



Staff User's Guide – Staff Privileges

Version 22

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1 Staff Privileges

The Staff Privileges function enables you to add new staff members (users) to the system and to assign them passwords and access rights. Passwords are always changed to uppercase, unless your system is running in Kerberos mode.

1.1 Staff Privileges in a Single/Multi-ADM Environment

Multi-ADM Environment

In a multi-ADM environment it is important to have both autonomy and limitations within the group of libraries related to the particular ADMinistrative library. In order to achieve this functionality, the User Library field in the User Password Information form defines which library group is authorized.

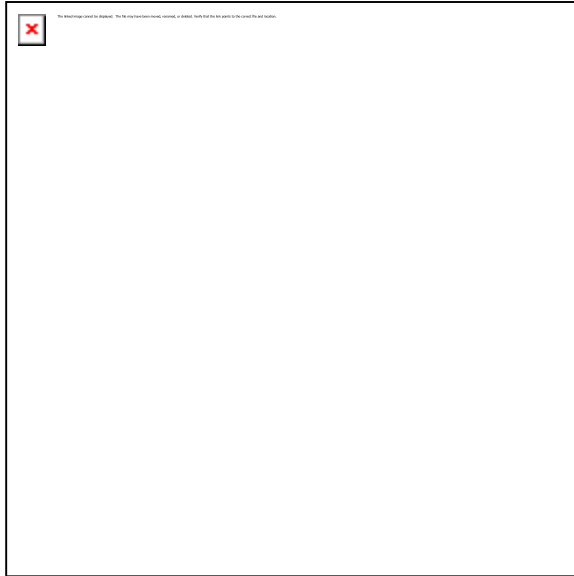
For password control, there is a "super user" who is assigned ADMIN in the User Library field. He can create a user who is authorized to create and/or update passwords and authorizations for a particular ADM library group. This new user must be assigned an ADM library and the privileges that allow him to create new users. This user will be able to assign any of the libraries in the ADM group to a user.

When ALEPH is installed, the "master user" included in the system is username/password (details available from your project manager or support desk). This user is authorized for creating users. In a multi-ADM setup, when setting up password authorizations, the first step is to open a user for each password group (for example, ADM library); this user is assigned privileges for creating/updating users who can be assigned privileges in any of the libraries that are included in the ADM library group. For example, in the following setup:

```
PAS USM50 USM01 USM10 USM60 USM20 USM30
PAS USM51 USM01 USM10 USM60
```

The user with password authorization for creating/updating users in USM50 will be able to assign the USM01, USM10 USM60 USM20 USM30 libraries to the user being created/updated. The user with password authorization for USM51 will be able to assign only USM01 USM10 and USM60 libraries to the user being created/updated.

The ADM groups are set up in the PAS line in the
./alephe/tab/library_relation configuration table as shown above.




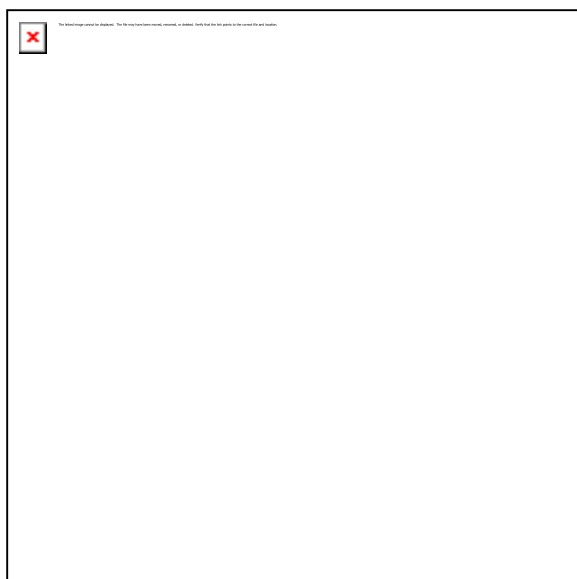
When the Staff Privileges function is opened, the system displays a list of users, username and the libraries for which the user has been assigned authorizations. The list can be set to display all users, or only users that belong to the same ADM group as the logged in user.

Single-ADM Environment

A single-ADM environment does not need to define the PAS relation in the `library_relation` table. In this case, all users have the ADMIN value in the `user_library` field (Z66), and every user can see the privileges of all the other users in the environment. You do not need to create a "master user" for the ADM library - the "super user" can directly create/update the staff users.

1.2 Staff Privileges Window

To access the Staff Privileges functionality right-click the key icon  on the Operations bar (at the bottom right of the screen) and select Staff Privileges. The Staff Privileges window is displayed:



This screen lists the users in the system. To select a user, scroll through the list. Alternatively, enter part of the user name in the space provided and press Enter. The list will automatically scroll to the first matching user name.

Note

In a multi-ADM environment, in order to display only users with the same User Library as the connected user, select the checkbox at the top of the screen. If the check box is not selected, users for all libraries will be displayed. The buttons on the right side of the window will be activated only when the highlighted user in the list is assigned to the same ADM library as the connected user.

New User

To add a new staff member to the list of users, click **New**. The User Password Information form will pop up for you to fill in the user name, password, cataloger level, etc. When you are finished filling in the form, the new user will appear in the list of users. Then, to assign access rights to this user, highlight the name on the list and click **Access Rights**.

Modify User

To modify a user's password or cataloger level, highlight the name on the list and click **Modify User**. The User Password Information form will pop up for you to edit.

Duplicate User

To add a new user by copying an existing user's details, highlight a user on the list and click **Duplicate User**. The User Password Information form will pop up for entering new user information. The new user will be assigned the same privileges as the user chosen for duplication.

Delete User

To delete a user, highlight the user and click **Delete**. Do not delete the ALEPH user unless you have first created another user with the access rights to assign passwords. The only way to reinstate the ALEPH user is to delete the files that contain user

names and passwords (files Z66 and Z67), using UTIL A/17/1. Consult Ex Libris before doing this.

Access Rights

To view or modify a user's access rights to various functions in the system, highlight the user name and click **Access Rights**. Choose the library you are interested in, and click **OK**. The User's Access Rights window will be displayed.

Note that if a user has been assigned a proxy, you cannot view or modify the user's access rights directly. Since the user automatically receives the same access rights as the proxy, in order to view or change access rights for the user, you must view or change the access rights for the proxy. Any number of users may be assigned the same proxy. If you change the access rights for the proxy, the access rights of all users having this proxy will also be changed.

Summary

To view the complete list of libraries, functions and subfunctions to which a user has access, highlight the user's name and click **Summary**. Note that the permissions tree that opens up displays only those actions for which a permission (allowed or denied) has been specified.

Display Proxies

To display the list of proxy users assigned to a specific user, select the user's name by highlighting it and click **Display Proxies**.

Budgets

Use the **Budgets** button to assign allowed budget/s for the user.

Sublibraries/Order Units

This button can be labeled Order Units or Sublibraries, depending on your system setup: If your Acquisitions system is set to work with order units, name this field Order Units. If your Acquisitions system is set not to work with order units but with sublibraries, then name this field Sublibraries.

Use the Sublibraries/Order Units button to assign allowed Sublibraries/Order Units for the user in Acquisitions. If there is more than one Administrative library, after you click **Budgets** you will be asked to choose the Administrative library. The Administrative library displayed is the Administrative library assigned to the connected user. You must select the allowed sublibraries/order units, otherwise the user will not be permitted acquisitions activity in any sublibrary/order unit. The system first checks whether the user has permission for the action (user's access rights) and then checks whether he has sublibrary/order unit rights for the sublibrary/order unit. Only if both checks are successfully concluded is the user allowed access to these functions.

1.3 User - Password Information

When you click **New User**, **Modify User** or **Duplicate User**, the following form will be displayed:

User Library

This field defines the ADM library to which the staff user is assigned. The ADM library is used to define the sphere within which the staff user is assigned privileges, and by inference includes other library types that are contained within the same sphere. The value in this field is selected from the drop-down list. The list contains the one ADM library that has been assigned to the staff user who is authorized for creating/updating passwords and authorizations for the library. Each system also has at least one 'super' staff user who is authorized to create staff users who can create/update passwords. The drop-down list for this super user includes all the ADM libraries. A staff user with 'ADMIN' in this field can be assigned privileges in all the libraries.

User

The user name is the unique string by which the system identifies the user. The user name may be up to 10 alphanumeric characters.

Password

A password is required in order to use every ALEPH module except for the OPAC. Enter a password up to 10 alphanumeric characters. The password you enter will not be displayed.

Cataloger Level

This information is used only in the Cataloging module. When a catalog record is edited and saved on the server, the level of the cataloger is assigned to the record. In order for someone else to update the record, he must have a level equal to, or higher than, the level assigned to the record. Note that the higher the level, the greater the access. (For example, level 99 can see every record.)

Function Proxy

If you want the selected user to have exactly the same access rights as another user, enter the user name of the other user here. (This other user is referred to as the "proxy" for your selected user.) Note that if you assign a proxy to the selected user, you will not then be able to define access rights for the selected user. Rather, he will automatically receive the same access rights as the proxy. In order to change access rights for the selected user, you must change the access rights for the proxy. Any number of users may be assigned the same proxy. If you change the access rights for the proxy, the access rights of all users having this proxy will also be changed.

Note

In a Multi-ADM environment a proxy can be assigned only for a staff user belonging to the same ADM library.

Cataloger Proxy

This field contains the user name of the cataloger proxy. This is used to define that the user has exactly the same allowed/denied tag permissions and the same OWN definitions as another user. This other user is referred to as the "cataloger proxy" for the selected user. If a cataloger proxy is assigned, there is no need to create entries for the user in the `permission.dat` table (this table is used to define cataloging allowed and denied tags for users) and there is also no need to fill in the OWN definition fields. The proxy's definitions are used.

Note

In a Multi-ADM environment a proxy can be assigned only for a staff user belonging to the same ADM library.

