ELUNA 2006 – June 5, 2006
Notes from presentation

In the opening session an indication was given that the support structure for north America will be increased, and is the only division of the company that has undergone significant recruitment / growth in the time since the last NAAUG.

Course reserve module will be re-integrated with the GUI in version 18 (0r 19?) More on this in the product discussion

ILL module will be rewritten and incorporated with the GUI client

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10:30-12:00
ALEPH PRODUCT FEATURE
Ballroom B/C
Ex Libris Presentation of ALEPH developments *Susan Pastore, V.P. Sales, Ex Libris U.S.; Chris Holly, Sales Executive, Ex Libris*
ALEPH Versions 19 and 20
Carmit Marcus, Director, Strategic Accounts, Ex Libris
Changes to the ALEPH Enhancement Process
Patricia Hatch, ALEPH Enhancement Coordinator, Harvard University; ALEPH Product Planning Group, Moderators
The single plenary session devoted to the ALEPH product. This session will focus on ALEPH Versions 18, 19, 20 and ALEPH Enhancements. First, Ex Libris will provide an overview of new features available in this release. Then, Ex Libris will provide an update concerning releases 19 and 20. Finally, the ELUNA ALEPH Enhancement Coordinator will lead a discussion on changes to the ALEPH Enhancement Process.

Susan Pastore – Ex Libris team introductions
Carmit Marcus – director or strategic accounts, NA; working on Primo partnerships
Chris Holley – Sales; previous background in training; now covering Eastern US in sales; second job is training in Aleph presentation skills

Release dates:
Aleph 19 – December 2007
Aleph 20 – December 2008
Also Patty Hatch

Future of Aleph

Version 18 demo – Chris
- New functionality
- ELUNA Enhancements
    - CAT-19-01 – tree structure of records; moving items / orders
        - 'expand all' in tree
        - Display of 750 items
        - Cut and paste can be used, not just drag and drop when moving items from one holdings to another (tab_move_record in BIB)
    - Circ
        - Payment identifier – may be an electronic transaction
        - Partial waiving of fines on multiple items

- Differentiation between transactions closed with payment and those closed by waive or transfer
- Automatically waive the lost bill (tab 100 LOST-LOAN-CREDIT-METHOD)
  - SYS18-01
    - Emailing options from the patron global record, per patron –for determining attachments or no
      - Can this be set on the patron load?
  - ACQ – Line items
    - Bib info wil now display on the leve of line tem
  - OPAC 18-01
    - Browse and keyword in single menu, or still separated if desired
    - Display summary holdings (18-02)
  - SER-18-02
    - Anywhere items are located – ability to delete multi items in your item list (with standard system checks)
  - Item changes – more causes recorded as far as what changes have been made
  - Circ log available in all item displays
  - CIRC
    - Dynamic recall – online recall
      - Can actively do spur of moment and tell you what the new date is AND send the appropriate recall letter
  - ELUNA #11
    - Changes in global change fields available in the form and service
  - ELUNA #12
    - Ambiguous headings
      - 2nd and third positions of tags taken into consideration
    - Updating a heading from the authority file "authorities correct" functionality
    - Sorting of heading derived from the fix_doc_aut_duplicate
    - Auth control on 1xx/240 and 1xx/243
- Select additional features
  - OPAC
    - New hold request functionality through MyEShelf
      - Can setup a parallel group – will accept any edition of a title
      - Serial group- can specify the order desired – watch a video before reading a book, etc.—reordering possible
      - Entire group – place request on an entire group on a basket of items
    - Renew options
      - Additional column to provide reason for non-renewal
      - My Library Card
    - Message instead of exact match in browse search 'my result would have appeared here

- RSS or SDI delivery (email)
- Enabled Google indexing
- Open Search enabled by JBoss server (A9.com)
- SuperCJK Support
  - Five characters of Unicode
- GUI
  - Alephcom.ini will allow setup of broken line to help highlight active pane
- Cataloging
  - 13 digit ISBN
  - Search headings allows choice of base in own system or via z39.50
  - Hot key control + G to let you toggle through editor windows
  - Can see title with system number
  - P-ret-01 allows for Boolean operator NOT to be used
  - Enable deletion of COR(corrected) fields from authority records
- Circulation
  - Automatic removal of lost, missing or other processing statuses
  - Multiple renewal of selected items, not whole list
  - Position in hold queue for items requested in list – staff view
  - Fast patron registration form – added fields can choose your additional id
  - Services
    - Override report – events logged when someone goes into password override situation
    - Notices to patrons owing money has been enhanced with sublibrary and date filters
- Acquisition –
  - pop-up for ID of items with hold requests for when the item is arrived in acq; optional through acq.ini
  - Services
    - In order index rebuild – option to exclude certain statuses from index
    - Transfer of orders from one budget to another
- PDQ – patron direct queue
  - Share a single catalog in multi adm environment
  - Patron registration at consortium level
  - Title requests are managed in the queue through various suppliers through the roster that the consortium creates
    - Means patron can loan and return anywhere
    - Can generate reports across system
- Integrated ILL
  - ISO ILL Functionality has been incorporated in the client
  - Unmediated processing for borrowing and lending workflows
  - Minimal maintenance and setup requirements; will integrate more closely and seamlessly with circ workflow
- Staff privileges

