

USER DOCUMENTATION (ALEPHINO 4.1) TRAINING MATERIAL

# **General overview and basic functionalities**



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### 1 Introduction

This document provides an overview of the design and structure of the system. It explains the first steps with the system and helps to understand the applications basic functionalities.

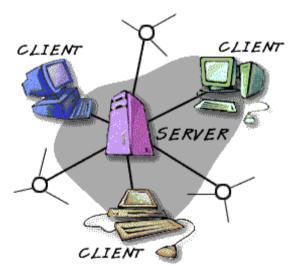
#### 1.1 Clients and Server

Alephino is a library automation system that supports and automizes many workflows in Acquistions, Cataloging and Circulation.

Alephino is designed as client server system. The application used by the library staff users is located on their PC. It's called the 'Alephino client'.

The database is located on a central server that is used by all clients.

When using the client interface, the staff users sends requests to the server, and receives responses back. The server sends database information to the clients, is responsible for writing changes of data into the database, and is responsible for keeping the data in a consistent structure.



Customization of the system can be done by using the Setup Client (which is included in the Web Service Module), and by changing client parameters. Please refer to the Online User Manuals to find more information on this.

## 1.2 Data structure

The Alephino database contains bibliographic records, authority records, holdings and administrative data, devided into different interlinked master files. Depending on the type of the records, the format of the records differs.

Bibliographic records, authority records and holdings records are stored in MARC21 format.

Administrative data are stored in Alephino format. Administrative records are for example items, acquisitions data like orders, invoices, vendors, and circulation data like partons, loans or requests.

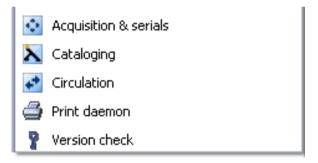
```
Data in standard format
                                        Administrative Data
(MARC21)
                                        (Alephino format)
                                        Items
                                        (M-MEX)
Title records
(M-TIT)
                                        Acquisition data
                                        (M-BST, M-LFT....)
Authority records
(M-AUT)
                                        Circulation data
                                        (M-BEN, M-VBU...)
Holdings records
(M-HOL)
```

The name of a master file which also appears in the clients is combined of the short name of the database (in this case M), and a three-letter code which stands for the file, for example: AUT for the authorities file.

#### 1.3 Modules

Alephino has a modular structure. There are clients based on Windows which have a graphical user interface – short GUI. These clients are used by the library staff users when they are working in Acquistions and Serials, Cataloging or Circulation.

After installation of the clients, any module can be started from the Windows start menu.



If one module is open, icons for the other ones appear at the bottom of the screen, within the operations bar. By clicking on these icons, the module will start or, in case that it is already open, it becomes the active one.





## **Acquisitions & Serials**

The icon with the four arrows represents the Acquistions and Serials module. This module includes ordering, inventory management, invoice handling, claiming and other acquisition related services as well as the serials management, where the staff user can manage

subscriptions, control issues and items, manage routing and claiming. Budgets, vendors and currencies are managed within this module.



# **\ Cataloging**

The cataloging module is used to create, update, duplicate or delete bibliographic records as well as authority records. In addition, holdings and items records are managed here.

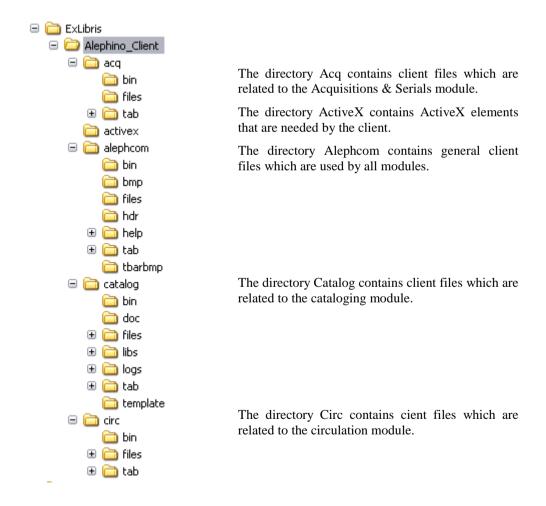


#### Circulation

The icon with the two arrows represents the Circulation module. In this module, loans and returns are performed, requests are managed, and patrons are administrated as well as cash transactions.