Budget Proxy

This field contains the user name of the budget proxy. This is used to specify that the user has exactly the same allowed/denied budget permissions as another user. This other user is referred to as the "budget proxy" for the selected user. If a budget proxy is assigned, there is no need to create budget permissions for the user. Instead, the proxy's definitions are used.

Note

In a Multi-ADM environment a proxy can be assigned only for a staff user belonging to the same ADM library.

Order Unit/Sublibraries Proxy

This field can be labeled Order Unit Proxy or Sublibraries Proxy, depending on your system setup: If your Acquisitions system is set to work with order units, this field should be named Order Unit Proxy. And if your Acquisitions system is set to work not with order units but with sublibraries, then this field should be named Sublibraries Unit Proxy.

This field contains the user name of the order unit proxy. This is used to define that the user has exactly the same order units/sublibraries privileges as another user. This other user is referred to as the Order Unit/Sublibraries Proxy for the selected user. If

an Order Unit/Sublibraries Proxy is assigned, there is no need to create order unit/sublibraries permissions for the user. Instead, the proxy's definitions are used.

Note

In a Multi-ADM environment a proxy can be assigned only for a staff user belonging to the same ADM library.

Cat. OWN ID

Use this field to enter the text that will be written in the OWN field of the Cataloging record. This option is relevant only if the library uses the option for automatic generation of the OWN field.

Select the Cat. Own ID from the list, by clicking the arrow to the right of the field.

Note

Place a value in this field only if you want to prevent certain catalogers from updating the records created by this cataloger, even if they have the appropriate Cataloger Level (see above). If you want all catalogers with the appropriate level to be able to update the records created by this cataloger, then leave this field blank.

Cat. OWN Permission

Use this field to enter the OWN field value of the cataloging records that this user is allowed to update. Enter GLOBAL to allow this user to update all records, regardless of OWN field. This option is relevant only if the library uses the OWN field in cataloging records.

Select the Cat. Own Permission from the list, by clicking the arrow to the right of the field.

Note that if the user is a proxy for another user, then the OWN values for the user are taken from the proxy's record (Cat. OWN ID and Cat. OWN Permission).

The `tab_own` table lets you translate the single Cat. OWN Permission value into multiple permissions (if this user needs to be able to update records with various OWN values -- but cannot have GLOBAL permission).

Circ. Override Level

This information is used only in the Circulation module. In order to override a specific error message a librarian must have a level equal to, or higher than, the level assigned to the error message. Note that the higher the level, the greater the permission to override. (For example, level 99 can override every message.)

ILL Unit

The ILL unit in which the staff user is authorized to manage requests. The drop-down list of allowed ILL units depends on the type of user that is being defined. If the user belongs to a specific administrative unit, then the ILL units of that specific administrative unit will be displayed. If the staff user is an ADMIN type then all ILL units will be displayed.

The ILL Unit can be set to ADMIN. In that case, the staff user is allowed to manage ILL partner records but not a specific ILL unit's incoming and outgoing requests

Name

The name of the staff user.

Department

A department that is associated with the staff user.

Note 1 and Note 2

A general note that is attached to the staff user.

Email

The staff user's e-mail address.

Address

The staff user's address.

Telephone

The staff user's telephone number.

Expiry Date

The staff user's expiry date. The staff user will be blocked from logging into the system after this date.

Last Alert Date

The last date that the staff user was alerted concerning an upcoming block.

Blocked

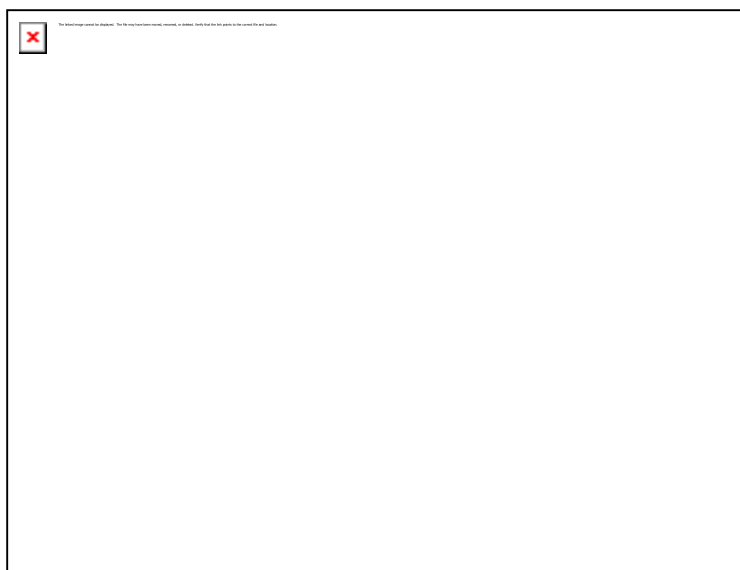
Whether or not the staff user is blocked from accessing the system.

Block Reason

In the event that the staff user has been blocked, the reason for the block can be entered here.

1.4 User's Access Rights

When you click the Access Rights button the following screen will be displayed:



This screen lists the libraries to which the user can be assigned. The list of libraries displayed depends on the ADM library assigned in the User_library field. The ADM library is used to define the sphere within which the staff user is assigned privileges, and by inference includes other library types that are contained within the same sphere.

The PAS line in the `./alephe/tab/library_relation` configuration table defines which libraries are included in the sphere of the ADM library. For example:

```
PAS USM50 USM01 USM10 USM60 USM20 USM30 USR00 USM90
```

If you have connected to the GUI with an operator whose Z66-USER-LIBRARY is USM50, the list of libraries displayed in the Access Rights window will include USM50, USM01, USM10 and USM60, USM20, USM30, USR00, USM90. Libraries that have a plus sign (+) next to the library code have sublibraries associated with them. To view the list of sublibraries, double-click the + library.

Note: ALEPH will be listed if both the connected user and the selected user are ADMIN users or if ALEPH is in the PAS list of the ADM to which the selected user belongs.

To select the library for which you want to view or modify access rights, highlight the library and click **OK**. The window displayed and the task you can perform with it depend on the type of library you choose:

Global Library without Sublibraries

If you choose a global library that does **not** have sublibraries (there is no + next to the library code), you will be able to add or delete access rights for the selected global library.

Global Library with Sublibraries

If you choose a global library that **does** have sublibraries (the + symbol appears next to the library code), you can modify access rights either for the global library or for individual sublibraries. Choose one of the sublibraries to limit all permissions to the chosen sublibrary. Alternatively, you can choose one or more sublibraries when you modify the user's access rights, as explained in Modify Permitted Sublibraries on page 19.

Individual Sublibrary

If you select an individual sublibrary, you will be able to modify access rights for that one sublibrary only.

Sublibrary Sensitivity

You can create permissions for creation, deletion or update on the sublibrary level (and not only on the ADM level) for the following:

- In both Cataloging and Circulation, records that have sublibrary identification - Local Patron Records, items and all item-related actions
- In Circulation, some of the actions on a patrons list of loans (sublibrary is checked for Delete, Declare lost, Claim returned, and Renew but not for Change date)
- In Circulation and Acquisitions, some of the batch services receive sub-library as a parameter. This is in order to display only permitted sub-libraries in the list in the service's form dialog box.

Note:

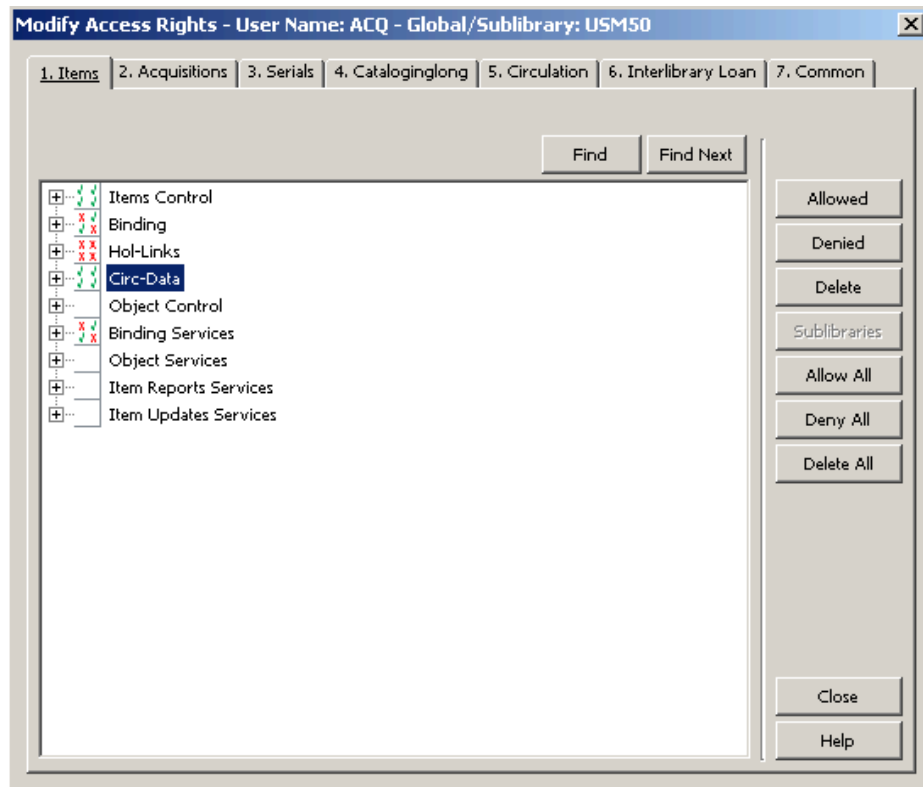
The **Sublibrary** button is accessible only if the highlighted permission is sublibrary sensitive.

Note that sublibrary (or order unit) sensitivity for acquisition orders and budgets is controlled by assignments made through the **Budgets** and **Order Units** buttons on the Staff Privileges main window (the Staff Privileges list), and sublibrary sensitivity for Circulation Charge and Discharge is defined per workstation, and not per user.

