ALEPH Version 19 Information Session

What to review

What is new for ILL
What to Review

• Enter a request as a patron
  go to www.dev19.mnpals.net

Search for a title and create a book or journal request
Go into the GUI and look at the ILL request

Did the ILL request get entered?

How does it look?
Review Letters to Patrons

Borrowing request
click on Print and look at your Letters
Lending slip Print

• Look at lending slip Print for returnable and non-returnable
Review a request

• Look at a borrowing request in version 18 and compare it to the same borrowing request in version 19

• Look at a lending request in version 18 and compare it to the same lending request in version 19
New features

• Change you won’t really notice- there is only Interlibrary Loan-no ILL and ILL2 (Integrated ILL)

• Receive- added delivery option for Arrival letter for non-returnable (copies)

• Archiving of completed Borrowing and Lending requests

• Location of Task Manager

• Location of MnPALS ILL reports

• Change status - Sent to Supplier to Shipped
Added Copy Arrival letter

- Separated the delivery format for the Receive-Arrival letter copies and returnables. Same letter is used.
- In ALEPHADM/Configuration/Print Configuration/Interlibrary Loan added Copy Arrival Letter
- For example, staff can setup their client so when a returnable is received the Arrival letter is emailed and when a copy request is received the Arrival letter is printed.
- This is a pc by pc (workstation by workstation) setup
In ver. 18 you had an Interlibrary loan and Interlibrary loan 2.

Added CopyArrival Letter

The Mail column/delivery format can be different for copies and returnables.
Copy Arrival Letter not printed or emailed - Set Target 1 column to NO-PRINT
New feature- Archiving of ILL requests
Archiving of Borrowing requests

- The category number count of the category the archive service ran on will go down by the number of requests archived.
- The archived requests will not display in the category.
Archive Unfilled Borrowing request category
Count changes
Before archive

The first three requests were archived based on date - they do not display.
After running Archiving for borrowing requests

• Find an archived request by the Request Number search
• Find an archived request by using “Words from Title (history)”

• You can NOT search archived requests by patron barcode, ISBN or ISSN
• Archived requests are not grouped in their previous category
Search for an Archived request by Request number

Archived request only Print
Borrowing Search - new search for Words from Title (history)
Archive Service- adds entry into the Request log
Archiving of ILL borrowing requests
Generate Borrowing History (ill-88)
Do NOT run Archiving on All of your borrowing requests

- Enter Output file name
- Borrowing Req Status- think before using ALL
- Status Date Before- requests in the selected category with this update date (inclusive)
Archiving produces a report

