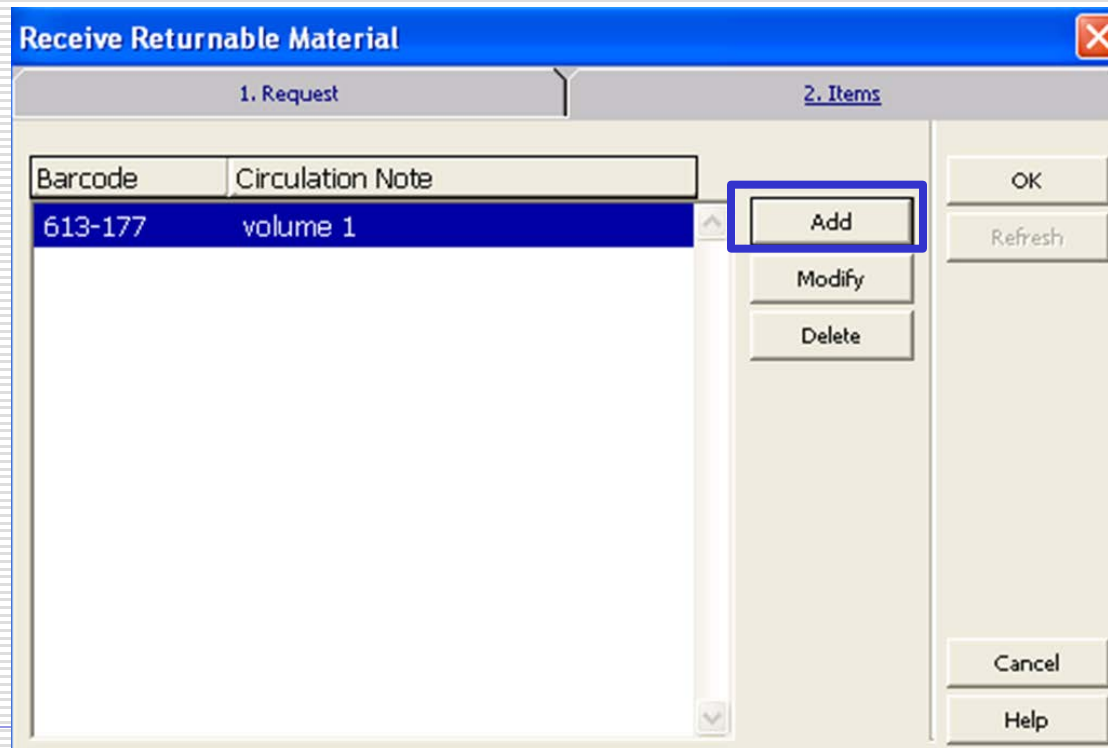
ALEPH v21 New Features - ILL

After clicking "Add" the "Multiple Items" window opens to begin receiving



ALEPH v21 New Features - ILL

Because it is multi item we will click "Add" again.
If it was single item we would click "OK" here.



ALEPH v21 New Features - ILL

Now that we have received both items for the one request we will click OK

Receive Returnable Material

1. Request | 2. Items

Barcode	Circulation Note
613-177	volume 1
248-177	volume 2

Buttons: Add, Modify, Delete, OK, Refresh, Cancel, Help

ALEPH v21 New Features - ILL

Both items appear in the arrival letter

We would like to inform you that your ILL request item(s) have arrived to the library.

Please come to the library at your earliest convenience to pick up the item(s)

Item status: ILL Home Loan
Pickup location: Home address
Due date: 23/12/2011
Supplied media: Printed (Loan)

Item:

Item barcode: 613-177

Circulation note: volume 1 ←

Item:

Item barcode: 248-177

Circulation note: volume 2 ←

Sincerely,
ILL Department

ALEPH v21 New Features - ILL

An arrival slip appears for each item

Request Details:	
Jones, Alice. Library science for programmers (Vol 1 and 2). New York : : Library press, 2011..	
Patron Name	Kortick, Yoel
Request No.	1080
Request Date	29/11/2011
Material Arrival Date	29/11/2011
Item barcode:	613-177 ←
Pickup location:	Home address
Circulation note:	volume 1 ←
Cost:	8.50
Due date:	23/12/2011
Supplied media:	Printed (Loan)