Note: ALEPH will be listed if both the connected user and the selected user are ADMIN users or if ALEPH is in the PAS list of the ADM to which the selected user belongs.

1.4.1 Modify User's Access Rights

After selecting a library, the following screen will be displayed:



This window allows managing a specific user's privileges in the selected library or sublibrary. The window is divided into tabs, with each tab listing actions that are relevant to that single module. Another **Common** tab lists actions that are not module specific.

Within each tab the actions are arranged in groups so that each group contains actions that make up a specific workflow, such as **Ordering** or **Loan Management**. The group may be expanded to view all of the actions it consists. In addition, each group's **All Unspecified Subfunctions** action enables implicitly allowing all of the group's actions that have not been explicitly denied.

Note: Denying the **All Unspecified Subfunctions** action forces a denial on all of the group's actions, even if they have been explicitly allowed.

The group's status is marked by an icon, and may be one of the following:

- **Fully allowed** – All of the group's actions are allowed.
- **Fully denied** – All of the group's actions are denied.
- **Not specified** – None of the groups actions has been allowed nor has any action been denied.
- **Partially allowed** – The groups actions have more than one of the above statuses.

The specific actions' status is marked by a check mark if allowed and by a X sign if denied.

Managing the user's privileges may be done either at the group level, by selecting the group title and allowing or denying the entire group, or at the specific action level, by selecting a specific action and allowing or denying it.

The following buttons may be used:

Allowed

Allow the selected group or action.

Denied

Deny the selected group or action.

Delete

Delete the status that is currently assigned to the group or action.

Sublibraries

Select from a list of the selected library's sublibraries, to set a status (allowed or denied) only at the sublibrary level. This action is accessible only for actions whose privileges are sublibrary sensitive.

Allow All

Allow all of the actions in the selected module.

Deny All

Deny all of the actions in the selected module.

Delete All

Delete all of the explicitly assigned privileges in the selected module.

Note

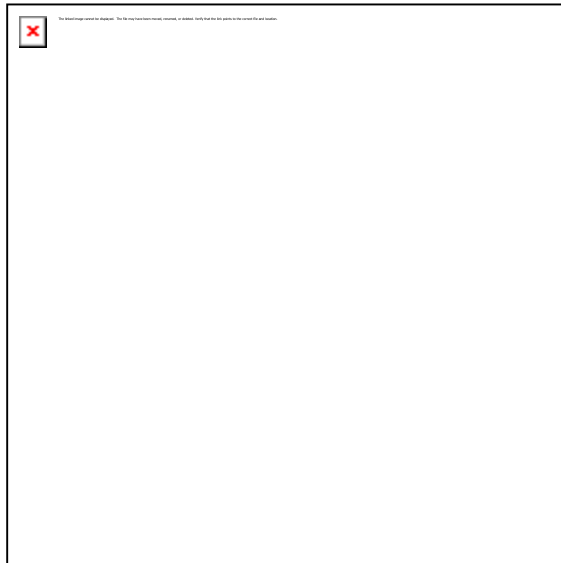
User Passwords and User Profiles are not included in the **Common** tab's **All Functions** action. In other words, **All Functions** refers to every function EXCEPT User Passwords and User Profiles. If you want to give a user access rights to User Passwords or User Profiles, you have to choose these specifically, and not just give access to **All Functions**.

Note that the system distinguishes between the right to display a record and the right to update the record. If you want a user to be able to read a record but not change the information, then assign **Display rights only**. However, if you wish to assign the right to update a record, you must also assign the right to display the record.

Display-only access is useful for an installation with a number of sublibraries. You may wish to give display-only access to a user so that he can read the records of a sublibrary that is not his own.

1.4.2 Modify Permitted Sublibraries

When you click the **Sublibraries** button on the Modify User's Access Rights window, the screen below is displayed:



The left side of this screen, Permitted Sublibraries, lists the sublibraries for which the user has access to the selected subfunction.

The right side of the screen, Available Sublibraries, lists all sublibraries of the selected global library.

To give the user access to a function for a particular sublibrary, highlight the sublibrary in the right-hand list and click the left arrow with the check mark. The highlighted sublibrary will then appear in the Permitted column on the left side of the screen, with the letter Y in the Allowed column.

Note

The system limits the number of a user's sublibraries that can be assigned to a specific function/subfunction to 100.

To remove a sublibrary from the Permitted column, highlight the sublibrary and click the Right arrow.

Optionally, you can assign a global library access (by clicking **Allowed** on the first Modify Access Rights window), and then deny this access for one or more sublibraries.

To deny user access to a function for a particular sublibrary, highlight the sublibrary in the right-hand list and click the left arrow with the X sign. The highlighted sublibrary will then appear in the Permitted column on the left-hand side of the screen, with the letter N in the Allowed column.

To highlight more than one sublibrary, hold down the Ctrl key while clicking the

desired sublibraries. To highlight an entire range of sublibraries, click the first sublibrary in the range, then, while holding down the Shift key, click the last sublibrary in the range.

Note

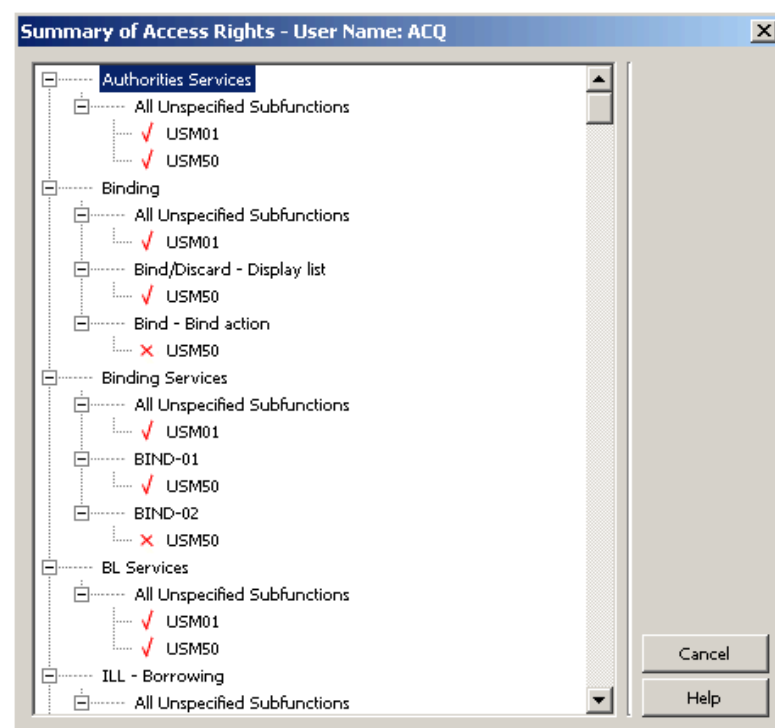
In ALEPH, the loan and return of items from a specific sublibrary is not controlled via the staff user names and passwords but rather via the IP identification of the PC.

This is done in the ADM library \$data_tab/tab_attr_sub_library table, or - if not found - in the \$alephe_tab/tab_attr_sub_library table (see the Circulation System Librarian chapter for more information).

1.5 Summary of Access Rights

The Summary of User's Access Rights window enables you to view the complete list of functions and subfunctions to which a user has access.

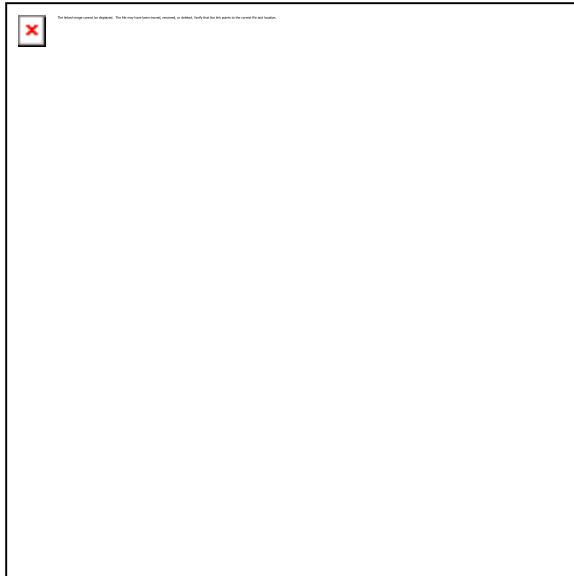
To change the access rights, return to the Staff Privileges window (by clicking **Close**) and then click **Access Rights**.



The window lists only the actions for which a privilege has been explicitly assigned (allowed or denied).

Viewing Proxy Users

When you click **Display Proxies**, the following screen will be displayed:

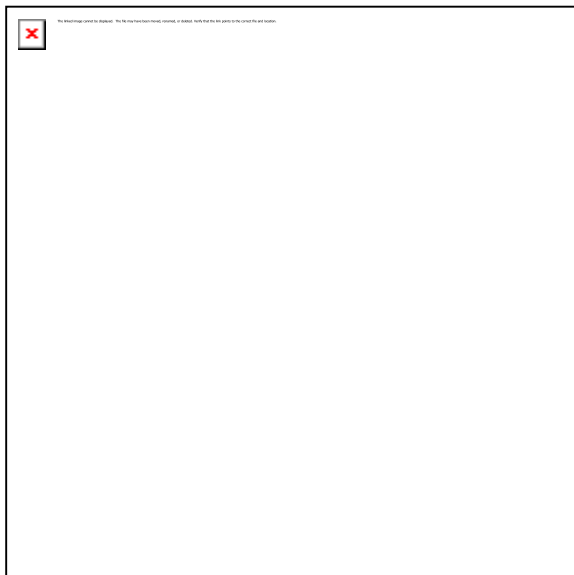


The Proxy Users list window enables you to view the complete list of proxy users assigned to a specific user.