<table>
<thead>
<tr>
<th>Title</th>
<th>Request Num</th>
<th>Status</th>
<th>Open Date</th>
<th>Update Date</th>
<th>Last Interest Date</th>
<th>Request Media</th>
<th>Copyright Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy</td>
<td>330</td>
<td>Cancelled</td>
<td>03/09/2005</td>
<td>01/22/2009</td>
<td>03/30/2006</td>
<td>Film, Video</td>
<td>00-Free of fee</td>
</tr>
<tr>
<td>Corporate finance demystified /</td>
<td>341</td>
<td>Cancelled</td>
<td>03/14/2005</td>
<td>01/22/2009</td>
<td>06/24/2006</td>
<td>Printed (loan)</td>
<td>00-Free of fee</td>
</tr>
<tr>
<td>testing</td>
<td>375</td>
<td>Cancelled</td>
<td>03/22/2005</td>
<td>01/22/2009</td>
<td>04/17/2006</td>
<td>Printed (loan)</td>
<td>00-Free of fee</td>
</tr>
<tr>
<td>Bear Child's book of hours -</td>
<td>496</td>
<td>Cancelled</td>
<td>04/26/2005</td>
<td>01/22/2009</td>
<td>05/29/2006</td>
<td>Printed (loan)</td>
<td>00-Free of fee</td>
</tr>
<tr>
<td>MCSD Visual Basic 5 distributed applications study guide (exam 70-175)</td>
<td>992</td>
<td>Cancelled</td>
<td>07/19/2005</td>
<td>01/22/2009</td>
<td>07/08/2006</td>
<td>Printed (loan)</td>
<td>00-Free of fee</td>
</tr>
<tr>
<td>Digital nation: toward an inclusive information society /</td>
<td>1130</td>
<td>Cancelled</td>
<td>08/03/2005</td>
<td>01/22/2009</td>
<td>08/31/2006</td>
<td>Printed (loan)</td>
<td>00-Free of fee</td>
</tr>
<tr>
<td>Anthony G. Wilhelm.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>testing</td>
<td>1150</td>
<td>Cancelled</td>
<td>08/07/2005</td>
<td>01/22/2009</td>
<td>09/21/2006</td>
<td>Printed (loan)</td>
<td>00-Free of fee</td>
</tr>
<tr>
<td>Buick, Oldsmobile &amp; Pontiac FWD models automotive repair manual /</td>
<td>1579</td>
<td>Cancelled</td>
<td>09/06/2005</td>
<td>01/22/2009</td>
<td>09/20/2006</td>
<td>Printed (loan)</td>
<td>00-Free of fee</td>
</tr>
<tr>
<td>Mike Stubbsfield and John H. H.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Franchising World</td>
<td>2451</td>
<td>Cancelled</td>
<td>10/04/2005</td>
<td>01/22/2009</td>
<td>04/02/2007</td>
<td>Photocopy (copy)</td>
<td>00-Free of fee</td>
</tr>
<tr>
<td>America's top 100 jobs for people without a four-year degree -</td>
<td>4103</td>
<td>Cancelled</td>
<td>11/21/2005</td>
<td>01/22/2009</td>
<td>11/30/2006</td>
<td>Printed (loan)</td>
<td>00-Free of fee</td>
</tr>
<tr>
<td>great jobs with a promising future /</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total Borrow Records Archived: 11
Borrowing Archive Service can be run on

- Cancelled
- Closed
- Deleted
- Expired
- Unfilled
- There is an option to archive All of these categories- think before doing this
- A report of archived requests is produced
Caution- Archive borrowing requests

• Since we have not been able to archive requests some of the request categories are very large. You will want to incrementally work on these categories.

• Removal of patron information from a request

• Copyright after a request is archived you can not modify copyright designation

• Overdue/bill on loan of an ILL request

• Think about how you use a category
Archiving-Borrowing Library Statistic Report (ill-63)

According to the documentation, archived requests should be part of the borrowing statistics.

In my testing, the archived requests were part of the statistical report when appropriate.
Remove Patron IDs (circ-32)

This is a service in circulation that removes patron data from closed ILL requests.

I have not tested this patron scrubbing service with borrowing archiving.
Archiving of ILL lending requests - Generate Lending History (ill-89)
Archiving of lending requests

- The category number count of the category the archive service ran on will go down by the number of requests archived.
- The archived requests will not display in the category.
After running the lending Archive service (ill89) on expired category-the count in the category changes
Before archive

The first three requests were archived and do not display
After archiving lending requests

• Find an archived request by the Request Number search
• Find an archived request by using “Words from Title (history)”
• You can NOT search archived requests by Requester institution symbol, ISBN or ISSN
• Archived requests are not grouped in their previous category
Search for archived lending request by ILL request number

Archived lending request only Print functionality
Lending Search-now search for Words from Title (history)
Archive service on lending category adds Archive entry in Request log
Archiving of ILL lending requests
Generate Lending History (ill-89)
Do NOT run lending archiving on All of your requests

• Enter Output file name
• Borrowing Req Status- think before using ALL
• Status Date Before- requests in the selected category with this update date (inclusive)
Archived lending report
Lending Archive service can run on these categories

- Closed
- Cancelled by Requester (borrowing library or patron)
- Deleted
- Expired
- Answer Unfilled
- All- there is an option to archive all think before doing this
- A report is produced of archived lending requests
Caution-Archive lending requests

• Think about the amount of archiving you are doing at one time-impact on other services

• If you have a large number of requests in the Closed, Cancelled by Requester, Expired or Answer Unfilled categories you may need to choose a category and run the archive service a number of times with different “Status before date”

• “Status before Date” requests with this date will be archived.
Archiving-Lending Library Statistic Report (ill-64)

According to the documentation, archived requests should be part of the lending statistics.