# 1.4 Directory structure (Client)

Usually the Alephino client is installed on the local drive. The following files exist in the Alephino client environment:



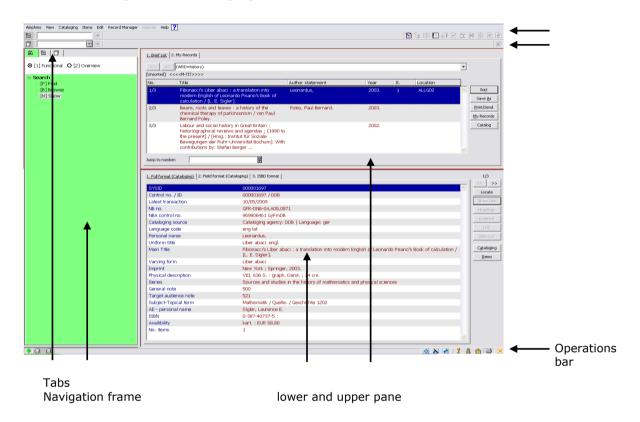
Below the directories ACQ, Catalog and Circ there are the directories 'bin' and 'tab'. 'Bin' contains the executable programs and 'tab' contains parameter files that are used by the client.

Directory		File	Used for		
Acq\					
	Bin∖		Acq.exe	Start the module	
	files\	M-TIT\	z.B.	Print	
			orderltr.prn		
	Help\	<lng>\</lng>	Help.hlp u.a.	Help files	
	Tab∖		acq.ini	Local module configuration	
			per_lib.ini	Master files used by the module	
			print.ini	Local print configuration	
	Tab∖	<lng>\</lng>	Accel.dat	Shortcuts	
			Error.dat	Client-error messages	
			Hint.dat	Information about the selected menu entry (status line)	
			Menu.dat	Entries in the main menu	
			Message.dat	Messages that appear when filling out forms Name of print files, ,Subject' for emails	
			Print.dat		
			Statusbr.dat	zur Definition von Alephino System-	
				Meldungen, die in der Statuszeile angezeigt	
				werden	
			Toolbar.dat	Icons in operations bar	
			Window.dat	Name of the fields that appear in forms	

# 2 Using the Alephino GUI

### 2.1 General elements of the GUI

This is an example of the cataloging module interface.



The screen is made up of three frames:

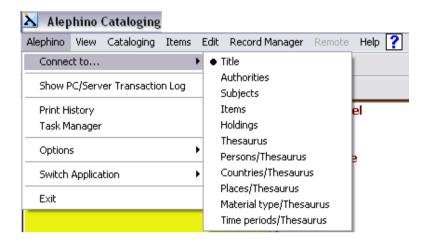
On the left hand you see the navigation frame. It is devided into three tabs which splits the modules into three areas. The cataloging module has a search area, a cataloging area, and an items area. By clicking on the tabs you can access the different areas of the module.

On the right hand, you see the upper and lower pane. The display of information in the panes is governed by the node selected in the navigation frame. The display can consist of a form, a list, or a record. The upper and lower panes change according to context.

The operations bar appears at the bottom of the screen.

#### 2.1.1 Menu bar

The menu bar provides the functionalities that have to be used very often, as well as some general functionalities which are part of all modules. The general functionalities are located in the menu called **Alephino**.



From this menu, the first entry is ,Connect to...'. You can connect to a specific file if you would like to search for records from this file or if you would like to catalog new records. For example, if you want to catalog new title records, you connect to the title file. If you want to catalog authority records, you connect to the authorities file. If you open a module, you will be automatically connected to the file which is most commonly used. For Cataloging, this is the title records file.

The second entry in this menu is ,Show PC/Server transaction log'. This can be used to display a log file for the communication between local client and central server. Usually it's not neccessary to monitor the communication between client and server. It only becomes important if the communication fails. In this case it may be useful to search the log for error messages.

The third entry of the menu is the 'Print history'. All files that are printed in one of the Alephino GUI module are saved in a "history" section in the operator's profile. The history print files can be viewed or re-printed. Each printout initiated from out a GUI window will appear later in the Print History of that Alephino module.

The fourth entry of the menu is the 'Task Manager'. The task manager is used to copy a remote file from the server to the local directory (so that you can update or print it). For example, claim letters for patrons have been created on the server, because an automatically claim report has been performed in the web service module. The print file appears in the file list of the task manager and can be transferred to the client. From there, the letters can be printed or send by email. We will talk about

The menu entry ,Options' is used to customize the interface, for example the background colour of the navigation frame.

The menu entry ,Switch Application' allows you to simply switch to another module.

The menu entry Exit' is used to close the module that is currently active.

