MnSCU/PALS to ALEPH

Services, Notices, and Reports

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Section 7a

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What are Services?

Services are processes run in the system that may manipulate the database in a certain way (e.g. build indexes), produce reports of data (e.g. circulation statistics or budget reports), or produce correspondence (e.g. order lists or overdue notices).

Services are module specific and each module has a different list of services available in its Main Menu. The Service menu is sensitive to the library to which you are connected.

This document will explain how to submit a service and it will also provide a list of what services are available in each module. For more detail on a specific service, refer to the “Service in <Module name>” document located in each respective notebook. For more information on reviewing output after running a service, refer to the “Task Manager Overview” document.

[System Librarian: Services are located in the ./alephe/pc_b_eng/ directory, which can be reached using the shortcut: pcb.

Each service has two files: an XML file for the batch and GUI interface, and an HTML file for the Help section. The file names start with p-. For example, Budget Summary consists of p-acq-16.xml and p-acq-16.html

Each module’s selection menu is built from menu files in the ./alephe/pc_b_eng/ directory. These files have the convention menu-<module abbrev>.xml For example, the Acquisitions menu file is menu-acq.xml.]

Submitting a Service

Manually

Before running a service, you need to make sure that the module from which you are running the service is connected to the database/library that you want to run that service in.

Choose a library by clicking the icon (in the lower right corner of the module) or select File/Connect to... A list of libraries will display for you to choose from.
Once in the relevant library, you can select a process from the **Services** menu, for example:

<table>
<thead>
<tr>
<th>Services</th>
<th>Window</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>History</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Retrieval Form (ret-adm-01)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update Item Records (manage-62)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Report of missing items (ret-item-02)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Items Labels (item-03)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shelf Reading Report (item-04)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shelf List (item-05)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rebuild Call Number Index (item-06)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Issues Arrival Statistics by Collection - Dates (util-s-05-04)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Trigger Report (com-01)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*In Circulation 2, this **Services** menu is located within the **Aleph** menu.*

This will open the form for the process. Here is the form for the **Missing Items Report**:
Since each form is different, there is help provided to assist you in completing it. Click on **Help** to go to the Help page for that form. The Help page will specify more details about what information goes in which fields and whether or not a field is mandatory.

Some common fields you will see in most of the forms are:

**Output File**
Enter your name for this job. You are limited to 20 alphanumeric characters including hyphen (-) and underscore (_) with no spaces.

**Input File**
Enter output file name from a job that you have already run. The system will use that file as the basis (input) for a new output file.
Enter the Run Time for the job. The system uses a 24 hour (‘military’) clock, so if you want the job to run at 11pm, enter “23.” If you want to run the job immediately, set the time to any time before now (or “00”).

Print ID
Optional. The Print ID must be entered in lowercase with no blanks. It will be suffixed to the output filename; for example a courtesy notices process with a print ID might read “courtesy_notices.printer01.” If the Print Daemon is set up in the GUI Task Manager, it will recognize the suffix and print the file automatically. Otherwise, you can print on-demand by using the GUI Task Manager to select the file.

Checking this box will add this service to the Services History for this machine. If checked when run, the service parameters will be saved for review.

Click “View History” to display the list of services that you have previously submitted. Highlight a line and click “Open” to display the job and parameters. You can change the parameters and submit.

After you have completed the form, click on the “Submit” button. This sends your report to the Task Manager’s Batch Queue. If there is an error in the form, the system will notify you with a text bubble before sending the job, prompting you to correct the mistake:

Otherwise, if the system does not detect any errors, the following confirmation message displays:
Automatically

For reports and processes that need to be run regularly, the System Librarian can set up a job list and job daemon to do this automatically.

Services History

The Services History List displays a list of services that were previously submitted. Only services whose Add to History field is checked will be included in the Services History List.

To access the Services History List, select Services/History from the Main Menu and the Services History List displays:

Highlight a line and click the “Open” button to display the job and parameters. You can change the parameters and submit the service again.

To delete a particular service from the list, highlight the desired entry and click the “Delete” button.
List of Services by Module

Below is a list of Services organized by the module from which you access that service. For more detail on a specific service, refer to the “Service in <Module name>” document located in each respective notebook.