Request Details:	
Jones, Alice. Library science for programmers (Vol 1 and 2). New York : : Library press, 2011..	
Patron Name	Kortick, Yoel
Request No.	1080
Request Date	29/11/2011
Material Arrival Date	29/11/2011
Item barcode:	248-177 ←
Pickup location:	Home address
Circulation note:	volume 2 ←
Cost:	8.50
Due date:	23/12/2011
Supplied media:	Printed (Loan)

ALEPH v21 New Features - ILL

Push to patron from ILL

Now we are able to 'jump' from ILL borrowing requests tab to patron tab of the Circulation module, in order to view the requesting patron's details.

This will give staff the ability to easily check patron's details, and will improve the link between the ILL and Circulation modules.

ALEPH v21 New Features - ILL

This button will be enabled for each borrowing request

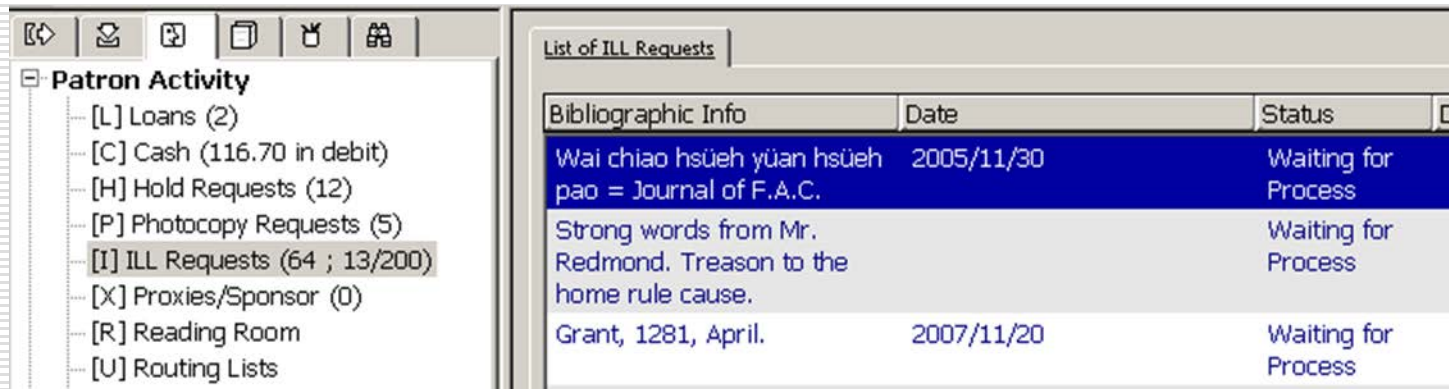
Title	Request No.	Status	Last Activity	Msg	Rush
Glimpses of the Harvard past / Bernard Bailyn ... [et al.]	404	Locally owned	2007/05/16		When convenient

Sort Type: Request Number

Buttons: Locate, Send, Receive, Return, Response, Print, Delete, Change Status, Copyright, Push Circ, Push Item, Push Patron

ALEPH v21 New Features - ILL

Upon pressing this button, the GUI Circulation module will be opened in "Patron ILL requests" node, displaying the requesting patron's information:



The screenshot displays the ALEPH v21 GUI. On the left, the 'Patron Activity' sidebar lists various activity types: [L] Loans (2), [C] Cash (116.70 in debit), [H] Hold Requests (12), [P] Photocopy Requests (5), [I] ILL Requests (64 ; 13/200), [X] Proxies/Sponsor (0), [R] Reading Room, and [U] Routing Lists. The 'List of ILL Requests' table on the right shows the following data:

Bibliographic Info	Date	Status	D
Wai chiao hsüeh yüan hsüeh pao = Journal of F.A.C.	2005/11/30	Waiting for Process	
Strong words from Mr. Redmond. Treason to the home rule cause.		Waiting for Process	
Grant, 1281, April.	2007/11/20	Waiting for Process	