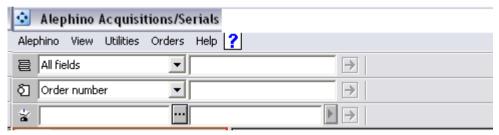
#### 2.1.2 Search bars

Below the menu bar you find at least two lines that can be used for the direct search of records.

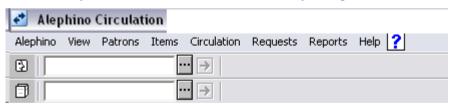
In the cataloging module, there is one line where you can enter the system no. of the title, and one line where you can enter the barcode or call number of an item. This functionality is called "Direct search" because the result of the search is exactly one match.



In the acquistions module, you find three direct search lines. The first one is for serials, the second one for orders, and the third one can be used for invoices. By clicking on the arrow next to the input field Alephino shows the criteria that you can select for search.

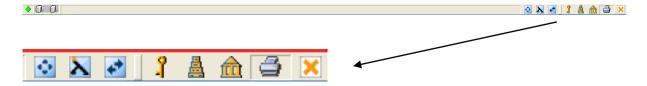


In the circulation module, you find two direct search lines. The first one can be used to search for patrons. You can search for patron ID or patron barcode. The second direct search functionality can be used to search for items by using the barcode or the call number.



#### 2.1.3 Operations bar

The operations bar appears at the bottom of the screen. Within the operations bar, you find some icons on the right side. By clicking on these items you can perform different functionalities.



The first three icons appear in blue and represent the modules of the system; from left to right it is Acquistions & Serials, Cataloging and Circulation. If you click on the icon, the module will be opened or, if already open, you will be switched to the module. The module from where you started is still present in the background so that you can return back easily.

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Next to the module icons you find the key icon. If you right-click on this icon, the name of the staff user you are currently working with appears. You can change the password of your user. If the PC is used by more than one person, you can login as another user. Once the user has been selected, it will be valid for the other modules that will be opened afterwards. Please note that the privileges of the staff users are defined via the Setup Services of the Web Service Module.

Next to the key icon you see the tower of Babel. If you right-click on this icon, you can select the interface language.

.

The next icon looks like a library. It can be used to connect to specific files if you want to search for records from this file or if you want to catalog new records. The file you are currently connected to appears on the title of the window on the top of the screen.



The next icon is the printer icon. If you right-click on this item, you can decide whether you want to printout immediately, or if you want to have a printout preview first. Another option is called ,View source' and shows the printout in xml structure. If needed, changes can be made in the xml file and saved afterwards, for example in a local directory c:/temp.



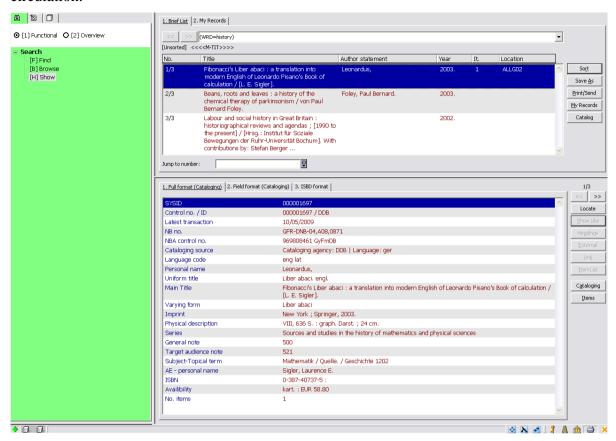
The close icon is used to close any module that is open.

#### **2.1.4** Navigation frame

The left frame of the screen is called ,Navigation frame. It is devided into tabs. By clicking on these tabs you go to different areas of the module. The following picture shows the cataloging module. You can see three tabs within the navigation frame, the left tab is to open the search mode, the second one is to open the cataloging mode and the third one is to open the items mode.

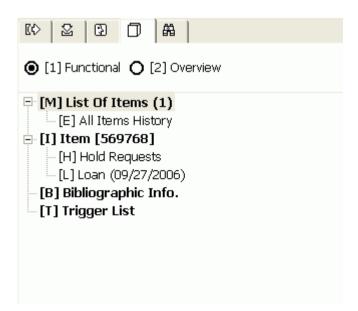
Below the tabs, you can see the different functions that are available for the mode you selected. You can switch between ,Functional' and ,Overview'.

The search tab is available in every module, you will find it as well in Acquisition and circulation.