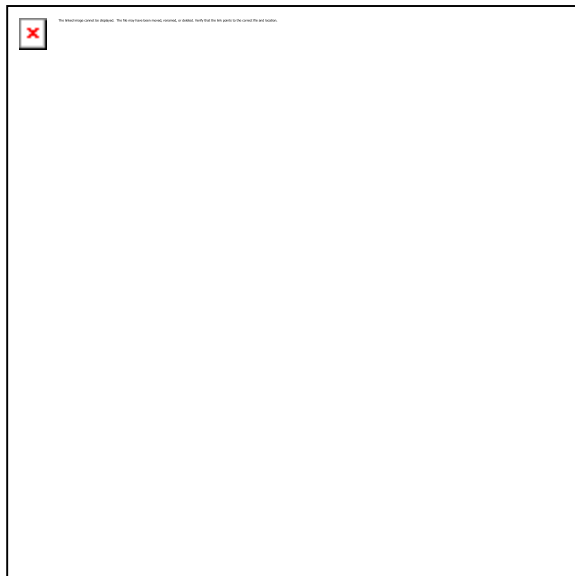
To switch to one of the users displayed in the list, highlight the user and click **Select**.

1.6 User's Budget Permissions

The Budgets button in the Privileges window is used to assign budget permissions for the user. After you click **Budgets**, the Choose Administrative Library window will be displayed:



Highlight the relevant administrative library and click **OK**. The Budget Permissions for User window will be displayed.



This window displays a list of the user's budget permissions. The list is divided into five columns:

1. Budget Code
2. Alloc (Allocation)
3. Trans (Transfer)
4. Enc (Encumbrance)
5. Exp (Expenditure)

If Y (Yes) is displayed under the budget transaction, this means that the user has permission for this transaction type. If N (No) is displayed under the budget transaction, this means that the user has no permission for this transaction type.

Note

In the Budget column, an asterisk (*) can be displayed to represent a group of budgets.

For example: If *-2002 is displayed in the budget column, this refers to all budgets that end with -2002. If HISTORY-*, is displayed in the budget column, this refers to all budgets that start with HISTORY. If * is displayed in the budget column, this refers to all budgets.

Modify

To modify a specific budget permission, highlight the budget's permission and click **Modify**. The Budget's Transaction Permissions window will be opened.

Add

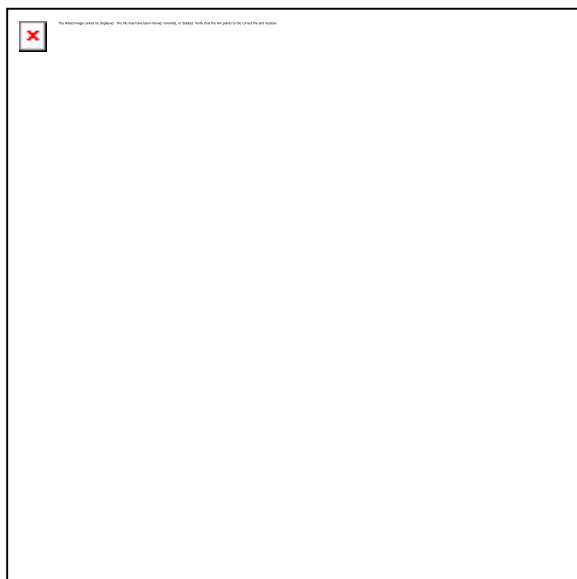
To add a new budget permission, click **Add**. The Budget's Transaction Permissions window will be opened for you to add the new budget permission.

Delete

To delete a budget permission, click **Delete**.

1.6.1 Budget's Transaction Permissions

When you click **Add** or **Modify** in the Budget Permission for User, the Budget's Transaction Permissions window will be opened:



This window enables you to assign budget permissions for a user. In the budget field, type in or select from the list a budget code. You may use an asterisk (*) to assign user permissions for a group of budgets. For example: If you type in budget code *-2002, all budgets that end with -2002 will be permitted to the user. If you type in HISTORY-*, all budgets that start with HISTORY will be permitted to the user. If you type in *, all budgets will be included.

After typing or selecting the budget code, check the relevant budget transaction permission/s for the user:

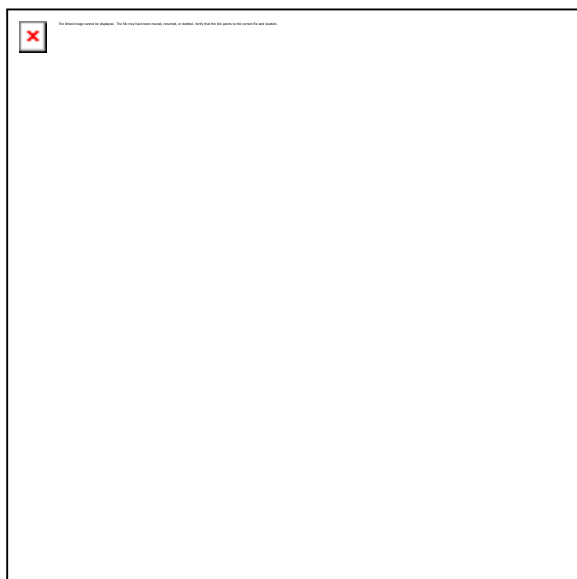
- Allow Budget Allocation
- Allow Budget Transfer
- Allow Budget Encumbrance
- Allow Budget Expenditure

Click **OK** to add the selected budget permission/s to the Budget Permission for User list.

1.7 Sublibraries / Order units

When you click Order Units or Sublibraries in the Staff Privileges window, the Sublibrary / Order Units management screen will be displayed (note that if you are

working in a multi-ADM library environment you will need to select an ADM library first). The list can contain sublibraries or order units, depending on whether your Acquisitions system is set to work with sublibraries or with order units.

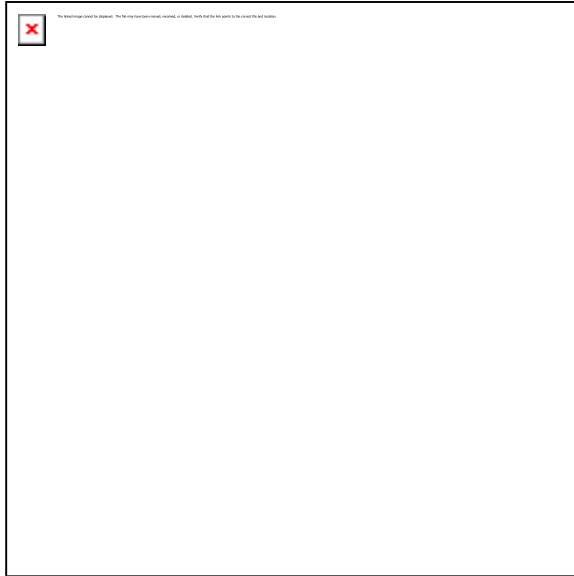


The user is allowed to be active in Acquisitions only in the selected sublibraries/order units. You must select the allowed sublibraries/order units, otherwise the user will not be permitted acquisitions activity in any sublibrary/order unit. The system first checks whether the user has permission for the action (user's access right) and then checks whether he has sublibrary/order unit rights for the sublibrary/order unit. Only if both checks are satisfactorily passed is the user allowed access to these functions.

To assign a sublibrary/order unit to a user, go to the right-hand list, highlight the desired sublibrary/order unit, and click the left arrow. The sublibrary/order unit will move to the left-hand list. To highlight more than one sublibrary/order unit at a time, hold down the Ctrl key while clicking each desired sublibrary/order unit. To highlight a continuous range of sublibraries/order units, highlight the first sublibrary/order unit in the range, then hold down the Shift key and highlight the last sublibrary/order unit in the range. To remove a sublibrary/order unit from a user, go to the left-hand list, select the unwanted sublibrary/order unit, then click the right arrow. The sublibrary/order unit will move to the right-hand list.

1.8 Display of Libraries in ALEPH Services

Every service in ALEPH (for example, Print Trigger Report (com-01)) contains a **Library** field. Staff users select the library on which they want to run the service from the drop-down list of libraries.



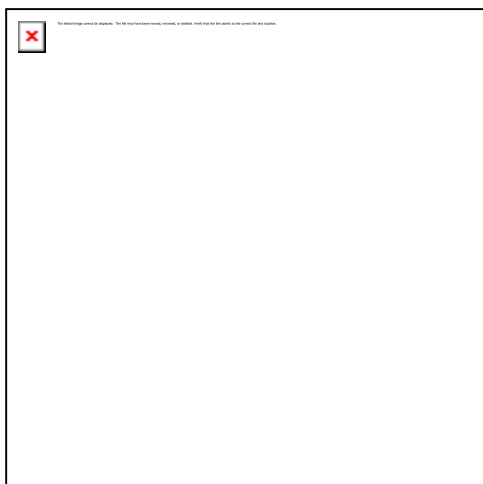
These libraries are made available by the setting in the PAS line in the `./alephe/tab/library_relation` configuration table for the ADM library (for example, USM50) to which the active user has password authorization:

```
PAS USM50 USM01 USM10 USM11 USM12 USM14 USM15 USM19
```

If the user is an ADMIN user (superuser), the list will display all of the ALEPH libraries.

1.9 Display of Libraries in the Task Manager Window

The Task Manager window contains a **Connect to:** field. Staff users who want to work with files that have been produced by various ALEPH functions select the appropriate library from the drop-down list:



These libraries are made available by the setting in the PAS line in the `./alephe/tab/library_relation` configuration table for the ADM library (for example, USM50) to which the active user has password authorization:

PAS USM50 USM01 USM10 USM11 USM12 USM14 USM15 USM19

If the user is an ADMIN user (superuser), the list will display all of the ALEPH libraries.

2 ALEPH User Privileges

Below is a list of the ALEPH user privileges.