In my testing, the archived requests were part of the statistical report when appropriate.
System librarian information-To run archiving you must update Staff Privilege/logon to allow the staff person to run this service.

For staff that you want to run Generate Borrowing History (ill88) or Generate Lending History (ill89) need to Allow this on their Staff privilege.
Task Manager-new location

Task Manager can be accessed from each module

Task Manager is where you will retrieve reports and lending pick slips.

There is additional functionality on the Batch Log.
MnPALS Reports and Version 19

• Version 19 has a limit on privileges and custom reports. Because of this there has been consolidation of reports.
• Custom reports have been grouped on what fields are pulled from.
  – For example Item reports are grouped together.
• Also the custom report number has changed
MnPALS ILL Reports

• ILL Loans without item records
  • In version 18 was mnpals-21
  • In version 19 is priv-12

• Check for Empty ILL library
  • In version 18 was mnpals-20
  • In version 19 is priv-05

• Both of these reports have moved to the Circulation module
ILL Loans without Item Records

In Circulation
Under Services
Select Custom Services
Item Reports (priv-12)
To run ILL Loans without Item Records- click on radio button “ILL Loans with Item Record”

Enter an Output File name

Click on ILL Loans without ILL Records button
Check for “Empty ILL”
Check for Empty ILL library

Enter an Output File name
Add Change Status

• ILL units that use EXTI symbol have used Bulk Operation Receive when the OCLC library supplies the item.

• The most recent service pack changes the function of the Bulk Operation Receive so a lending request must be Shipped.
Change status- Sent to Supplier to Shipped

• For borrowing requests with the status of Sent to Supplier added change status to Shipped. This will allow libraries that send requests to EXTI to change the status to Shipped when they get an item from OCLC.

• Once the item status has been changed to Shipped then a request can be Received.

• A copy request must have a Requested Media of Photocopy (copy).
Borrowing requests from other ILL units

• If you get an item from another ILL unit that has not been Shipped.

• As a courtesy to the other library send a message that the request status is not Shipped.

• The lending library wants to have their requests Shipped so they can track their materials.
Change Status from Sent to Supplier to Shipped.
When Receiving a request from EXTI make sure to enter in the due date from OCLC library in Expected Return Date.

The Change Status to Shipped activates the Receive functionality.
For EXTI Copy requests that you have Changed status to Shipped.

Copy requests must have a Requested Media of Photocopy (copy) to Receive the request.

1. Click on Request Details
2. Change Requested Media to Photocopy (copy)
3. Click Update
More information

• On our website
  http://www.mnpals.org/sections/Aleph_Docs.html

• Then under Documentation look for Interlibrary Loan- then ALEPH Version 19.01 Staff User’s Guide-Integrated ILL

• ALEPH 19 Release Notes
Aleph Secure Documents

You must be associated with a PALS member library to access these documents. For the appropriate user name and password, contact your Systems Librarian or the PALS office.

Aleph Documentation

- **Acquisitions and Serials** January 2009
- **Booking** June 2008
- **Cataloging** January 2009
- **Circulation** January 2009
- **Course Reserves** January 2009
- **GUI** August 2006
- **Inventory** October 2008
- **Interlibrary Loan** January 2009
- **Systems** January 2009
- **Tables** December 2007
- **Web OPAC** January 2009
- **Aleph Vocabulary** April 2004
- **List of Aleph Services and Reports** Updated Regularly—Excel Spreadsheet

Aleph 19 Release Notes

- **Aleph 19 Release Notes**
- Specific user guides and other related Aleph 19 documents can be found in the categories above.