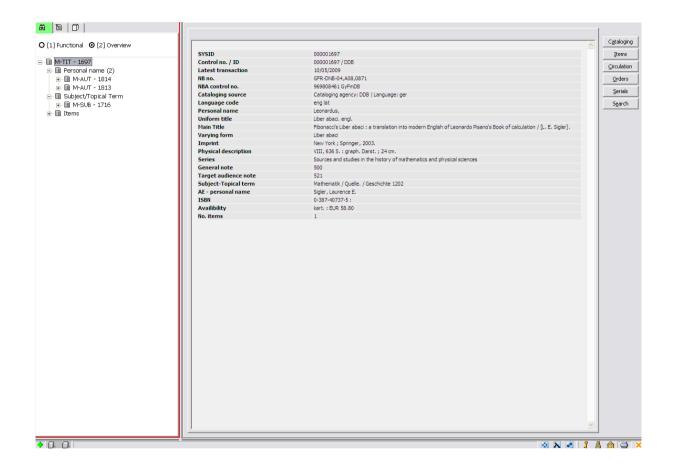


If you're working in functional mode, like it is shown in the example, you can see a functional tree that appears below. From here, you can select the function that you want to use just by clicking on it.

Just like menu commands, the nodes of the navigation tree activate different screen areas when clicked:



If you select 'Overview', you see the current record and all related records on one page, and you are able to navigate the records into different areas of the system, just by clicking on the buttons that are displayed on the right side of the screen.



# 2.2 Keyboard shortcuts for all Alephino GUIs

You can advance from one screen element to another by using the following shortcut keys:

<b>Shortcut Keys</b>	Lets you do this		
TAB	move to the next control in the dialog box.		
Shift+TAB	move to the previous control in the dialog box.		
Ctrl+TAB	move from the lower pane to the first control in the first toolbar.		
Ctrl+Alt+TAB	move from the first control in the first toolbar to the lower pane.		
Ctrl+1	move to the left pane, containing a tree.		
Ctrl+2	move to the right upper pane or to the left editor window in multiple view in Cataloging.		
Ctrl+Shift+2	move to the right editor window in multiple view in Cataloging.		
Ctrl+3	move to the right lower pane.		
Ctrl+4	move to the record manager (left lower pane) in Cataloging		
Ctrl+5	move to the first control in the top toolbar.		
Ctrl+6	move to the second control in the top toolbar.		
Ctrl+7	move to the third control in the top toolbar.		

Drop down lists opened with the icon can be used without a mouse as follows:

- To open a list, press F4.
- To select an item from a list, press Enter.
- To highlight an item on a list, use the arrow keys.
- To exit a list without selecting an item, press Esc.

Note that when selecting an item with the mouse, you need to double-click.

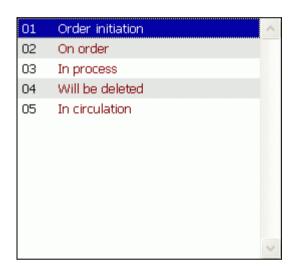
# 2.3 Expand windows invoked from forms

There are several different types of expand windows that are invoked from form windows (for example, the Arrival Form in the Acquisitions/Serials module):

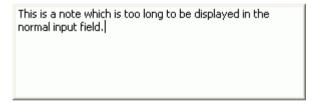
• A drop-down calendar invoked from a date field:



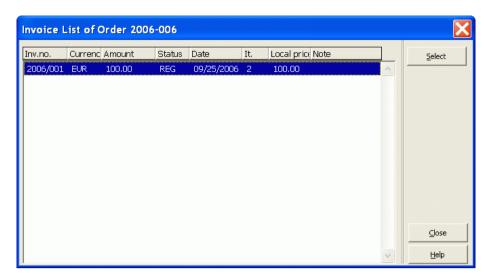
• A drop-down list that contains items which you can select:



• Long text in field. This is a rectangular box, in which you can type additional text:



• A separate dialog box:



These expand windows can be displayed in two ways:

- When the corresponding button next to a field on a form window is clicked.
- When the corresponding shortcut key is pressed.

These are the buttons and shortcut keys that correspond to each type of field:

<b>Description of Expand Window</b>	Icon	<b>Shortcut Key</b>
Drop-down calendar	<b>&gt;</b>	F4
Drop-down list	<b>&gt;</b>	F4
Long text in field	<b></b>	F3
Separate dialog box:		-

In order to use a shortcut key, the cursor must be in the corresponding field.

You can close any expand window by clicking the ESC key.

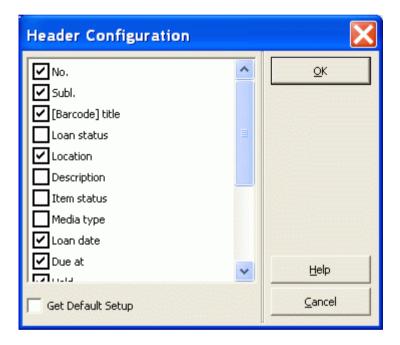
Note that you can use the TAB key to land on the button.

