Staff User's Guide – Web OPAC

Version 22

The bridge to knowledge

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1 Web OPAC Overview

The Web OPAC is an interface for accessing an ALEPH 500 online catalog via the HTTP Internet standard. The Web OPAC allows patrons to enter the system as a guest user or to sign in, which activates their customized profiles. Patrons can also customize their session, for example, by selecting default sort or display options.

The Web OPAC is a search tool that is both powerful and easy-to-use. All access points are defined by the library. ALEPH 500 supports a virtually unlimited number of browse and search indexes and has many features to help patrons navigate the large result sets that are generated in research libraries and consortia. Result sets are displayed in a default sort order defined by the library, but the system allows for other sort options, which the patron can activate as necessary. Patrons can have records sorted by relevancy; can limit result sets by date range, language, and other filters; can use various operators to combine sets; and can select or deselect items in a set to form a subset when appropriate.

Via the Web OPAC, patrons can check their fines, loans, and reserves. They can request materials through hold requests, document delivery, and inter-library loan functions. Patrons can view their current loans and renew materials subject to the library's circulation policies. As ALEPH 500 supports MARC-based linking fields, electronic and Internet resources are readily accessible. Libraries all around the world can be quickly and effectively searched through the Z39.50 gateway.

The Web OPAC user can change the interface language at the click of a button. Thereafter, all menus, help screens, and messages will be displayed in the selected language until the patron logs out or the session times out or is reset.

Data in ALEPH 500 is stored in Unicode, which means that records can be displayed in any language supported by the Unicode character set.

1.1 Notes on Terminology in the Web OPAC Chapters in the ALEPH User Guide

The Web OPAC can be accessed by any user from a library terminal or from a PC with a Web browser, whereas access to the other ALEPH 500 modules is restricted to authorized librarians. This distinction is reflected in the style of the text in the Web OPAC chapters which is significantly different from the rest of the ALEPH 500 User Guide in two ways:

Use of the third person to refer to the end user.

Use of different terms to refer to the individual using the Web OPAC.

These differences are discussed in the rest of this section.

1.1.1 Second Person Versus Third Person

In general, the ALEPH User Guide is written in the second person, as it is assumed that the reader is a librarian who is an end user of the ALEPH 500 system. For example, in the Circulation section of the User Guide, the following is written:

Enter the item barcode. You can use the barcode reader to scan in the number. Then click OK. The following 2-part form is displayed...

However, in the case of the Web OPAC section of the ALEPH User Guide, with the exception of the System Librarian chapter, it is assumed that the reader is not necessarily an end user. The assumed reader is a librarian who wants to become familiar with the functions that are available to the different types of users who access the Web OPAC. Accordingly, the third person is used when referring to the Web OPAC user. For example,

From the Basket, the patron clicks the Save/Mail button. The Mail / Print Basket form appears.

The patron fills in the relevant details, including the destination e-mail address, and clicks Go. The patron can also add a textual note (of up to 300 characters) to be included in the e-mail message.

In the case of the System Librarian chapter, it is assumed that the reader is a System Librarian who is responsible for customizing the Web OPAC. Accordingly, the second person is used. For example:

You can determine which IP addresses (that is, which workstations) may access the Web OPAC. To do so, edit the server_ip_allowed table located in the $alephe/tab directory. An example from that table is given below...

1.1.2 User Versus Patron

In the Web OPAC section of the ALEPH User Guide, the one using the Web OPAC is sometimes referred to as a user and sometimes as a patron. A patron has a library patron ID and information about his library activities is stored in library records. The choice of term used depends on the following:

Has the user identified himself as a library patron by signing in?

Are the functions described available to all Web OPAC users or just to library patrons?

1.2 Basic Web OPAC Functions

The user can use the Web OPAC to:

Search the database for bibliographic records.

View holdings information about items, for example, the location of each copy (that is, branch and shelf number).

View circulation information such as how long the item can be borrowed and whether or not the item is out on loan.

Place hold and photocopy requests for items and renew loans (if he is a library patron with appropriate privileges).

Search external databases.

1.3 Search Functions

Two types of searches are available in the Web OPAC:

Browse

The user can browse an alphabetical list of headings, such as titles, authors and subjects (see Browse on page 18). The alphabetical list leads to bibliographic records.

Search

The user can retrieve records from the database using Word, Phrase or Direct Indexes (see Search on page 21).

1.4 Indexes

To support the search functions, the system librarian defines the indexes available to the user in Web OPAC. There are three kinds of indexes:

Headings or Browse Indexes

Headings are whole phrases from the bibliographic record, such as author, title, subject, and so on. An entire field or a specific subfield can be a Headings Index term.

Word Indexes

Word Indexes are lists of words taken from specific fields of a bibliographic record. Following are examples of word indexes:

Words from authors (tags 100, 110...)

Words from titles (tags 240, 241, 242, 243, 245...)