Acquisitions

Orders and Claims
Order Log Report (acq-22)
Claim Report and Letters for Monograph Orders (acq-12)
Claim Report for Standing Orders (acq-11)
Claim Report for Serials Orders (acq-19)
Send List of Orders to a Vendor (acq-14)

Retrieve and Print Acquisitions Records
Partially-Filled Monograph Orders (acq-02-02)
Monograph Orders – Status “New” (acq-02-03)
No Invoice (acq-02-04)
Order Status (acq-02-05)
Order Cancelled by Vendor (acq-02-06)
General Retrieval Form (acq-02-01)
Print Acquisitions Records (acq-03)

Budget Management
Open Annual Budget (acq-05)
Renew Order Encumbrance for Monograph (acq-06-a)
Renew Order Encumbrance for Serials and Standing Orders (acq-06-b)
Transfer Remaining Balance (acq-07)
Update Local Price of Budget Transaction (acq-08)
Deactivate Encumbrance (acq-09)
Budget Summary (acq-16)
List of Orders per Budget (acq-04)

Currency
Currency Report (acq-01)
Upload Currency Ratios (acq-20)

EDI
Send EDI Orders to a Vendor (acq-13)
Load EDI Incoming Messages (edi-09)
Processing EDI Incoming Messages (edi-10)
Other
Invoice Report (acq-10)
Rebuild ILL and Acquisitions Order Index (acq-04)
Subscription Renewal Letters (acq-23)
Banner/FRS Export (acq-21)
Vendor Address Data Update Report (acq-60)
General ADM and Orders Creation (acq-24)

Statistics
Statistics by Dates – Material/Month (acq-25)

General
Print Trigger Report (com-1)
Build Search Words for a Record (manage-111)
Create Filing Keys for Name (manage-64)

Administration
Print Trigger Report (com-01)
Build Word Indexes for a Record (manage-111)
Selective Dissemination of Information – SDI (sdi-01)

Cataloging (BIB records)
*Connected to a BIB library

Retrieve Catalog Records
Retrieve Catalog Records (ret-01)
Retrieve Records Using CCL (ret-03)
Retrieve Catalog Records by Date (ret-04)
Cross Files (ret-10)
Print Catalog Records – Custom Format (print-01)
Print Catalog Records – Columnar Format (print-08)
Print Catalog (print-04)
Print Catalog Records with “Non-preferred” Headings (print-05)
Print Bibliography (print-10)
Download Machine-readable Records (print-03)

Load Catalog Records
Convert MARC Records – Step 1 (file-01)
Convert MARC Records – Step 2 (file-02)
Convert ALEPH Sequential to MARC Communication Format (file-12)
Modify MARC Record File (file-08)
Convert SWETS Records (file-05)
Fix and Check Catalog Records (manage-25)
Character Conversion (manage-22)
Load Catalog Records (manage-18)
Load Catalog Records – Parallel Load (manage-18-p)
Check Input file Against Database (manage-36)
Load YBP Records (file-96)
Load MARCIVE Records (file-99)
Load BNA Records (file-98)
Create Holdings and Item Records Using Bibliographic Data (manage-50)

Build Indexes to the Catalog
Update Word Index (manage-01)
Update Direct Index (manage-05)
Update Headings Index (manage-02)
Update Sort Index (manager-27)
Alphabetize Headings - Setup (manage -16)
Alphabetize Long Headings (manage -17)
Update Short Bibliographic Records (manage-07)
Update Index for Selected Records (manage-40)
Build Counter for Logical Bases (manage-32)
Update Brief Records (manage-35)
Create Links between Records (manage-12)

Catalog Maintenance Reports
Delete Unlinked Headings (manage-15)
List Unauthorized Headings (auth-03)
Detect Similar Headings (manage-26)
List Headings Having Multiple Document Records (auth-04)

Catalog Maintenance Procedures
Fix and Check Catalog Records (manage-25)
Delete Unlinked Headings (manage-15)
Alphabetize Long Headings (manage-17)
Global Changes (manage-21)
Delete “CAT” Fields (manage-13)
Create/Update Z106 Table for “CAT” Field (manage-19)
Delete Bibliographic Records Including Related ADM/HOL Records (manage-33)

General
Print Trigger Report (com-01)
Count of New and Updated Cataloging Records – by Cataloger (stat-23)
Cataloging (ADM Records)
*Connected to an ADM Library