2.1 Items

2.1.1 Items Control

Function	Location	
	Tab	Node
Items - Display list	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items
Filter items list (History, Tree, etc.)	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items Expand Item Information
Item - Print label	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items
Items - Global Changes	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items
Item - Display form	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items Create and update item
Item - Update	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items Create and update item
Item - Delete	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items
Item - Delete by override a block	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items
History - Display history list	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Serials 	History (Item Changes tab)
History - Restore item from history	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Serials 	History (Item Changes tab)
History - Delete item history line	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Serials 	History (Item Changes tab)
Inventory online marking	Cataloging	Items\Inventory Marking menu option
Invoice field - Display invoice list	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items Expand 'Invoice Key' field

2.1.2 Binding

Function	Location	
	Tab	Node
Bind/Discard - Display list	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items 'Item List for Binding' dialog

Function	Location	
	Tab	Node
Bind - Bind action	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items 'Item List for Binding' dialog

2.1.3 Hol-Links

Function	Location	
	Tab	Node
HOL links - Display list	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items HOL-Link tab in right lower pane
HOL links - Link item	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items HOL-Link tab in right lower pane
HOL links - Unlink item	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Orders Acquisitions\Serials 	<ul style="list-style-type: none"> Items List Items HOL-Link tab in right lower pane

2.1.4 Circ-Data

Function	Location	
	Tab	Node
History - View circulation history	<ul style="list-style-type: none"> Cataloging\Items Acquisitions\Serials 	Circ Summary

2.1.5 Object Control

Function	Location	
	Tab	Node
Object - Retrieve object information	Catalog\items	Objects List
Object - Update	Catalog\items	Objects List
Object - Delete	Catalog\items	Objects List
Object - Display info	Catalog\items	Objects
Object - Display list	Catalog\items	Objects List
Create Scan Job	Catalog\items	Objects List

2.1.6 Binding Services

Service Name	Service Description
bind-01	Print Bind Alert Report
bind-02	Print Serial Binding Slips

2.1.7 Object Services

Service Name	Service Description
adam-01	Create Digital Objects Upload File
adam-02	Import Records and Digital Objects
adam-03	Change Object Location
adam-04	Export Records
adam-05	Create Thumbnail or Full Text
adam-06	Technical Report
adam-07	Usage Report
adam-08	Create Digital Objects Upload File from DigiTool Export

2.1.8 Item Reports Services

Service Name	Service Description
ret-adm-01	General retrieval form
ret-adm-02	Report of missing items
item-03	Print items labels
item-04	Shelf reading report
item-05	Shelf list
item-07	Inventory List
item-09	Inventory summary report
item-10	Inventory report

2.1.9 Item Updates Services

Service Name	Service Description
item-01	Initiate an Inventory
item-06	Re-build Call No. Index
item-08	Inventory batch marking
item-11	Delete Item Records
manage-28	Create new Z311 table
MANAGE-62	Update item records

2.2 Acquisitions Module

2.2.1 Order-index

Function	Location	
	Tab	Node
Order Search - Order index	Order Search	Index List
Order Search - New/Cancelled index	Order Search	New & Cancelled Order Index

2.2.2 Ordering

Function	Location	
	Tab	Node
Orders - Display list for single record	Order	Order List
Order - Retrieve order information	Order	Order List (expanded information)
Order - View summary information	Order	Order
Order - Update	Order	Order List
Order - Handle order which is not NEW	Order	Order List
Order - Delete	Order	Order List
Order log - View	Order	Order Log
Order log - Update	Order	Order Log
Budget for Order - Display	Order	Encumber
Budget for Order - Update	Order	Encumber
Order - Assign budget	Order	Invoice (Create button in Budget List of invoice)
Display Vendor	Order	Select vendor in order form
Catalog for Order	Orders\Catalog Order menu option	

2.2.3 Order-Claim

Function	Location	
	Tab	Node
Order - Claims - Display list	Order	Claims
Order - Claim - Display	Order	Claims (expand information)
Order - Claim - Update	Order	Claims
Order - Claim - Delete	Order	Claims

2.2.4 Material-Arrival

Function	Location	
	Tab	Node
Material Arrival - Display list	Order	Arrival
Material Arrival - Display single	Order	Arrival (expand information)
Material Arrival - Update	Order	Arrival
Material Arrival - Delete	Order	Arrival

Function	Location	
	Tab	Node
Material Arrival - Print arrival slip	Order	Arrival

2.2.5 Invoicing

Function	Location	
	Tab	Node
Order - View summary information	<ul style="list-style-type: none"> • Invoice • Order 	<ul style="list-style-type: none"> • Line Items (order information in lower pane) • Invoice
Budget for Invoice - Update	<ul style="list-style-type: none"> • Invoice • Order 	<ul style="list-style-type: none"> • Line Items (add budget in budget list of invoice) • Invoice
Budget for Invoice - Display	<ul style="list-style-type: none"> • Invoice • Order 	<ul style="list-style-type: none"> • Line Items (add budget in budget list of invoice) • Invoice
Invoice - Change invoice number	<ul style="list-style-type: none"> • Invoice • Order 	<ul style="list-style-type: none"> • General Invoice (Change Invoice Number button) • Invoice
Invoice, general - Display	Invoice	General Invoice
Invoice, general - Update	Invoice	General Invoice
Invoice, general - Delete + debits	Invoice	General Invoice
Invoice, general - Update "Released (REG)"	Invoice	General Invoice (special tab48.lng permission)
Invoice, general - Update "Not approved"	Invoice	General Invoice (special tab48.lng permission)
Invoice, general - Update "Preliminary approval"	Invoice	General Invoice (special tab48.lng permission)
Invoice, general - Update "Approved and printed"	Invoice	General Invoice (special tab48.lng permission)
Invoice, general - Update "Frozen (ADJ)"	Invoice	General Invoice (special tab48.lng permission)
Invoice - Update although "Payment authorized"	Invoice	General Invoice (special tab48.lng permission)
Invoice - Update although "Paid"	Invoice	General Invoice (special tab48.lng permission)
Invoice - Display list of line items	<ul style="list-style-type: none"> • Invoice • Order 	<ul style="list-style-type: none"> • Line Items • Invoice
Invoices - Display list of line items	Order	Invoice (creating new invoice line)
Invoice - Display line item form	<ul style="list-style-type: none"> • Invoice • Order 	<ul style="list-style-type: none"> • Line Items • Invoice
Invoice - Update line item	<ul style="list-style-type: none"> • Invoice • Order 	<ul style="list-style-type: none"> • Line Items • Invoice
Invoice - Delete line item	<ul style="list-style-type: none"> • Invoice 	<ul style="list-style-type: none"> • Line Items
Invoice - Assign budget	<ul style="list-style-type: none"> • Invoice • Order 	<ul style="list-style-type: none"> • Line Items • Invoice
Print Invoice with line items	Invoice	General Invoice

2.2.6 Vendor Maintenance

Function	Location	
	Tab	Node
Vendor - Display	Administration	Vendor
Vendor - Update	Administration	Vendor
Vendor - Delete	Administration	Vendor
Sub-vendor - Display	Administration	Vendor
Sub-vendor - Update	Administration	Vendor
Sub-vendor - Delete	Administration	Vendor

2.2.7 Budget Maintenance

Function	Location	
	Tab	Node
Budgets - Display list	Administration	Budgets
Budget - Balance - Display	Administration	Budgets (lower pane Balance tab)
Budget - Transfer action	Administration	Budgets (lower pane Transactions tab)
Budget - Display	Administration	Budgets
Budget - Update	Administration	Budgets
Budget - Delete	Administration	Budgets
Budget (Order Unit) - Balance - Display	Administration	Budgets
Budget (Order Unit) - Display	Administration	Budgets
Budget (Order Unit)- Update	Administration	Budgets
Budget (Order Unit) - Delete	Administration	Budgets
Budget Transactions - Display list	Administration	Budgets (lower pans Transactions tab)
Budget Transaction - Assign	Administration	Budgets (lower pans Transactions tab)

2.2.8 Currency Utilities

Function	Location	
	Tab	Node
Currencies - Display list	Administration	Currency
Currency - Update	Administration	Currency

2.2.9 Info Services

Service Name	Service Description
acq-03	Print records

2.2.10 Maintenance Services

Service Name	Service Description
acq-04	Rebuild order index

2.2.11 Budget Services

Service Name	Service Description
acq-05	Open annual budgets
acq-06	Renew order encumbrances
acq-07	Transfer remaining balance
acq-08	Update local price of budget transaction
acq-09	De-activate encumbrances
acq-16	Budget summary
acq-17	Budget's order summary
acq-31	Transfer orders from one budget to another
acq-55	Budget Allocations
acq-97	Budget's Orders

2.2.12 Vendor Services

Service Name	Service Description
acq-60	Vendor Address Data Update Report

2.2.13 Claim Services

Service Name	Service Description
acq-11	Standing orders to claim
acq-12	Claim report and letters
acq-19	Claim Report for Serials Orders

2.2.14 Currency Services

Service Name	Service Description
acq-01	Currency report
acq-20	Upload Currency Ratios

2.2.15 Invoicing Services

Service Name	Service Description
acq-10	Invoice report
acq-21	BANNER/FRS Export

2.2.16 Ordering Services

Service Name	Service Description
acq-02	Order Record retrieval
acq-14	Send list of orders to vendor
acq-22	Order-Log Report
acq-23	Subscription Renewal Letters
acq-24	General ADM and Orders Creation
acq-25	Statistics by Dates - Material/Month

Service Name	Service Description
acq-26	Update Vendor Code in Order and Subscription Records
acq-27	Replace Vendor - Close and open Orders and Subscriptions
acq-28	Change Order Status and EDA in Order Records
acq-30	Export Orders
file-96	Load YPB Records

2.2.17 EDI Services

Service Name	Service Description
edi-09	Process EDI Incoming Messages
edi-10	Load EDI Incoming Messages
edi-11	Send Outgoing EDI messages

2.3 Serials

2.3.1 Issue

Function	Location	
	Tab	Node
Check In - Arrive	Serials	<ul style="list-style-type: none"> • Check In • Group
Check In - Unarrive	Serials	<ul style="list-style-type: none"> • Check In • Group
Group - Display list	Serials	Group
Group - Update line	Serials	Group
Group - Delete line	Serials	Group
Items - Display items list	Serials	<ul style="list-style-type: none"> • Items • Items List

2.3.2 Pattern

Function	Location	
	Tab	Node
Patterns - Display list	Serials	Patterns (Patterns tab)
Pattern - Display	Serials	Patterns (Patterns tab)
Pattern template	Serials	Patterns (Template button)
Pattern - Update	Serials	Patterns (Patterns tab)
Pattern - Delete	Serials	Patterns
Pattern Level-X - Display list	Serials	Patterns (Level X tab)
Pattern Level-X - Display	Serials	Patterns (Level X tab)
Pattern Level-X template	Serials	Patterns (Level X tab)
Pattern Level-X - Update	Serials	Patterns (Level X tab)
Pattern Level-X - Delete	Serials	Patterns (Level X tab)
Pattern Level-X - Expected schedule	Serials	Patterns – View items in lower pane when Level-X tab is selected
Expected Schedule - Open items	Serials	Patterns – Open items from lower pane button when Level-X tab is selected.