Words from subjects (tags 600, 650)

Words from all fields

Direct Indexes

Direct indexes enable the user to retrieve a specific record. Following are examples of Direct Indexes:

Bibliographic record number

ISBN/ISSN

Call numbers

Barcode number

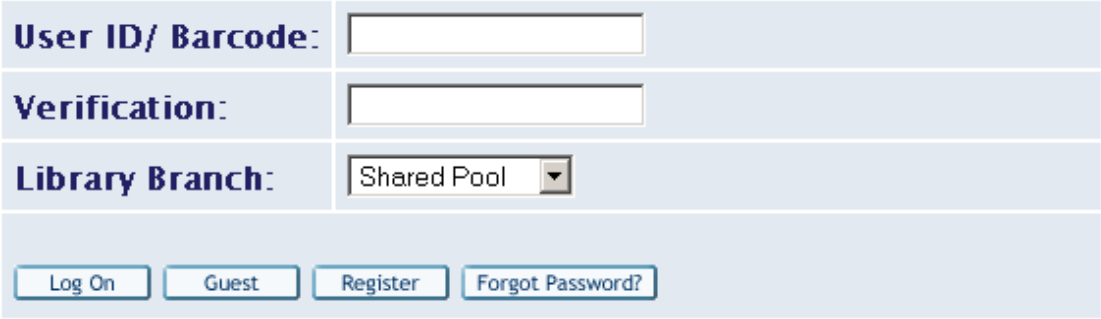
2 Getting Started

When a user accesses the Web OPAC, he is assigned a default patron profile (for example, ALEPH) defined by the System Librarian. The default patron profile sets default preferences for display, language, database, home library, and privileges.

A user "identifies" himself by signing in. Sign-in is optional in the Web OPAC, but required for certain patron-related actions (request, renew, view list of loans, and so on). "Identification" also activates the user's patron profile (if he has been assigned a profile in the global patron record). All Web OPAC users can set preferences for the session, overriding the default patron profile (see Preferences on page 16). A patron can save his preferences for later sessions.

2.1 Sign-in

The first Web OPAC screen that the user encounters is the Sign-In screen:



There are four options available from the Sign-In screen:

Login

Guest

Register

Forgot Password?

Login

A patron enters his Patron ID and Password, chooses an administrative library, and clicks **Login** to be admitted to ALEPH. Instead of manually entering the ID and Password, the system can also be set up to accept a barcode and verification number or other additional options which the library can define.

A patron can perform catalog searches, place hold requests, view the circulation record, use the e-shelf and History options.

Guest

A user who enters as a Guest can only perform catalog searches, browse, print search results, and send search results by e-mail.

A user enters as a Guest by clicking **Guest** and choosing an administrative library without filling in the Patron ID and Password fields.

Register

A library can enable users to register as patrons for the first time. When a user clicks Register, a New Patron Registration Form appears:

New Borrower Registration Form

* Mandatory fields

Name:	*	
ID:		
Library Branch:	*	
Enter Pincode:		
Verify Pincode:		
Language		ENG

Personal details (only for first registration)

Address:	*	
Zip Code:		
E-mail Address:		
Telephone (1):	*	
Telephone (2):		
SMS Number		
Receive SMS		☐
Address Type:		Permanent Address
Address valid from:		20120823 (yyyymmdd)
Address valid to:		20130223 (yyyymmdd)
Gender:		
Place of Birth:		
Birth Date:		00000000 (yyyymmdd)
Export consent:		☐
Mail Attachment:		

If you forgot your password, you can use the "Password Bypass" mechanism by selecting one of the questions and answering it.

Question Database:	Your eye color	

Go Clear

The user should enter as much information as possible, and must at least fill in the mandatory fields. The user should take note of his ID number, and PIN code. After the user has completed the form and clicked Register, the system sets up a new patron record for him. The user is assigned basic default patron privileges as set by the library. The user must apply to the library in person in order to add to his patron privileges.

If the user registers without filling in a date in the "Address valid to" field, the date is taken from the value of setenv `www_bor_registration_ends`.

Forgot Password?

Forgot Password? - This function allows a patron to recover a password if he forgets it. This function is accessed by clicking Forgot Password? in the Sign-In window. The patron is asked to choose a question he saved earlier, and to answer it.

This function is also available from the Register screen.

A user can perform catalog searches and send results by e-mail without first identifying himself.

However, a patron must sign in if he wants to place a request for material. If the patron has not signed in before activating his request, he is prompted to identify himself.

In addition, if a patron has a pre-defined profile in his Patron record (either group or personal), his language and display preferences are activated if he signs in (see Personal Profile on page 65 in the My Library Card chapter and in the Circulation module, Patron Profiles).