### 2.4 GUI Lists – Show/Hide columns

Most of the information available via an Alephino GUI is displayed in tabular or list format. In the following example taken from the Circulation module, when you click the Loans node from the Patron tab, the following list displays:



This list consists of information displayed in rows and columns. You can define which columns of information appear in the list. When you right-click any of the column headings in a list, the following dialog box appears:



As you can see, this list consists of information displayed in columns. To remove a column from the list, clear the corresponding check box. Select the Get default setup option to revert to the original settings. The original settings are stored on the server.

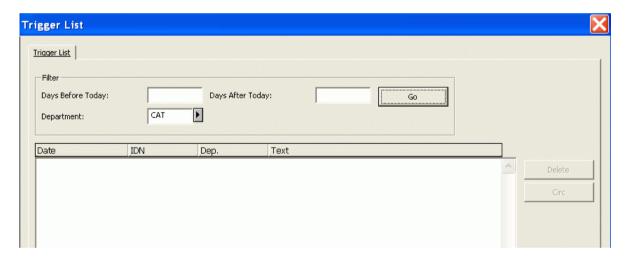
You can also change column width by dragging the boundary on the left or right side of the column heading until the column is the width you want.

# 3 Triggers

Triggers are a way to link a reminder to a record. The reminder can be an instruction to perform a task related to a record, or general information. Triggers can be retrieved and viewed across modules. A single trigger can be directed to a specific grouping "department". This means that the acquisitions librarian can input a trigger that is intended for the cataloger, and so on.

The following explanations deal with the General Triggers List (a list of triggers from which you can directly access the relevant record), and with Record Triggers (the triggers relevant to a displayed record).

# 3.1 General trigger list

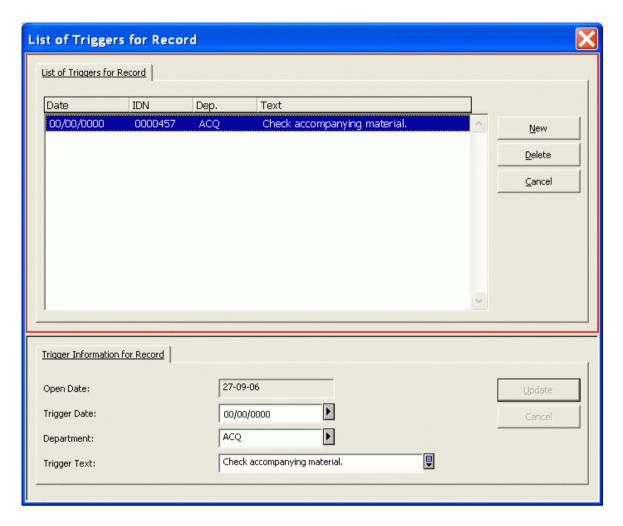


The triggers can be filtered by action date and grouping.

The way in which this triggers list is retrieved varies from module to module:

- Acquisitions & Serials -> Administration tab -> Triggers node; the trigger can be used to access the relevant Order or Serial record.
- Circulation -> Alephino menu -> Retrieve Triggers option; the trigger can be used to access the relevant Item record.
- Cataloging -> Records tab -> Triggers node; the trigger can be used to access the relevant Title or Item record.

# 3.2 Record trigger list



The way to call up triggers relevant to a specific Record Trigger also varies from module to module:

- Acquisitions / Serials -> Order tab -> Trigger List node
- Acquisitions / Serials -> Serial tab -> Trigger List node
- Circulation -> Item tab -> Trigger List node
- Cataloging -> Edit menu -> Record's Triggers
- Cataloging -> Items tab -> Trigger List node

A new trigger can be added or a specific trigger can be updated.

# 4 Web Services, Task Manager and Print History

### 4.1 Web Services

The Alephino Web Services are available from a module called the 'Web Service Module'. This module contains useful services for different purposes:

- Administration and maintenance of the system;
- Running reports and statistics on Items data, Circulation and Acquisitions data;
- Managing SDI profiles;
- Customizing the system;
- Exporting and importing records.

The following picture shows the main Menu of the Alephino Web Service module. From this menu, you can select the appropriate topic by clicking on it.