2.3.3 Schedule

Function	Location	
	Tab	Node
Schedule record - Display	Serials	Schedule
Schedule record - Update	Serials	Schedule
Schedule record - Delete	Serials	Schedule
Schedule - Open items	Serials	Schedule

2.3.4 Subscription

Function	Location	
	Tab	Node
Subscriptions - Display list	Serials	Subscription List
Subscriptions - Display info	Serials	Subscription List (Info List is lower pane)
Display subscriptions	Serials	Subscription List (expand in lower pane)
Update subscriptions	Serials	Subscription List
Delete subscriptions	Serials	Subscription List
Use vendor defaults (Delay, Delivery Type)	Serials	Subscription List (Change subscription's vendor)
Expected Schedule - Open items	Serials	Subscription List (Open All button)

2.3.5 Claim

Function	Location	
	Tab	Node
Claims - Display list	Serials	Claims
Claims - Display claim	Serials	Claims (lower pane expanded information)
Claims - Send claim	Serials	Claims
Claims - Register vendor's reply	Serials	Claims (Update claim)
Claims - Delete	Serials	Claims

2.3.6 Serial-Hol

Function	Location	
	Tab	Node
HOL record - Retrieve HOL record list	Serials	<ul style="list-style-type: none"> • Items • Items List HOL Links tab
HOL record - Link subscription to HOL	Serials	<ul style="list-style-type: none"> • Items • Items List HOL Links tab
HOL record - Unlink subscription from HOL	Serials	<ul style="list-style-type: none"> • Items • Items List HOL Links tab

2.3.7 Routing

Function	Location	
	Tab	Node
Routing – View Routing Lists	Serials	Routing Lists
Routing - Create Routing list	Serials	Routing Lists (Create and update)
Routing - Display Routing list	Serials	Routing Lists (Lower pane expand information)

Function	Location	
	Tab	Node
Routing - Delete Routing list	Serials	Routing Lists
Routing - Members - Display list	Serials	Routing Lists (lower pane Member List tab)
Routing - Member - Modify (display)	Serials	Routing Lists (View list in lower pane Member List tab)
Routing - Member - Modify (update)	Serials	Routing Lists (update in lower pane Member List tab)
Routing - Member - Delete	Serials	Routing Lists (delete in lower pane Member List tab)
Routing - Print route list members	Serials	Routing Lists (upper pane)
Utilities - Return routed issue	Utilities\Return Item from Routing Group menu option	
Utilities - Remove user from all Routing Lists	Utilities\Remove User from Routing Groups menu option	

2.3.8 Serials Statistics Services

Service Name	Service Description
serial-06	Print arrived issues
serial-09	Issues Arrival Statistics by Sublibrary
serial-16	Serial Titles + No of Issues Received

2.3.9 Routing Services

Service Name	Service Description
serial-07	User's routing lists
serial-08	Routing letter

2.3.10 Pattern Services

Service Name	Service Description
serial-12	Check Serial patterns

2.3.11 Subscription Services

Service Name	Service Description
serial-13	Open Expected Issues

2.3.12 Claim Services

Service Name	Service Description
serial-44	Print claim letters

2.3.13 Management Serials Services

Service Name	Service Description
serial-51	Export 85x Records
serial-52	Import 85x Records
serial-53	Merge/Deduplicate Serial Pattern Files

2.4 Cataloging Module

2.4.1 Cataloging Record

Function	Location	
	Tab	Node
Local cataloging functions	Records	Create HOL in HOL Records tab in lower pane
Retrieve and view record	Records	View a record
Send record to server	'Save on Server' option	
Send record to remote server	Records	Remote menu
Delete record on server	Edit Text\Delete Record from Server menu option	
Total delete (BIB and all its related)	Record Manager\Total Delete menu option	
Low-List		
Item-Show	Show items in Navigation Pane tree	

2.4.2 Catalog Management

Function	Location	
	Tab	Node
Local cataloging functions	Edit Actions\Hanja Hangul Conversion menu	

2.4.3 Catalog Overview Tree

Function	Location	
	Tab	Node
View list of Holding Records	Records	HOL Records tab in lower pane
Overview Tree - Move (set in BIB)	Records	When in Overview Tree mode
Overview Tree - Move subscriptions	Records	When in Overview Tree mode
Overview Tree - Move orders	Records	When in Overview Tree mode
Overview Tree - Move items	Records	When in Overview Tree mode
Overview Tree - Move BIB record	Records	When in Overview Tree mode
Overview Tree - Move HOL record	Records	When in Overview Tree mode
Overview Tree - Move ADM record	Records	When in Overview Tree mode

2.4.4 Catalog Headings

Function	Location	
	Tab	Node
Heading - Correction	Search	Browse (Correct Heading button)
Heading - Choose heading for correction	Search	Browse (Correct Display button)
Heading - Correct heading's display text	Search	Browse (Correct button in Correct Heading Display)

Function	Location	
	Tab	Node
		Text dialog)
Heading - Update heading's display text	Search	Browse (Update button in Correct Heading Display Text dialog)

2.4.5 Authorities Services

Service Name	Service Description
auth-03	List unauthorized headings
auth-04	List of headings that have multiple Docs
auth-14	List/delete records with ambiguous headings
manage-434	Authority record selection

2.4.6 Loading Services

Service Name	Service Description
export-01	Export BIB records with Holdings
export-02	Export Holdings retrieved by XPR
file-01	Convert MARC records (Step 1)
file-02	Convert MARC records (Step 2)
file-05	Convert SWETS records
file-08	Modify MARC Record File
file-10	Conversions
file-11	Oracle Loader
file-12	Convert Aleph Seq to MARC
file-13	Load Z300 Data
file-14	Create MAB-AUT Records
file-15	Oracle Loader
file-93	Load OCLC Records
file-94	Produce Report for Loader Logger
file-95	Update Catalog Records
file-97	RLIN Loader
file-99	Load Marcive records
manage-18	Load Catalog Records
manage-20	Load MAB2 authority records
manage-22	Character conversion
manage-24	Load Items
manage-31	Load Authority Records
manage-36	Check input file against database
manage-38	Merge records
manage-39	Pre-process Input File of Records
manage-42	Load ZDB Records
manage-44	Add Subject Information to BIB Records
manage-50	Create Holdings and items using Bibliographic data
manage-180	Parallel Load Catalog records
manage-500	Create Holdings and items using Bibliographic data
FILE-98	Load BNA records

2.4.7 Indexing Services

Service Name	Service Description
manage-01	Rebuild Word Indexes
manage-02	Build Headings Index
manage-05	Build Direct Retrieval Index
manage-07	Create Short Bibliographic Records
manage-15	Delete Unlinked Headings
manage-16	Alphabetize Headings - Setup
manage-17	Alphabetize Long Headings
manage-27	Sort index
manage-32	Build counters for logical bases
manage-35	Update Brief records
manage-40	Update indexes for selected records
manage-91	Update Full Text Index
manage-102	Pre-load BIB headings from AUT database
manage-103	Trigger Z07 Records
manage-105	Update Untraced references

2.4.8 Record Services

Service Name	Service Description
manage-12	Build links between records
manage-13	Delete "CAT" fields
manage-14	Rebuild last-001-number
manage-19	Create/Update Z106 table for "CAT" field
manage-21	Global changes
manage-23	
manage-25	Fix and check catalog records
manage-26	Detect Similar Headings
manage-33	Delete BIB records including ADM/HOL related records
manage-37	Fix catalog records
manage-55	Copy tags to linked records
manage-93	Deletion of COR fields
manage-431	Create merge index
manage-432	Title record selection by tag 010, 453 and 623
manage-433	Match Routine
manage-435	Complete selected records
manage-436	Title record selection by series
manage-437	Report of matched records
com-02	Cont New and Updated Catalog Records
print-11	URL Check

2.4.9 BL Services

Service Name	Service Description
manage-45	Load PALAS Shelfmarks

2.4.10 Union Catalog Services

Service Name	Service Description
union-01	Create Equivalencies Table
union-02	Populate Equivalencies Table
union-03	Convert Records
union-04	Rebuild Record Equivalencies
union-07	Purge identical Records
union-08	Empty Deleted records
union-09	Re-build equivalencies table
union-13	Load Records to Union Catalog
union-14	Build Word Index for Records Loaded Through union-13
union-15	Report updated preferred documents
union-16	Create Suncat-ID for all Documents
union-17	Add Suncat-ID Before Load Converted Records
union-18	Assisted Matching General Report
union-19	Report Document with No Match found Status
union-20	Delete Library

2.4.11 Publishing Services

Service Name	Service Description
publish-04	Initial Publishing Process
publish-05	Delete ALEPH Published Records
publish-06	Create Tar File for ALEPH Published Records