To sign in, from the Sign-In window, the patron:

Types in his Patron ID number, then his PIN code in the Verification box, and clicks **OK**, or

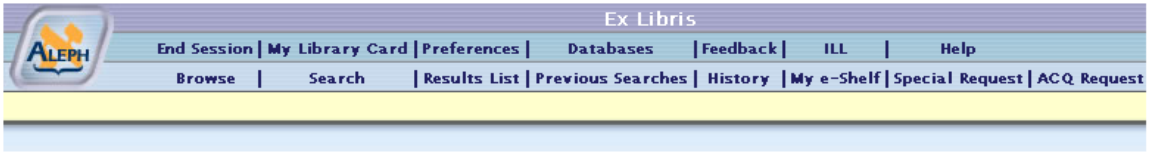
Types in his Barcode and then his verification number in the Verification box and then clicks **OK**.

If the entries match, the patron is signed in and the Search screen appears.

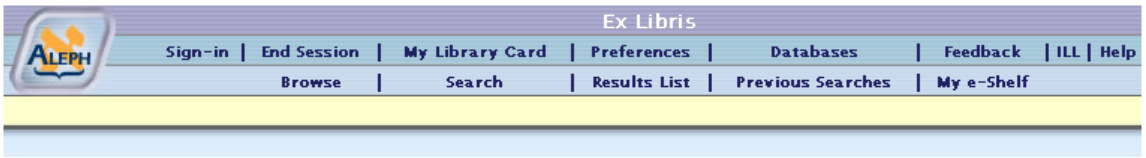
If your system is set to display the Patron Notification screen, it might be displayed before the Search screen. The patron notifications screen appears if the patron has delinquencies, unpaid cash transactions, overdue loans or a user's account that are about to expire.

2.2 Menu Bar

The menu bar appears at the top of the Web OPAC screen. The options shown on the menu bar vary according to whether or not the user has signed in. When a user has completed sign-in, (if he has all display permissions) the display of the menu bar is as follows:



If the user has not signed in, several options are unavailable and the menu bar looks like this:



The options available from the menu bar are explained briefly in the following section:

Sign-in

Displays the Sign-in screen to a user who has entered as a Guest.

End Session

Ends a user session. This nullifies the user sign-in and automatically deletes the session history.

My Library Card

Displays patron administrative information, such as loans, cash transactions, requests, blocks, personal details, and display preferences (see My Library Card on page 57).

Preferences

Lets the user determine the way the system shows him a list of records, language interfaces, and language records (see Preferences on page 16).

Databases

Displays a list of databases for the user to choose from. Note that the library determines which databases are available to the user.

Feedback

Lets the user send feedback about the ALEPH Web OPAC to the library administration.

ILL Request

Lets an authorized patron request material from another library (see ILL (Interlibrary Loan) on page 68).

Help

Displays brief information about the Web OPAC interface.

Browse

Enables the user to scroll through an alphabetic or alphanumeric index.

Returns the user to his last Browse operation.

(see Browse on page 18)

Search

Lets the user find records by entering keywords or phrases (see Search on page 21).

Results List

Returns the user to the search results of a previous Search. (see Results List on page 31).

Previous Searches

Displays Search History of all previous searches in the current session (see Previous Searches on page 42).

History

Displays Search History of all saved searches present in the patron record (see History on page 83).

My e-Shelf

Displays list of all BIB records which have been saved by a guest during the current session and by a patron during the current and previous sessions.

Special Request

Lets the patron place special requests for items that are not found in the Web OPAC, but are listed in the card catalog (see Special Request on page 70).

2.2.1 Message Bar

The message bar appears underneath the menu bar. The message bar contains online information, instructions or warnings that inform the user about Web OPAC or about conditions that may require special consideration. There are two types of messages:

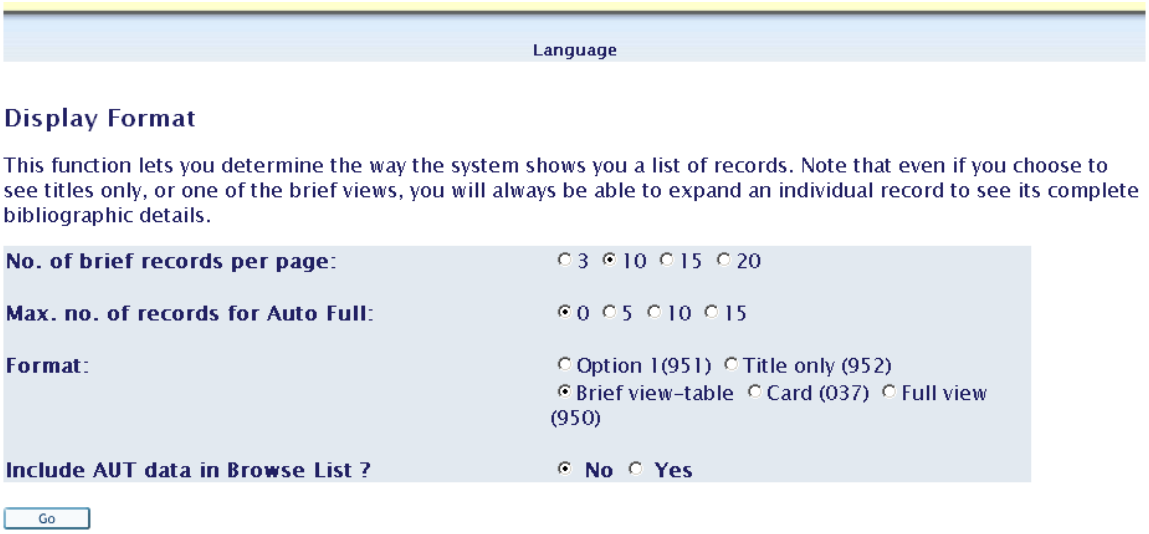
Information - provides information about the results of a command. The user is not offered a choice. For example:

Warning - informs the user about a situation that may require an intervention or correction before work can continue. For example:

2.2.2 Preferences

ALEPH lets the user set preferences for the display of information in the Web OPAC, such as interface language, thesaurus language. The user can also determine the format in which records are presented. Preferences can also be set in a patron's Personal Profile (see Personal Profile on page 65 in the My Library Card chapter).

The user sets his preferences by clicking Preferences from the menu bar. The Display Format window appears:



If the user has been assigned a personal patron profile, he can save his preferences.

2.2.3 Display

The Display Format window offers a number of options:

Records per page

This lets the user set the number of records he wants to appear per page.

Max no. of records for Auto Full

The system automatically displays records in full view, if the number of records in the set does not exceed or equal the number the user sets here.

Format

Lets the user choose pre-defined format preferences.

Include AUT data in Browse List

If Yes is selected, the Browse List displays links to Authority records related to headings.

Update Personal Profile

This option only appears if a patron is signed in (and has a personal patron profile). If Yes is selected, changes made to the patron's display preferences are updated in his ADM record.

2.2.4 Language

To set the user's preferred language, from the Display format window, the user selects Language. The Language Preferences window is displayed.

The Language Preferences window offers the following options:

Language of interface

Lets the user set his preferred language for the interface by marking the appropriate box and clicking **OK**.

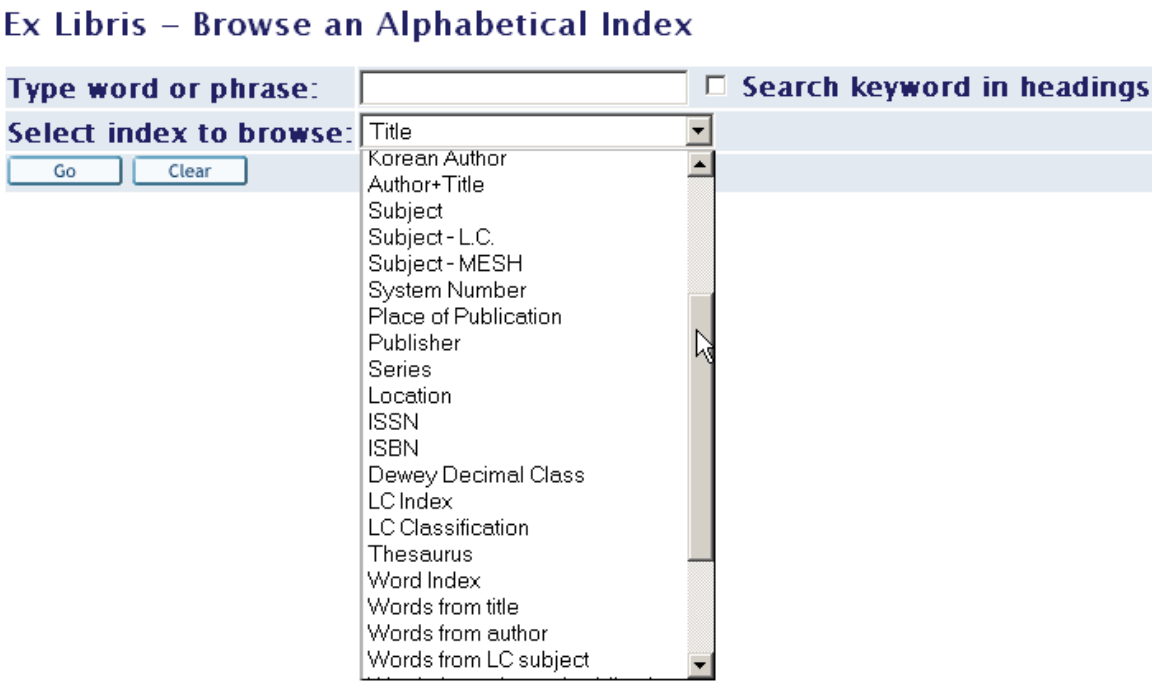
Language of records

Lets the user set his preferred language for records by marking the appropriate box and clicking OK.

3 Browse

Browse enables the user to search through an alphabetical list of phrases (for example, title, author, subject, and so on) from various records such as bibliographic records, authority records and so on. Browse facilitates the user's search by means of the Headings Indexes, Word Indexes and Direct Indexes (see Indexes section, Overview chapter).