Retrieve Catalog Records
Retrieve Administrative Records (ret-01)
Print Administrative Records – Columnar Format (print-08)
Down-load Machine-readable Records (print-03)

Load Catalog Records
Load Administrative Records (manage-18)
Load Catalog Records – Parallel Load (manage-18-p)

Build Indexes to the Catalog
Update Word Index (manage-01)
Update Direct Index (manage-05)
Update Headings Index (manage-02)
Update Sort Index (manage-27)
Alphabetize Headings - Setup (manage -16)
Alphabetize Long Headings (manage -17)
Update Short Bibliographic Records (manage-07)
Update Index for Selected Records (manage-40)
Create Links between Records (manage-12)

Catalog Maintenance Procedures
Delete Unlinked Headings (manage-15)
Alphabetize Long Headings (manage-17)
Global Changes (manage-21)
Delete “CAT” Fields (manage-13)
Create/Update Z106 Table for “CAT” Field (manage-19)

General
Print Trigger Report (com-01)

Cataloging (HOL Records)
*Connected to a HOL library

Retrieve Catalog Records
Retrieve Catalog Records (ret-01)
Retrieve Catalog Records by Date (ret-04)
Print Catalog Records – Custom Format (print-01)
Print Catalog Records – Columnar Format (print-08)
Down-load Machine-readable Records (print-03)
Load Catalog Records
- Convert MARC Records – Step 1 (file-01)
- Convert MARC Records – Step 2 (file-02)
- Convert ALEPH Sequential to MARC Communication Format (file-12)
- Modify MARC Record File (file-08)
- Fix and Check Catalog Records (manage-25)
- Character Conversion (manage-22)
- Load Catalog Records (manage-18)
- Load Catalog Records – Parallel Load (manage-18-p)
- Export BIB Records with Holdings Information (export-01)

Build Indexes to the Catalog
- Update Word Index (manage-01)
- Update Direct Index (manage-05)
- Update Headings Index (manage-02)
- Update Sort Index (manager-27)
- Alphabetize Headings - Setup (manage -16)
- Alphabetize Long Headings (manage -17)
- Update Short Bibliographic Records (manage-07)
- Update Index for Selected Records (manage-40)
- Create Links between Records (manage-12)

Catalog Maintenance Reports
- Delete Unlinked Headings (manage-15)

Catalog Maintenance Procedures
- Fix and Check Catalog Records (manage-25)
- Delete Unlinked Headings (manage-15)
- Alphabetize Long Headings (manage-17)
- Global Changes (manage-21)
- Delete “CAT” Fields (manage-13)
- Create/Update Z106 Table for “CAT” Field (manage-19)

General
- Print Trigger Report (com-01)

Circulation

Notices to Patrons
-Courtesy Notices (cir-10)
Overdue and Lost Billing
Overdue and Lost Billing Notices (cir-50)
Overdue and Lost Billing Summaries (cir-51)
Print Overdue Summary Single Letter (cir-52)

Renew/Recall Loans
Renew Loans (cir-08)
Recall Loans (cir-13)

Requests
Call Slips for Hold Requests (cir-12)
Photocopy Request Slips (cir-22)
Campus Hold Requests Router (cir-24)

Reports
Borrower List (cir-05)
Hold Requests Report (cir-07)
Outstanding Hold Requests Report (cir-11)
Hold Shelf Report (cir-06)
Loan Report (cir-04)
Report of Items in High Demand (cir-14)
Report of Items in Reading Room (cir-15)
Report of Returned "Lost" and "Claimed Returned" Items (cir-16)
Report / Delete Expired Hold Requests (cir-17)
Delete Patron Records (cir-23)

Advance Booking
Open Advance Booking Schedules (cir-60)
Delete Advance Booking Schedules (cir-61)
Advance Booking Schedule Report (cir-09)
Delete Advance Booking Slots (cir-65)

Remote Storage
Remote Storage Import (cir-03)
Remote Storage Export (cir-18)

Cash Transactions
Cash Transaction Report (cash-02)
Payments Received Report (cash-03)
Delete Paid Transactions (cash-04)
Unpaid Transactions Letter / Update Transactions to "Paid" (cash-05)
Notices to Patrons with Outstanding Fines (cash-06)
Cash Export Process (export-09)