2.5 Circulation Module

2.5.1 Patrons, Global

Function	Location	
	Tab	Node
Patron Record - Display	Patron	Global Patron Information
Patron Record - Update	Patron	Global Patron Information
Patron Record - Picture - Update/Add	Patron	Global Patron Information
Patron Record - Picture - Delete	Patron	Global Patron Information
Patron Record - Delete	Patron	Global Patron Information
Patron Record - prepare for delete	Update Patron Records (cir-77)	Change patron record to status TO-DEL
Addresses - Display	Patron	Address Information
Addresses - Update	Patron	Address Information
Addresses - Delete	Patron	Address Information
IDs - Display list	Patron	Additional IDs
ID - Display	Patron	Additional IDs
ID - Update	Patron	Additional IDs
ID - Delete	Patron	Additional IDs
Patron, Local - Display	Patron	Local Patron Information
Patron, Local - Renew registration	Patron	Local Patron Information
Patron, Local - Update	Patron	Local Patron Information

Function	Location	
	Tab	Node
Patron, Local - Delete	Patron	Local Patron Information
PATRON, Global - Display	<ul style="list-style-type: none"> Patron Return 	<ul style="list-style-type: none"> Local Patron Information Session

2.5.2 Patron Profiles

Function	Location
Display List	Patron Profile List Dialog
Profile - Display	Patron Profile List Dialog
Profile - Update	Patron Profile List Dialog
Profile - Delete	Patron Profile List Dialog

2.5.3 Patrons – Cash

Function	Location	
	Tab	Node
Transaction - Init Cash	New Cash Transaction Dialog	
Transaction - Create new	New Cash Transaction Dialog	
Transaction - Pay	Patron	Cash
Transaction - Waive	Patron	Cash
Transaction - Print	Patron	Cash
Print cash summary	Patron	Cash

2.5.4 Patron Circulation Info

Function	Location	
	Tab	Node
Display List		
View Patron Loan List	Patron	Loans (List of Loans)\Reading Room
View Patron Cash List	Patron	Cash
View Patron Requests Lists	Patron	Hold Requests\Title Req.
View Patron Photocopy Requests Lists	Patron	Photocopy Requests
View Patron ILL Requests List	Patron	ILL Requests
List Patron Booking Requests	Patron	Booking List
Patron Routing list and proxy list	Patron	Routing List\Proxies-Sponsor
Circulation log - View	Patron	Circulation Log
View patron actions summary	Patron	Circulation Summary

2.5.5 Circulation Desk

Function	Location	
	Tab	Node
Global Due Date settings - Update	Loan	Active Due Dates
LOAN	Loan	Session

Function	Location	
	Tab	Node
Loan blocks - Override	Loan	Session (Blocks tab in lower right pane)
RETURN	Return	Session
Return Date Override	Return	Session
PATRON, Global - Display	Return	Session (Patron Information right pane tab)
Patron Direct Queue - Return	Return	Session
Cross Institution Loan	Loan	Session
Main Menu-Circulation-Offline	Circulation\Offline Circulation menu option	
Main Menu-Circulation-In house use	Circulation\In House Use menu option	
Main menu-ALEPH-Options-Loan/Return set	ALEPH\Options\Setup Loan Options and ALEPH\Options\Setup Return Options menu options	
Circulation log - Update	Patron	Circulation Log
Manual transfer of an item	Circulation\Manual Transfer menu option	
Booking request - View	<ul style="list-style-type: none"> • Items • Patron 	Booking List
Patron - Loan - Display details	Patron	Loan
Transaction - View	Patron	Cash

2.5.6 Loan Management

Function	Location	
	Tab	Node
Patron - Loan - Renew	Patron	Loan
Patron - Loan - Change due date	Patron	Loan
Patron - Loan - Claimed Returned	Patron	Loan
Patron - Loan - Delete	Patron	Loan
Item - Lost	Patron	Loan
Item - Recall	<ul style="list-style-type: none"> • Item • Requests-Hold Requests-Create Hold Requests menu option 	For using the online recall option on the hold request form
Item Show - Loan	Item	Loan

2.5.7 Circulation Requests

Function	Location	
	Tab	Node
Hold request - Access	<ul style="list-style-type: none"> • Items • Requests-Hold Requests-Create Hold Requests menu option 	For creating a hold request
Hold request - Create	<ul style="list-style-type: none"> • Items • Requests-Hold Requests-Create Hold Requests menu option 	For creating a hold request

Function	Location	
	Tab	Node
Hold request - Override blocks	<ul style="list-style-type: none"> Items Requests-Hold Requests-Create Hold Requests menu option 	
Hold request - Update	<ul style="list-style-type: none"> Items Patron 	Hold Requests
Hold request - Delete	<ul style="list-style-type: none"> Items Patron Requests\Hold Requests – Delete By Barcode option 	Hold Requests
Hold request - Print	<ul style="list-style-type: none"> Items Requests\Hold Requests – Print options 	Hold Requests
Title Request - Delete	Patron	Title Req.
Title Request - Create	<ul style="list-style-type: none"> Items Requests-Hold Requests-Create Hold Requests menu option 	For creating a hold request
Title Request - Update	Patron	Title Req.
Booking request - Update	<ul style="list-style-type: none"> Items Patron 	Booking List
Booking request - Create	<ul style="list-style-type: none"> Items Requests-Booking Requests-Create Booking Requests menu option 	For creating a bookinh request
Booking request - Override Blocks	<ul style="list-style-type: none"> Items Requests-Booking Requests-Create Booking Requests menu option 	
Booking request - Delete	<ul style="list-style-type: none"> Items Patron 	Booking Requests
Booking Request - Deliver	<ul style="list-style-type: none"> Items Patron 	Booking Requests
Advance Booking - List of slots	<ul style="list-style-type: none"> Items Requests-Hold Requests-Create Hold Requests menu option Requests-Booking Requests-Create Booking Requests menu option 	For creating an advance booking request
Advance Booking - Create	<ul style="list-style-type: none"> Items Requests-Hold Requests-Create Hold Requests menu option Requests-Booking Requests-Create Booking Requests menu option 	For creating an advance booking request
Photocopy request - Create	<ul style="list-style-type: none"> Items Requests-Photocopy Requests-Create Photocopy Requests menu option 	For creating a photocopy request
Photocopy request - Update	<ul style="list-style-type: none"> Items Patron 	Photocopy Requests

Function	Location	
	Tab	Node
Photocopy request - Print	<ul style="list-style-type: none"> Items Requests\Photocopy Requests – Print options 	Photocopy Requests
Photocopy request - Delete	<ul style="list-style-type: none"> Items Patron 	Photocopy Requests

2.5.8 Items Management

Function	Location	
	Tab	Node
ITEMS - List	Items	List of Items
Main Menu-Items-Change item	Items\Change Item Information menu option	
Main Menu-Items-Restore item	Items\Restore Item Information menu option	
Main Menu-Items-Quick catalog	Items\Catalog Record menu option	
Maintenance record - View	Items	Maintenance Record
Maintenance record - Create/Update	Items	Maintenance Record
Maintenance record - Delete	Items	Maintenance Record
Maintenance profile - View	Items	Maintenance Profile
Maintenance profile - Create/Update	Items	Maintenance Profile

2.5.9 Circulation Management

Function	Location	
	Tab	Node
View Opening Hours of Sublibrary Group	Loan	Open Hours
Update Opening Hours of Sublibrary Group	Loan	Open Hours
View Opening Hours of a Depository	Loan	Open Hours
Update Opening Hours of a Depository	Loan	Open Hours
Set Station Identification	Set Workstation Identifier	
Main menu-Requests-Holds-Global delete	Requests\Hold Requests – Delete Multiple Hold Requests option	
Main menu-ALEPH-Dates-Update due dates	ALEPH\Dates\Change Due Dates option	

2.5.10 Course Reading

Function	Location	
	Tab	Node
Course Reading interface		
Course - Catalog Record		
Course - Delete course		
Modify item		

2.5.11 Cash Services

Service Name	Service Description
cash-02	Cash report

Service Name	Service Description
cash-03	Payment report
cash-05	Update transactions to paid
cash-09	Export records (special)
cash-10	Export records
cash-11	Import records
cash-12	Add/Correct VAT

2.5.12 Circulation Desk Services

Service Name	Service Description
cash-06	Patrons in excess of fine limit
cir-04	Loan report
cir-08	Automatic loan renewal
cir-10	Print courtesy notices
cir-13	Recall items on hold
cir-19	Claimed Returned Items Report
cir-37	Circulation Summary Per Patron
cir-50	Print overdue notices
cir-51	Print overdue summaries
cir-52	Print overdue summaries

2.5.13 Management Circ Services

Service Name	Service Description
cir-01	Rebuild Due Dates
cir-21	Circulation Logger Report
cir-25	Build Patron Indexes
cir-78	Circulation Logger Cleanup
cir-83	Automatic Creation of ALEPH Records

2.5.14 Items Management Services

Service Name	Service Description
cir-03	Remote Storage Import
cir-14	Report of items in high demand
cir-15	Report of items in reading room
cir-16	Report of returned lost items
cir-18	Remote Storage Export
cir-20	Remote Storage Request Arrival
cir-36	Maintenance List
cir-80	Report of in transit items

2.5.15 Patron Services

Service Name	Service Description
cir-05	Print patron list
cir-23	Delete patron records

cir-32	Remove Patron IDs
cir-77	Update Patron Records
file-20	Load Patron Records (PLIF)

2.5.16 Requests Services

Service Name	Service Description
cir-06	Print hold shelf report
cir-07	Print hold requests
cir-09	Print reserve item schedule report
cir-11	Report of hold request availability
cir-12	Print call slips
cir-17	Report/Delete expired hold requests
cir-22	Print photocopy requests
cir-24	Campus Hold Requests Router
cir-33	Booking Reminders
cir-34	Report/Delete expired booking requests
cir-35	Risk Analysis Report
cir-60	Open reserve item schedules
cir-61	Delete reserve item schedules
cir-65	Delete advance booking slots
cir-79	Title requests router
cir-240	Campus Hold Requests Router - Cleanup