To search by using Browse, from the menu bar, click Browse. The Browse an Alphabetical Index window is displayed:



3.1 Browse Query

The user submits Browse queries from the Browse an Alphabetical Index window.

To submit a Browse query:

In the Browse an Alphabetical Index window, the user types the word or phrase that he is looking for. This must be the initial text of the heading.

The user selects an index and clicks Go. A Browse list is displayed (shown below).

If your system is set to enable Keyword Searching in the heading list, a checkbox is displayed next to the "Type word or phrase" field. The checkbox is labeled "Search Keyword in heading". Selecting "Search Keyword in heading" enables users to perform a keyword search in heading list. For more details regarding keyword

searching in headings, refer to the Search Keyword in Headings section of the Aleph 20.01 System Librarian's Guide - Web OPAC.

3.2 Browse List

A Browse list is comprised of an alphabetical list of headings for the user to browse through. The text the user types in when submitting his Browse query appears in the first or second line if there is a match. If there is no match, the list will appear either with the immediately preceding and succeeding headings in the first two lines, or with the succeeding heading in the first line. The manner of display depends on library setup. The number of documents associated with each heading is shown.

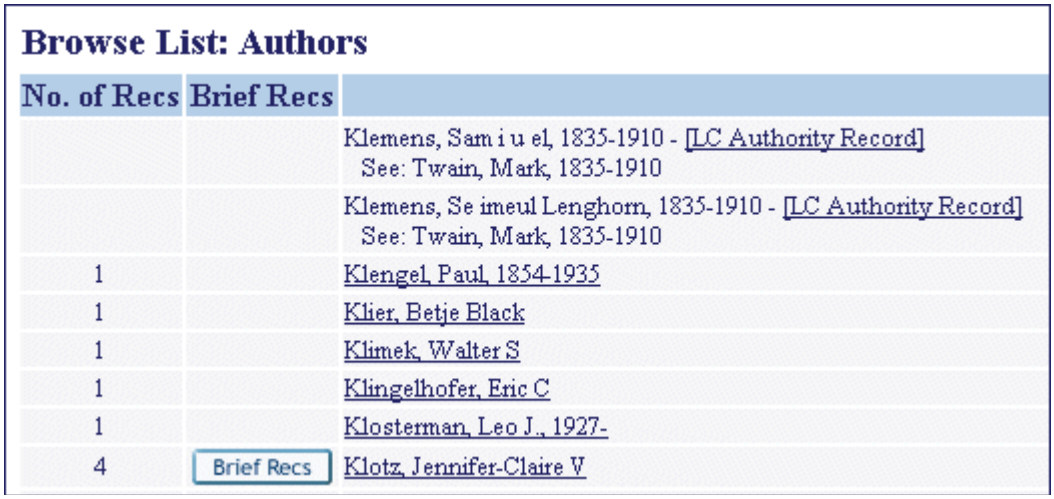
The user can reach the Browse List window in three ways:

From the Browse an Alphabetical Index window (see Browse Query on page 18).

When viewing a record from Full View, click an underlined field name to receive a window listing the services available for the field. The user can choose to browse a headings list.

When viewing a list of cross-references. To see a Browse List, the user clicks an underlined field name. For example, clicking the Heading tag displays an alphabetical list of entries with the current heading at the top of the list.

The Browse list displays headings. If there is an Authority Record related to a particular heading, the system will display a link to it.



Browse List: Authors

No. of Recs	Brief Recs	
		Klemens, Sam i u el, 1835-1910 - [LC Authority Record] See: Twain, Mark, 1835-1910
		Klemens, Se imeul Lenghorn, 1835-1910 - [LC Authority Record] See: Twain, Mark, 1835-1910
1		Klengel, Paul, 1854-1935
1		Klier, Betje Black
1		Klimek, Walter S
1		Klingelhofer, Eric C
1		Klosterman, Leo J., 1927-
4	Brief Recs	Klotz, Jennifer-Claire V

To view an Authority Record, the user clicks the Authority Record link. The Authority Record, including Cross-references, appears.

Cross-references - Authors - Klemens, Se imeul Lenghorn, 1835-1910

Click on an underlined tag to see a Browse List.

Sys. no.	000002069
Heading	Twain, Mark,1835-1910
Seen from	Clemens, Samuel Langhorne, 1835-1910
Seen from	Klemens, Sam i u el, 1835-1910
Seen from	Klemens, Se imeul Lenghorn, 1835-1910
Seen from	K o-lan-man-ssu, Sai-mi-erh Lang-en, 1835-1910
Name Complex SA Ref	Works by this author are usually entered under Twain, Mark, 1835-1910. For a listing of other names used by this author, search also underTwain, Mark, 1835-1910
Update Flag	Y

Close

Brief Records Display (Sorted Index)

In a Browse list (list of headings), the user can click a Brief Recs button to retrieve a pre-arranged list of works related to the heading. Note that the Brief Recs button is active only if the highlighted heading has related brief records:

Browse List: Authors/Names

No. of Recs	Brief Recs	Entry
50+	Brief Recs	Proust, Marcel, 1871-1922

Each entry in the brief list displays information from the cataloging record that describes the work:

Proust, Marcel, 1871-1922

Records 11 - 20 of 44 Jump to Text

#	Doc No.	Entry
11	3312	A la recherche du temps perdu. 1933.
12	3313	A la recherche du temps perdu. 1987.
13	3322	A la recherche du temps perdu. 1994.
14	3318	A la recherche du temps perdu. English. 1992.
15	3325	A la recherche du temps perdu. Hebrew. 1981.
16	3844	A la recherche du temps perdu. Hebrew. 1999.
17	3320	A la recherche du temps perdu. Italian. 1981.
18	3321	A la recherche du temps perdu. Persian. 1370.
19	3323	A la recherche du temps perdu. Spanish. 1966.
20	3324	A la recherche du temps perdu. Swedish. 1993.

The content of the entry determines its arrangement and differs from list to list, depending on the type of heading to which it is related. For example, a list of works related to a series heading is arranged by and displays the volume number; a list of works related to a prolific author is arranged by and displays the uniform title. The list might include cross-references from work to work in the list (for example, a translated title can be listed as a cross-reference to the uniform title).

The Authority record related to the heading might be displayed at the head of the list. Within the list, the user can browse by clicking Next Page or Previous Page. The user can also jump to a particular entry in the list by entering its initial text in the "Jump to Text" box and clicking the "Jump to Text" button.

Note: Initial definite and indefinite articles ("a", "the", and so on) must be omitted.

4 Search

To activate Search, click **Search** on the menu bar.

Search lets the user retrieve relevant records from the database by keywords. The Web OPAC searches Word Indexes (such as Words in Title, Words in Subject, and so on) for records containing the keywords entered. The Web OPAC also searches Direct Indexes for records classified by unique identifiers such as System Number, Barcode, ISBN, and so on.

There are five different Search types available in Web OPAC: Basic; Multi-base; Multi-field; CCL; and Advanced Search. To choose a particular type of Search, the user clicks the relevant link from the Search window:

The different Search types are explained in the rest of this chapter.

A Search request is limited to the number of records set by the System Librarian (for example, 5000). In addition, the limit for the default result display and for a sort in the results list window is 1000.

A Search query is limited to eight Logical (Boolean) operators and/or 500 characters in length.

A truncated Search is limited to the number of different terms matching the truncation defined by the System Librarian. The default is 2000.

4.1 Logical Operators

ALEPH supports "and", "or", and "not" Boolean operators. "and" is assumed if no operator is present. Operators can be typed in English or expressed by using any of the following conventions:

AND = + (plus sign)

AND = & (ampersand)

OR = | (pipe sign)

NOT = ~ (tilde)

When entering keywords, the user can use truncation, masking and logical operators, as explained below.

4.1.1 Truncation

The user can type a portion of a word and add the *?* character or the * character at the beginning (or end). This indicates that the user wants all words that begin (or end) with that portion of the word.

For example:

?ology

retrieves all records containing words ending with *ology* in an indexed field, such as *anthropology*, *archaeology*, *psychology*, and so on.

Chloro?

Retrieves all records containing words beginning with *chloro* in an indexed field.

The *?* character can also be used to find variant spellings. For example, *alumin?m* finds both the American spelling, *aluminum*, and the British spelling, *aluminium*.

The user cannot use the truncation symbol both at the beginning and at the end; for example, *?dva?* is not valid.

? or * are placeholders for any number of characters.

For example:

ps?ic

Retrieves all records containing words beginning with ps and ending with ic in an indexed field, such as *psychic* and *psychotic*.

4.1.2 Logical (Boolean) Operators

The user can narrow or broaden a search by using the logical (Boolean) operators AND, OR, and NOT. The user can use these operators in a search string.

For example:

government and labo?r

Retrieves all records containing *government* and (*labor* or *labour*).

government or cabinet

Retrieves all records containing either *government* or *cabinet*.

government not parliament

Retrieves all records containing the word *government* but not including the word *parliament*.

4.1.3 Parentheses

Parentheses must be used in a retrieval request, when required for correct query syntax.

For example:

wti = (strategy or tactics) and wau = (dunnigan and churchill)

4.1.4 Proximity Operators

england %3 ballads

The *%* symbol, followed by a number, can be placed between two words. This indicates that the user wants the words to appear within a particular distance from each other, without regard to the order in which the words appear. For example, *england %3 ballads* retrieves *Ballads of England, England and Her Ballads,* and *Ballads of Merry Old England*.

ballads !3 england

The *!* character, followed by a number, can be placed between two words. This indicates that the user wants the words to appear within a particular distance from each other, and in the same order in which he types the words. In this case, *ballads !3 england* retrieves *Ballads of England* and *Ballads of Merry Olde England* but not *England and Her Ballads*.