Statistics
Sublibrary / Borrower Statistics (stat-07)
Sublibrary / Date (stat-08)
Sublibrary / Item Statistics (stat-09)
Sublibrary / Material Statistics (stat-10)
Claim Return - Item Statistics (stat-11)
Claim Return - Patron Statistics (stat-12)
Loan - Sublibrary / Item Statistics / Borrower Statistics (stat-13)
Return - Sublibrary / Item Statistics / Borrower Statistics (stat-14)
Renew - Sublibrary / Item Statistics / Borrower Statistics (stat-15)
Hold Requests - Sublibrary / Item Statistics / Borrower Statistics (stat-16)
Photocopy Requests - Sublibrary / Item Statistics / Borrower Statistics (stat-17)
Hold Requests: Exact Copy - Sublibrary / Item Statistics / Borrower Statistics (stat-18)
Claimed Returned Items Sorted by Item Barcode (stat-25)
Claimed Returned Items Sorted by Patron Barcode (stat-26)

General
Print Trigger Report (com-01)
Build Search Words (manage-111)
Create Filing Keys for Names (manage-64)
Patron Loader (file-20)

Course Reading/Course Reserves
(*These Services are submitted from the web-based Course Reading/Reserves module)
Print Pickup List (course-02)
Reindex Course Reading Database (reindex-data)
Remove Course List Report (course-03)
Report of Unlinked Course Reading Records (course-04)
Items Report (course-05)
Course Documents List (course-01)

ILL

Outgoing ILL
Print Report of New Requests (ill-01)
Claim Report and Letters (ill-02)
ILL Request Report (ill-07)
Static Status Requests Report (ill-08)
Outstanding Requests of Former Borrowers (ill-09)
Send a List of Requests to an ILL Supplier (ill-10)

Incoming ILL
New Incoming ILL Requests Report (ill-50)

General
Print Trigger Report (com-01)
Rebuild ILL and Acquisitions Order Index (acq-04)

Items
General Retrieval Form (ret-adm-01)
Update Item Records (manage-62)
Print Item Labels (item-03)
Shelf Reading Report (item-04)
Shelf List (item-05)
Rebuilding Call Number Index (item-06)
Issues Arrival Statistics by Collection – Dates (util-s-05-04)
Print Trigger Report (com-01)

Serials

Claims
Print Claim Report (serial-04)
Print Claim Letters (serial-44)

Routing
Report of Routing Lists (serial-07)
Letters to Routing List Members (serial-08)

Check-in
List of Serial Titles and Number of Arrived Issues (serial-16)
Print Arrived Issues Report (serial-06)
Open Expected Issues (serial-11)
Open Expected Issues and Publication Schedules (serial-13)

Publication Schedule
Open Publication Schedules (serial-10)
Delete Publication Schedules (serial-20)
Export 85x Records (serial-51)
Import 85x Records (serial-52)

**Staff Search**

**General**
Print Trigger Report (com-01):

**Retrieve Catalog Records**
Retrieve Catalog Records (ret-01)
Retrieve Records Using CCL (ret-03)
Retrieve Catalog Records by Date (ret-04)
Sort Catalog Records (ret-21)
Cross Files (ret-10)
Print Catalog Records - Custom Format (print-01)
Print Catalog Records - Columnar Format (print-08)
Print Catalog (print-04)
Print Catalog Records with “Non-preferred” Headings (print-05)
Print Bibliography (print-09)
Print Index for Bibliography (print-10)
Download Machine-readable Records (print-03)

**Build Indexes to the Catalog**
Update Word Index (manage-01)
Update Direct Index (manage-05)
Update Headings Index (manage-02)
Update Sort Index (manager-27)
Alphabetize Headings - Setup (manage -16)
Alphabetize Long Headings (manage -17)
Update Short Bibliographic Records (manage-07)
Update Index for Selected Records (manage-40)
Build Counter for Logical Bases (manage-32)
Update Brief Records (manage-35)
Create Links between Records (manage-12)

**Task Manager**

**Manage Database Tables**
Create Links Between Records (manage-12)
Count Library Tables (manage-06)
Organize Database Tables (manage-08)
Export Database Tables (file-03)
Import Database Tables – Without Checks (file-04)
Import Database Tables – With Checks (file-06)
Check for Duplicate Keys (file-09)
Create Filing Keys for Names (manage-64)

**Printing**
Sort Printouts by Patron Report (print-50)

**General**
Print Trigger Report (com-01)