- More personal information included
- Blocking options
- Expiration dates
- Password structure
    - Setup minimum length
    - Character composition
    - Lock or disable if not used in a certain period of time
    - Expiration for password – periodic changing
    - Expiration for user accounts
- Administrative reports
- GUI interface changes
- Report and tracking
    - Summary of access rights - reports
        - Expiry date
        - Blocked users
        - Access rights
- More info on documentation center

Carmit notes: those who are planning to upgrade to version 18 should be referred to documentation and review what Susan has put up on the site

Version 18 and Beyond

In the beginning stages of development; many things are on the drawing board and may not be implemented

Goals:
- Reduce the TCO (total cost of ownership)
- Working with the ALEPH community
- Standards

- Staff interface for Aleph configuration tables
    1. Library open hours (v18) – appears in left panel node if so enabled to change this table
    2. Set basic and advanced parameters (tab17)
    3. Take into account table dependency
    4. Enable configuration by functional blocks / tasks
    5. Reduce need for specialized table knowledge
- batch operations
    1. scheduler
    2. log analyzer – search for log errors
    3. log files – modify log files to contain the information required by the log analyzer, batch queue and summary logs
    4. under analysis
- improvements are driven by users:
    - ELUNA enhancements

- IGeLU Ehnahcements
- GUI Focus group
- X-services interest group
- Eluna Course reserves group
- staff persmissions working group
- Standards
  - NCIP
  - SRU server support
  - z39.50
  - OAI
  - Aleph publishing module
    1. OAI
    2. Marc/XML
    3. publishing for Google
    4. consideration for high volume batch publishing
- Course reserve
  1. GUI integration
  2. address outstanding, underlying issues
  3. adapt functionality of the web module
  4. driven by working group and Ex Libris
- Staff permissions
  1. management of users in v.18
  2. Access rights and user interface workflow in v.19
- batch claiming for monograph orders
- dynamically change due date on recalled items
  - selecting filter options with an empty search string
    1. ability to use filter options to produce a list of results
    2. error message will still occur if search string and filter are empty
  - enabling the use of the OPAC while system is running maintenance jobs.
    1. can use type of index not being rebuilt
  - automatic change of loan period after a certain number of hold requests
  - z39.50 server usage statistics: logical base, indexes used, number of hits retrieved; time stamp; number of sessions; query submitted
  - patron initiated acquisitions request
  - Update aleph Acq with information from a finance system- i.e., to relay status of transaction file sent
  - staff authentication via x-service
    1. similar functionality in accessing staff menu

Aleph 19
- SMS server connectivity – communication options
  1. email
  2. snail mail
  3. RSS
  4. SMS

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- Unfulfilled PDQ requests to ill automatically-- (pass info to : Nigel / circ recalls)

ARC v. 2 will work with Aleph 16 and above
- Data warehouse
- Periodic ETL
- Web-based
- Additional fields for extract in version 19
    - Number of z-13 fields increased from five to thirteen

Version 20 – December 2008
- E-books
- Other eproducts
- Working with Aleph user community

Jane A: management of sending address through staff permissions versus each alephcom.ini

Patty Hatch – New Aleph enhancement process

Current problems
- Length of process
- Number of requests per module
- International group requests and comparisons
- Only small and few medium sized requests go through, not large requests which come through contract negotiations and special group formation

The new process
- Targeted area development
    - Will ID and target one area of concern to be developed over the next year, in conjunction with ELUNA and Ex Libris
    - Advisory group formed
    - May be one module, multiple modules, or multiple processes
        - May not be tied to one specific functional area / task

Call for proposals – July – September 2006
Group meets with Ex Libris February 2007
Added to the version November – December 2006
Development time cut to 18 mos.