4.1.5 From - To

1993 -> 1996

The -> (hyphen and greater than) symbols can be placed between two words. This indicates that the user wants to retrieve records that have words from (and including) the first word, through the second word. This search is particularly helpful for limiting a set of records by year of publication. The symbols must be used; that is, the user cannot use "to" instead of the symbols.

4.1.6 Phrase Searches

"Olympic Games"

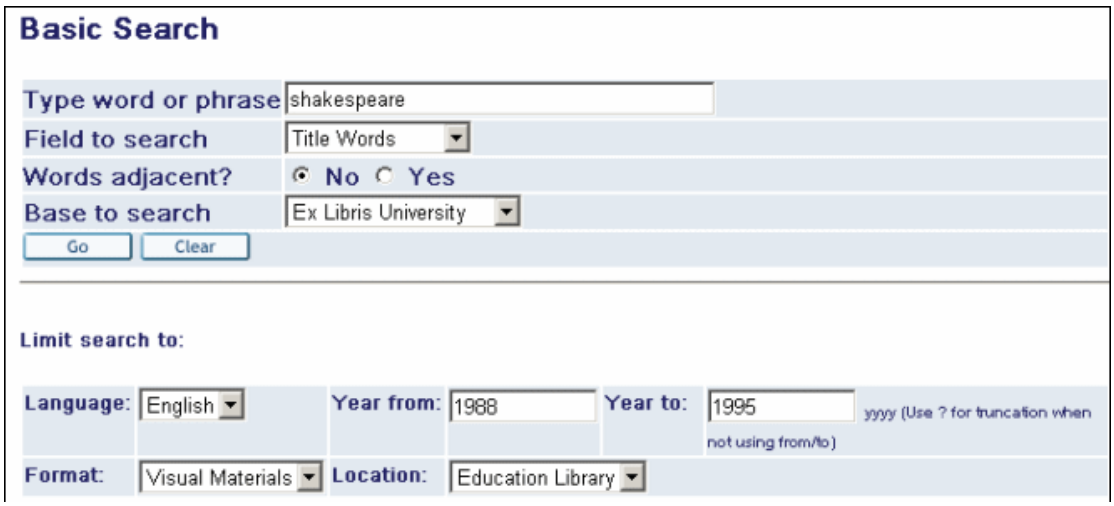
Search strings wrapped in double quotes are treated as phrase searches. A phrase search acts in the same manner as a words search with the adjacency operator set to Yes. For example, to find information on the Olympic Games, enter: *"olympic games" information*.

Note that words are highlighted in the resulting record display, but phrases are not.

It is possible to search by using only the search filters, without a search term. This can be done by using the pseudo search term “alldocuments”. To search for a phrase which includes the word “and”, “or”, or other operators as regular words, surround the whole phrase with quotation marks.

4.2 Basic Search

The Basic Search window looks like this:



The user chooses a field to be searched (that is, the Word Index or Direct Index to be searched, such as Author, Subject, Publication Year, System Number) and types in the keywords he is looking for. The user can also choose in which base the search will be made. The default base is always the current base.

Lowercase letters can also find matches of capitalized words. The user can use the Boolean operators AND, OR, and NOT in his search string. AND between words is implied. The Web OPAC also accepts AND/OR/NOT as real words (that is, not as Boolean operators) when they are part of a phrase, as in, for example, *TIT=gone but NOT forgotten* , or if the operator is enclosed in double quotes, as in, for example *WTI=gone but "NOT" forgotten* (NOT is written in uppercase for the sake of clarity - it can be lowercase in the search query).

Note: The Web OPAC also accepts the slash mark (/) in search strings.

4.2.1 Words adjacent?

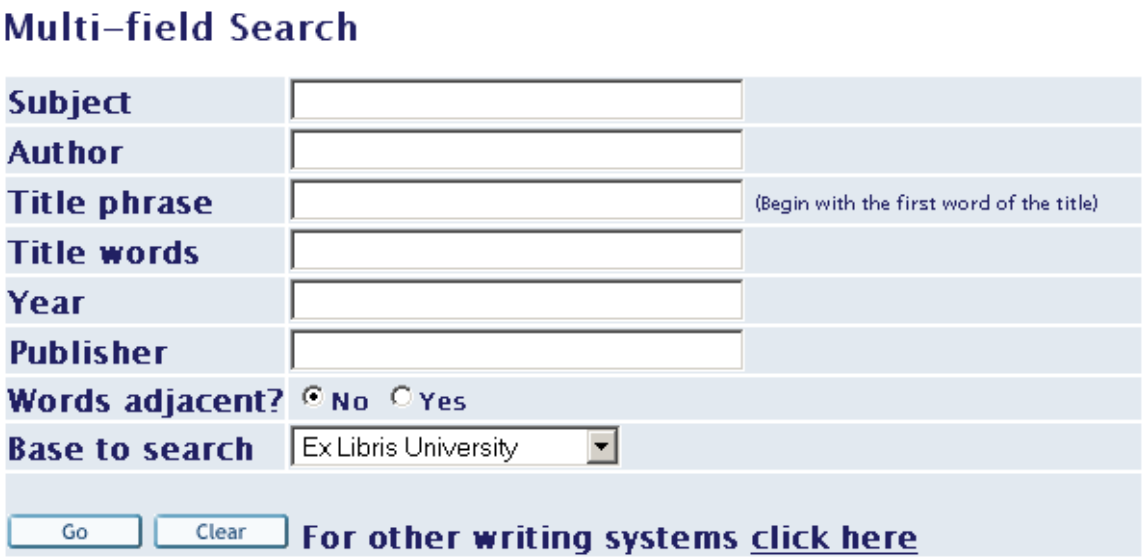
The user can choose Yes for "Words adjacent?". The Web OPAC recognizes that the user wants only records that contain the query terms one after the other.