#### Web Services

Administration Database and Server Maintenance

Circulation/Items Reports and Services
Acquisitions Reports and Services

Serials management Subscription/Routing lists, Claims

Statistics Reports for Holdings, Circulation and Acquisition

Batch services Common batch services
Profile services SDI Search profiles for users

Setup Services Adjust server side parameter tables

Interfaces Unload / load data

Z39.50 Gateway Z39.50-Gateway Maintenance

Manual Alephino user manual

Start Server



The first entry is called 'Administration'. Important services for administration and maintenance of the database are covered here, for example database backup procedures.

The next entries 'Circulation/Items', 'Acquisitions', and 'Serials management' cover a lot of services that can be used to create reports, as well as services for ordering and claiming material.

If you select 'Statistics' from the main menu, you find services that enables you to create holdings, circulation or acquisition statistics.

Services that are related to the setup of the system can be entered by clicking on 'Setup Services'. Here you can manage staff users and their privileges, or customize circulation parameters according to the rules of your library.

Services for managing SDI profiles can be entered by clicking on the entry 'Profile services SDI'.

If you need to export or import records, you select the entry 'Interfaces' from the main menu.

A user manual can be opened from this main menu. This manual contains descriptions to any part of the system.

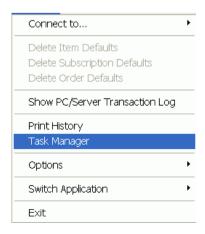
The URL to open the Web service module depends on your installation. Please ask you system administrator. Usually the URL is build as follows: http://Server IP address:8030/aliadm

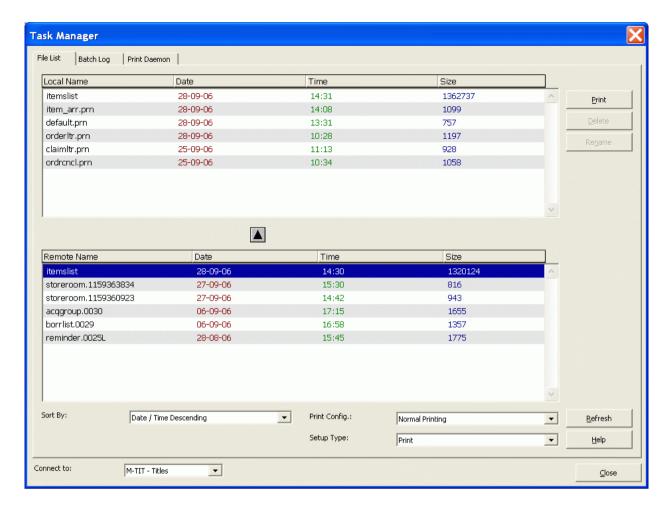
Please refer to the training session for Web Services to find more information.

#### 4.2 Task manager

The 'Task Manager' function is present in each of the Alephino modules, accessed from the menu bar. It enables you to work with print files that have been produced by various functions, view the batch logs, and set up and activate printers.

The Task Manager can be activated by selecting "Task Manager" from the Alephino menu:





The Task Manager window has three tabs, for the three Task Manager functions:

- File List view and/or print files.
- View the Log of a batch procedure.
- Set up and activate or deactivate the Print Daemon.

#### **4.2.1** File list

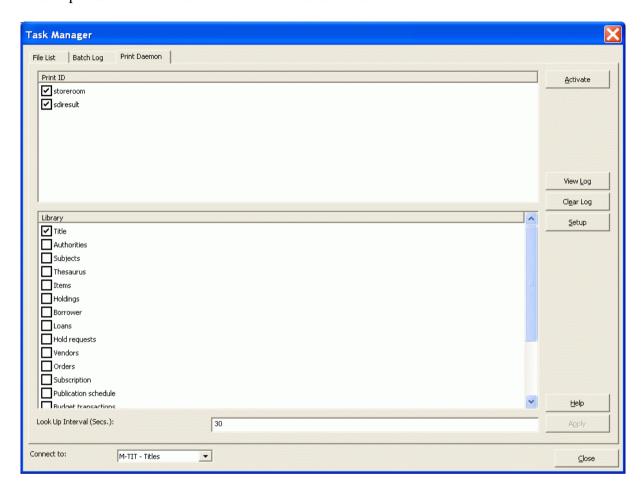
The List of files Tab is divided in two panes: Local files (upper) and Remote files (lower). You can copy files from the server to the local directory and then view, edit and print the local files. To do this, select the line in the lower pane and double-click, or click the arrow button in the center of the window.