2.5.17 Circ Statistics Services

Service Name	Service Description
cir-30	General Circulation Statistics
cir-31	Circulation Statistics by Activity Type
cir-81	PDQ reports
cir-82	Institute time report

2.5.18 Course Reading Services

Service Name	Service Description
course-01	Print Course Lists report
course-02	Print pickup list
course-03	CR records linked to inactive course
course-04	CR records not linked to course
course-05	Course not active
course-06	Instructor Summary report

2.6 ILL Module

2.6.1 ILL – Borrowing

Function	Location	
	Tab	Node
Display Borrowing Status Tree	Borrowing	Summary View
Display Borrowing Requests	Borrowing	Borrowing Request List
Delete Borrowing Request	Borrowing	Borrowing Request List
Locate Borrowing Request	Borrowing	Borrowing Request List
Print Borrowing Request	Borrowing	Borrowing Request List
Return Borrowing Request	Borrowing	Borrowing Request List and Bulk Operation\Return
Change Borrowing Request Status	Borrowing	Borrowing Request List
Send Borrowing Request	Borrowing	Borrowing Request List
Update Borrowing Request	Borrowing	Borrowing Request List
Borrowing Response	Borrowing	Borrowing Request List
Copyright	Borrowing	Borrowing Request List
Receive	Borrowing	Borrowing Request List and Bulk Operation\Receive
Request suppliers	Borrowing	Borrowing Request List - Manage suppliers in lower pane Suppliers tab
Borrowing Unfilled	Borrowing	Borrowing Request List - lower pane Suppliers tab Unfilled button
Logger Management	Borrowing	Request Log
Message Management		Borrowing Request List – lower pane Messages tab

2.6.2 ILL – Lending

Function	Location	
	Tab	Node
Display Lending Status Tree	Lending	Summary View
Display Lending Requests	Lending	Lending Request List
Delete Lending Request	Lending	Lending Request List
Locate Lending Request	Lending	Lending Request List
Print Lending Request	Lending	Lending Request List
Change Lending Request Status	Lending	Lending Request List
Ship Lending Request	Lending	Lending Request List and Bulk Operation\Ship
Update Lending Request	Lending	Lending Request List
Lending Response	Lending	Lending Request List and Bulk Operation\Unfilled
Check In	Lending	Lending Request List and Bulk Operation\Checkin
Refer	Lending	Lending Request List
Logger Management	Lending	Request Log
Message Management	Lending	Lending Request List – lower pane Messages tab

2.6.3 ILL – Management

Function	Location	
	Tab	Node
APDU Exceptions	Administration	APDU Exceptions
Roster Management	Administration	Potential Suppliers
Customer ID Management	Administration	Customer ID
Partner Management	Administration	

2.6.4 Borrowing Services

Service Name	Service Description
ill-01	Print new requests
ill-02	Print claims report and claims
ill-03	List of items returned in circulation
ill-05	Send list of requests to British Library
ill-07	ILL request report
ill-08	Static status requests report
ill-10	Send requests to ILL suppliers
ill-11	Patron Request Status Report
ill-12	ILL Hold shelf report
ill-63	Borrowing Library Statistic Report
ill-66	Claim Report and Letters
ill-67	Outstanding Requests of Former Patrons
ill-73	Claim Report and Letters
ill-74	ILL Patron Requests Report
ill-75	Send Requests to the British Library
ill-76	Pickup List report
ill-88	Generate Borrowing History

2.6.5 Lending Services

Service Name	Service Description
ill-50	New incoming ILL requests report
ill-64	Lending Library Statistic Report
ill-65	Lending Library - ILL Requests Report and Slips
ill-68	Lending Library Overdue Handling
ill-69	Lending Library - Expired Messages
ill-89	Generate Lending History

2.6.6 Management ILL Services

Service Name	Service Description
ill-04	Rebuild request index
ill-09	Outstanding requests of former patrons
ill-52	Load Potential Suppliers Default

Service Name	Service Description
ill-61	Copyright Payment Report
ill-62	Copyright Statistics Report
ill-70	Patron Link Removal
ill-72	Archive ILL Requests
ill-77	Synchronize patrons data with ILL partners data

2.7 Common Functions

2.7.1 Overview Tree

Function	Location	
	Tab	Node
View Item information	Overview mode of left pane	Expanded information in right pane if item is selected
View Loan information	Overview mode of left pane	Expanded information in right pane if item is selected
View Order information	Overview mode of left pane	Expanded information in right pane if order is selected
View Subscription information	Overview mode of left pane	Expanded information in right pane if subscription is selected
Mex	Overview mode of left pane	Expanded information in right pane
Item-Show	Overview mode of left pane	View items in navigation tree

2.7.2 Record Triggers

Function	Location	
	Tab	Node
Display List - All triggers	Retrieve triggers between dates: <ul style="list-style-type: none"> • Catalog\Record tab • Circulation ALEPH\Retrieve triggers menu option 	
Display List - Triggers of a record	Items\Orders\Serials	Triggers List
Trigger - Create/Modify	Items\Orders\Serials	Triggers List
Trigger - Display	Items\Orders\Serials	Triggers List
Trigger - Delete	Items\Orders\Serials	Triggers List

2.7.3 Task Manager

All Task Manager views

2.7.4 Configuration Manager

Function	Location
Tables Navigator - Display list	ALEPHADM – Tables Navigator
Tables Navigator - Get table/file	ALEPHADM – Tables Navigator
Tables Navigator - Check-in table/file	ALEPHADM – Tables Navigator
Tables Navigator - Lock/Unlock table	ALEPHADM – Tables Navigator
Tables Navigator - ALEPH_ERRORS list	ALEPHADM – Errors Table Dictionary
Language - Error dictionary - Display	ALEPHADM – Errors Table Dictionary
Language - Error dictionary - Save	ALEPHADM – Errors Table Dictionary
History - View list	‘Show History’ options in Tables Navigator
History - View previous version	‘Show History’ options in Tables Navigator
History - Restore previous version	‘Show History’ options in Tables Navigator
History - Activate/Deactivate	‘Show History’ options in Tables Navigator

Function	Location
History - Purge files	'Show History' options in Tables Navigator
History - Clear files	Tables Navigator - "Clear" button in 'Show Log'
Error messages - save new text	

2.7.5 Staff Privileges (Passwords)

Function	Location
User list - Display	Staff Privileges dialog box
User - Duplicate	Staff Privileges dialog box
User - Update	Staff Privileges dialog box
Access rights - Display	Modify Access Rights dialog box
Access rights - Update	Modify Access Rights dialog box
Access rights - Delete	Modify Access Rights dialog box
Password - Change	Change Current Password option in right side lower pane menu.

2.7.6 Z39.50 users

Z39.50 search users – Update via Z39.50

2.7.7 SIP2

SIP2 login

2.7.8 XSL Generator

Update XSL print template on server

2.7.9 Union Catalog Management

Access Union Catalog Management Interface

2.7.10 Utilities Interface

Access Utilities Interface

2.7.11 Services Interface

Services Menu Interface

2.7.12 Reports Services

Service Name	Service Description
com-01	Print trigger report
manage-70	Record Keys Conversion
sys-90	Batch jobs summary report

2.7.13 DB Services

Service Name	Service Description
file-03	Export Oracle database
file-04	Import Oracle DB (without checks)
file-06	Import Oracle DB (with checks)
file-09	Check for Duplicate Keys
manage-06	Count Database Table
manage-08	Organize Database Tables
manage-11	Check Database Tables
manage-92	Remove Library

2.7.14 ADM Indexing Services

Service Name	Service Description
manage-64	Create Filing Keys for Names
manage-111	Build word indexes for ADM records

2.7.15 Printing Services

Service Name	Service Description
print-01	Custom format
print-03	Export document records
print-04	Catalogs
print-05	Full Catalog
print-08	Column format
print-09	Print Bibliography
print-10	Print Index for Bibliography
print-20	Format Print
print-50	Sort Printouts
ret-05	Marc XML

2.7.16 Search Services

Service Name	Service Description
ret-01	Document record fields
ret-02	Filter Items
ret-03	Retrieve records using CCL
ret-04	Retrieve Catalog records by Date
ret-10	Cross Files
ret-21	Sort retrieved records

2.7.17 SDI Services

Service Name	Service Description
sdi-01	Run SDI
sdi-02	SDI User Notification
sdi-03	Delete Expired SDI Requests

Service Name	Service Description
sdi-04	SDI User Broadcast

2.7.18 Server Jobs Services

Service Name	Service Description
sys-01	start servers
sys-02	build Print Templates Package
sys-03	build Cataloging Tables Package

2.7.19 Staff Services

Service Name	Service Description
staff-01	Staff Privileges Report
staff-02	Staff Users Report

2.7.20 X-SERVER Interface

Service Name	Service Description
main	X-SERVER Interface
bor-auth	Borrower - Authentication
bor-by-key	Borrower - Retrieve by Key
bor-course	Borrower - Course Info
bor-info	Borrower - Information
circ-status	Circulation status
get-holding	Holdings Info
hold-req	Hold request - Create
hold-req-cancel	Hold request - Cancel
log-off-id	Log Off
ill-in-loc	ILL - Locate
ill-in-loc-previ	ILL - Locate Preview
item-data	Item Data
renew	Renew Loan
renew-all	Renew All Loans for patron
get-sort-codes	Format tab_sort table to xml
sort-set	Sort set of documents
update-bor	Update Patron details
update-doc	Update Document
verde-get-order	VERDE - Get Order
verde-upd-order	VERDE - Update Order Status
verde-open-order	VERDE - Open new Order
user-auth	Staff Authentication

3 Staff Services

The following new services enable the production of staff user related reports:

- **Staff Privileges Report (staff-01)** – This service produces a report of staff users and their privileges according to various filters that may be placed on both which staff users will be retrieved and on what staff privileges will be reported.
- **Staff Users Report (staff-02)** – This service produces a report of staff users according to various filters. The filters may be placed on staff user information or on the privileges that the user has.