ALEPH VERSION 18.01

Release Notes – An Overview

Ex Libris
© Ex Libris Ltd., 2007
Last Update: June 30, 2007
Document Version 1.3
Code: A-ver18-RLN-1.3
CONFIDENTIAL INFORMATION

The information herein is the property of Ex Libris Ltd. or its affiliates and any misuse or abuse will result in economic loss. DO NOT COPY UNLESS YOU HAVE BEEN GIVEN SPECIFIC WRITTEN AUTHORIZATION FROM EX LIBRIS LTD.

This document is provided for limited and restricted purposes in accordance with a binding contract with Ex Libris Ltd. or an affiliate. The information herein includes trade secrets and is confidential.

DISCLAIMER

The information in this document will be subject to periodic change and updating. Please confirm that you have the most current documentation. There are no warranties of any kind, express or implied, provided in this documentation, other than those expressly agreed upon in the applicable Ex Libris contract.

Any references in this document to non-Ex Libris Web sites are provided for convenience only and do not in any manner serve as an endorsement of those Web sites. The materials at those Web sites are not part of the materials for this Ex Libris product and Ex Libris has no liability for materials on those Web sites.
# Table of Contents

1. **PREFACE** ............................................................................................................. 4
2. **OPEN HOURS CONFIGURATION** ................................................................. 4
3. **PATRON DIRECT QUEUE** .............................................................................. 4
4. **THE “ALEPH” LEVEL PATRON PRIVILEGES RECORD** .......................... 4
5. **NEW ILL CLIENT** ............................................................................................ 5
6. **AUTHORITIES** .................................................................................................. 5
   - 6.1 Conflicting Headings – the “Categories” Mechanism............................... 5
   - 6.2 Correction of Tags and Indicators (for the MARC 21 format) ............... 5
7. **STAFF AUTHORIZATIONS** ............................................................................ 5
8. **MULTI-ADM RELATED DEVELOPMENTS** .................................................. 6
9. **SOME ADDITIONAL HIGHLIGHTS** ............................................................... 6
   - 9.1 Acquisitions .................................................................................................. 6
   - 9.2 Cataloging ..................................................................................................... 6
   - 9.3 Circulation .................................................................................................... 6
   - 9.4 Printing ......................................................................................................... 6
   - 9.5 Serials ............................................................................................................ 6
   - 9.6 Web OPAC ................................................................................................ 7
   - 9.7 System ......................................................................................................... 7
1 Preface

The purpose of this overview is to provide an overall picture of the changes included in version 18 and to highlight the most significant ones. For more information concerning the topics mentioned in this overview, read the detailed release notes and/or the ALEPH Staff User’s Guide and ALEPH System Librarian’s Guide.

The release notes are divided by broad functional modules and within each module by topics. The topics are arranged alphabetically. The release notes report in brief on changes in version 18 as compared to version 17. Note that the release notes generally include implementation instructions only for the changes that are not mandatory. Mandatory changes are handled by the Upgrade Express package and explained in the Upgrade Express documentation.

A number of version 18 developments have been downgraded to earlier versions. It is possible that some of the items described in the release notes are not new to your system.

2 Open Hours Configuration

The Circulation client in version 18 includes an easy-to-use interface for updating the library’s open hours table - tab17. The “Library Open Hours Management Interface” is designed to enable circulation staff to view and update the library’s opening hours’ schedule without requiring the assistance of the system librarian. As such, it is part of Ex Libris’ ongoing effort to lower total cost of ownership.

3 Patron Direct Queue

Patron Direct Queue (PDQ) is a new feature that enables direct consortial borrowing. PDQ is suitable for multi-ADM or single-ADM sites that enable patrons from any member institution to request and borrow items from any other participating institution. Participating institutions should be willing to deliver items to a requested pickup location.

Refer to the ALEPH Staff User’s Guide and ALEPH System Librarian’s Guide for details on the functionality and setup of PDQ.

4 The “ALEPH” Level Patron Privileges Record

In version 18, there is a change in the functioning of the “ALEPH” level patron privileges record. This record is no longer created automatically and is now required only by multi-ADM sites that implement Patron Direct Queue (PDQ) or that want to enable cross-ADM circulation without requiring patrons to register at every library.
5 New ILL Client

There is a new ILL client that will be used in new ALEPH installations or by sites that have not previously used ILL. The existing ILL client continues to function. ¹

The main features of the new ILL GUI module (as compared with the “old” ILL GUI) are the integration of various methods of communication (configured per ILL partner), including mail, e-mail, ISO or SLNP protocols; a new administrative entity called an "ILL Unit"; and (optionally) a high degree of unmediated handling of ILL requests.

6 Authorities

6.1 Conflicting Headings – the “Categories” Mechanism

Conflicting headings are headings with identical text that derive from fields of a different nature (for example a 100 personal name field and a 150 topical term field). Until version 18, such headings would match and create the “conflicting headings problem”. In version 18, the “categories mechanism” was introduced to prevent matching across different types of headings,

Important note!

Implementation of the categories mechanism requires re-building of the headings in the BIB and AUT libraries and re-creating the links between the BIB and AUT libraries.

6.2 Correction of Tags and Indicators (for the MARC 21 format)

In version 18, the Authority Control mechanism has been expanded to include correction of bibliographic field tags and indicators based on the linked authority record.

7 Staff Authorizations

It is now possible to define password management policies, for example, setting a minimum length of the password and defining whether passwords need to be periodically changed.

In addition the staff records now include a number of fields about the staff user, for example, name, e-mail address and expiry date. These fields enable enhanced management of staff authorization records.

¹ Based on a new flag in $alephe_tab/tab100 - ILL-MODE.
8 Multi-ADM Related Developments

Version 18 includes some developments that are relevant to a multi-ADM installation:

- Print to ADM – this function enables you to place input and output files in the ADM library instead of the shared BIB library.
- Remove library – this function removes an ADM library from the installation.
- User (that is, ADM) library has been added to Patron Profile.

9 Some additional highlights

9.1 Acquisitions

There is an explicit “Claim Date” for Serial and Standing Orders. There are changes in the order, arrival and claim forms as well as in the Serial and Standing order claim reports.

9.2 Cataloging

- 13-digit ISBN is now supported by ALEPH
- There are several enhancements in the Overview Tree functionality
- Loaders:
  - It is now possible to load OCLC records using a batch process.
  - Loader logger. The system logs all loads from OCLC and MARCIVE

9.3 Circulation

- The system can be configured to remove automatically specific processing statuses when the item is circulated.
- Patron information can be restricted to appear only in the Circulation Module
- From version 18.1 the amount of time that the item is kept on the hold shelf depends on the pickup location and not the owning library
- There are a number of enhancements to the NCIP server.
- Online recall is now available for hold requests placed in the GUI.

9.4 Printing

It is now possible to define in the Patron, Vendor and Supplier records whether or not an HTML attachment should be sent.

9.5 Serials

Version 18 includes support for combined regularity patterns in subfield y.
9.6 Web OPAC

- It is now possible to set up a single menu which combines the search and browse options.
- A new library-configurable message can be shown where the requested query-string would appear in the browse results list if it were present in the database.
- It is now possible to place parallel or serial hold requests from the e-shelf.

9.7 System

It is possible to enable or disable the various elements of the system including the GUI modules, the batch queue, and the system daemons. This can be useful if there is a need to stop all or part of the system, for example, for maintenance purposes.

This is controlled via the UTIL W/5 utility, "View/Update Global System status. Please refer to the General chapter of the System Librarian’s Guide for more information.