#### 4.2.2 Batch Log

The Batch Log lists the batch processes which have run or are currently running. The upper half of the Batch Log shows the name of the procedure, the PID (that is, the process ID, a unique ID assigned by the system). For each entry highlighted in the upper half of the window, the lower half shows information such as start and end times and log file text. You can set up a Print Daemon to periodically look for files of a particular library that have a particular Print ID and print them on the PC's default printer.

#### 4.2.3 Print Daemon

The purpose of the Print Daemon is to transfer print files from the server to the workstation for printing. When the daemon is activated on the PC, it periodically looks for files in the print directory of a particular library that have a specific Print ID and prints them on the PC's default printer. It is also valid for storeroom and sdiresult.



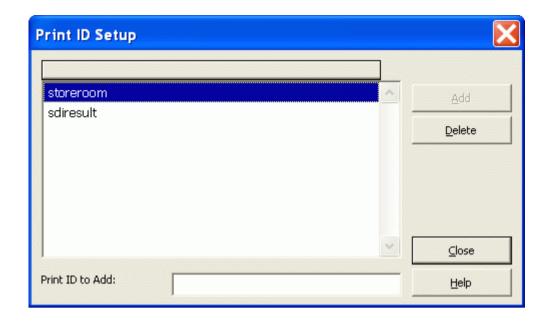
The Print Daemon tab contains the tools for setup and activation of the Print Daemon.

### 4.2.3.1 Print Daemon Setup

To set up and activate the Print Daemon, follow these steps:

- 1. Define the PC workstation's default printer, using the standard Windows procedure for this task.
- 2. Add the Print IDs that you want to be recognized by the workstation. (for example if you wish to print the storerooms in the store print).

To do this, click the **Setup** button. The following dialog box is displayed:



- To add a print ID, place the cursor in the field at the bottom of the window labeled "Name of print ID to add" and enter a Print ID. Then click Add. If you do not want to make any additional changes to the list, click Close.
- o To remove a Print ID from the list, highlight the Print ID and click **Delete**. If you do not want to make any additional changes to the list, click **Close**.

The Print-IDs are saved in the file ../Alephcom/Tab/Alephcom.ini in [General]:

```
[General]
Targets=storeroom, sdiresult
```

- 3. If you use the SDI service, (Web Service Module / SDI Service) the "sdiresult" Checkbox must be highlighted. If you work with <u>Closed Stack Management</u>, the "storeroom" Checkbox must be highlighted. The "Title" checkbox must always be highlighted. After you have made all desired changes, click **Apply**.
- 4. Activate the Print Daemon by clicking the **Activate** button on the Print Daemon tab. When the Print Daemon is active, the system will look periodically for files of a particular library that have a particular Print ID and will print them on the PC's default printer.

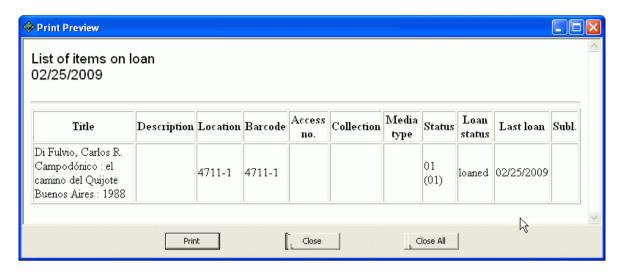
Following is an explanation of other options on the Print Daemon tab of the Task Manager window:

#### **Lookup Interval**

The Lookup Interval tells the system how often it should look for files that need to be printed by the Print Daemon. Enter a number between 001 and 300 (seconds). For example, if you enter 030, the system will check for files every 030 seconds. Values under 100 need leading zeroes (030 for a 30 second interval).

### View Log

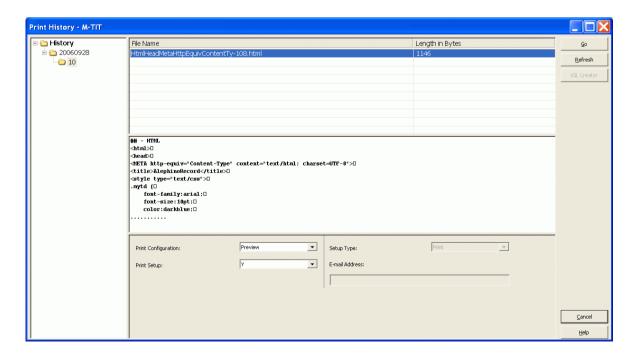
Click **View Log** to read the log of print jobs that have been processed by the Print Daemon or errors that have occurred. For example:



**Clear Log**Click **Clear Log** to clear the log display.

# 4.3 Print History

All files that are printed in an Alephino GUI module interface are saved in a "history" section (register "history", ex: ..\ACQ\files\B-TIT\print\history). The Print History function is used to view and/or reprint all files that were printed from the GUI. Any printout that is generated online from a GUI window or service appears in the respective module's Print History. For example, if a Hold Request Not Filled letter was printed, it will appear in the Circulation module's Print History.



The left pane is a navigation tree that lists all the dates and rounded hours when files were printed. Each day is a separate node, and each rounded hour is a separate sub-node. Highlight the relevant node to list the names of all the files that were produced in that time period.

The upper right pane lists each of these files and their size. Highlight a file on this list to see the beginning of its contents in HTML format on the lower right pane.

#### **Print Configuration**

Select one of the following options and then click the Go button:

- Normal Printing: Print the file as it was originally printed.
- Preview: Preview the printout. You can then click Print to print the file.
- View Raw in an editor: View the file in raw HTML format in an editor window. This mode can be used for debugging.

#### **Print Setup**

Select Y to have the Print Setup window appear before printing. Otherwise select N.

#### **Setup Type**

This field is only enabled when Normal Printing is selected in the Print Configuration field. Select "Print", "E-mail" or "Both".

#### E-mail Address

Enter the e-mail address here if you are sending the file by e-mail. If the print file includes an e-mail address, it will be displayed here.

#### **Buttons**

#### Go

Click the Go button to activate reprinting from the Print History.

#### Refresh

Click the Refresh button to clear the bottom pane.

### 5 Version Check

The **Version Check** is a tool which is used to distribute client files from a central server to the workstations. You can manage executable and text file with the Version Check. To run the Version Check, open the..\Alephcom\Bin\version.exe file manually or select the function from the Windows-Startmenu / Programm / Alephino 41 / Versions-Check.

The Version Check compares the files on the local drive with the file on the server. If the files on the local drive are older than the files on the server, these files will be displayed:



Click **All** to update all listed files. To update some files, highlight these files and click **Partial**. The files will be transferred (binary) from the server to the local drive, and will replace the old version.

The Version Check function can be used to distribute Client Settings or to level Client programm revisions in all workstations by following these steps:

- 1. Execute Client changes
- 2. Copy the updated file with the complete directory tree in the \version directory (Server-Installation). For example you can create a subdirectory \Alephcom\Tab in the \version directory and add the Alephcom.ini file.

  Updated Client programm, which are available as Patch, will be delivered with the relevant directory tree.
- 3. From Start Programm Alephino\_41 Version-check (or a double click on Alephcom\Bin\Version.exe) activate the function and perform whether complete or partial.

# 6 Help

# 6.1 Client Online help

To access help in an ALEPHINO GUI, do one of the following:

• Press F1 from a highlighted menu entry:



- Click the Help button.
- Press F1 from the pane in focus.
- Click the question mark 2 and then on a screen element.

#### **6.2** Online manual

A user manual can be opened from the Web Services main menu. This manual contains explanations to any part of the system.





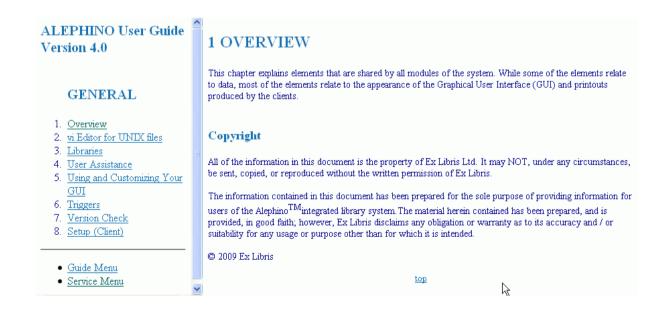


The User Guide's table of contents appears in the left-hand frame:



In order to read the guide sequentially, start with the General chapter, Overview section and select *Go to next section* at the end of each section. Note that at the bottom of the left frame, you can select *Guide Menu* to return to the Guide's main table of contents, or *Staff Menu* to return to the Alephino Staff menu.

The right frame displays the Overview section of the module's chapter. The left frame displays the chapters in the selected module:



In order to read a specific section, click the section's link in the left frame. Each module of the system has its unique chapter in the Web Guide. Most sections of the chapters are written for the library staff working with Alephino. These sections explain how to use Alephino, some contain workflow diagrams showing an overview over specific processes. Some chapters additionally have a sub-section which explains how to set up the module. Among other things, the Setup sections include help for various default settings (for example, in the INI file), tables and printouts.

The General and Task Manager chapters provide important general information that is useful for all modules.