4.3 Multi-field Search

The Multi-Field Search lets the user search more than one word group at the same time, with "AND" between them.

4.3.1 Using Multi-field Search

From any Search window, the user clicks Multi-field. The Multi-field Search form appears:



The user must fill in as many fields as he can. The more lines filled in, the narrower the search.

The user can also choose in which base the search will be made. The default base is always the current base.

When the user clicks **Go**, a Results List appears.

4.4 Search/Browse

The Search/Browse window lets the user search or browse from the same screen.

As search and browse options exist on the same page simultaneously, if the user chooses to perform a search, all the special character functionality will be available. If the user chooses to browse, the Words Adjacent option will be irrelevant.

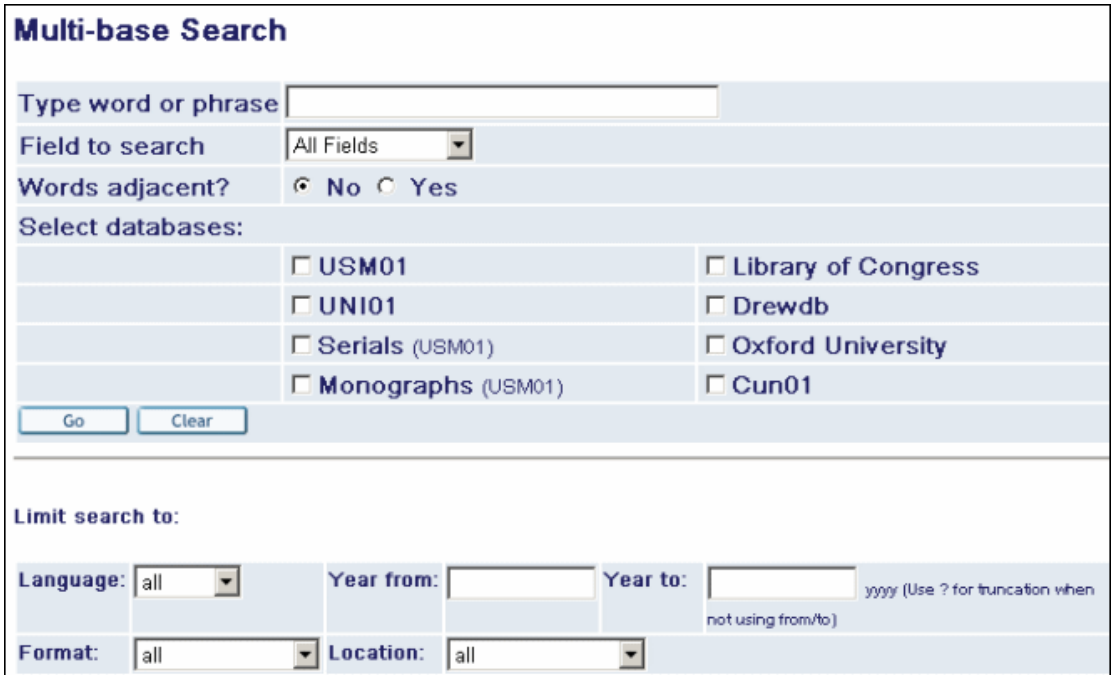
Whether or not this screen is available depends on the library setup.

4.5 Multi-base Search

A Multiple base (or Multi-base) search query retrieves a set of records in selected databases matching specific criteria. The user can use the Multi-base Search to search more than one database at a time.

4.5.1 Using Multi-base Search:

From any Search window, the user clicks Multi-base. The Multi-base Search form appears (see below).



The user selects the fields he wants to search using the pull-down menus.

The user types in the required keywords.

The user selects the databases he requires by checking the adjacent boxes. When he clicks **Go** the Multi-Base search results page displays. This page contains the list of the searched databases with the number of records retrieved per database. The user can click the database link in order to view the results of the search in this particular base.

4.6 CCL - Common Command Language

4.6.1 Using CCL

The user can use CCL - Common Command Language to search for words and headings in several different indexes at once. The user must specify the code of the word and the heading indexes to be searched.

The following are the most common abbreviations used in the ALEPH command language.

WRD - Words

WTI - Words in title field

WAU - Words in author field

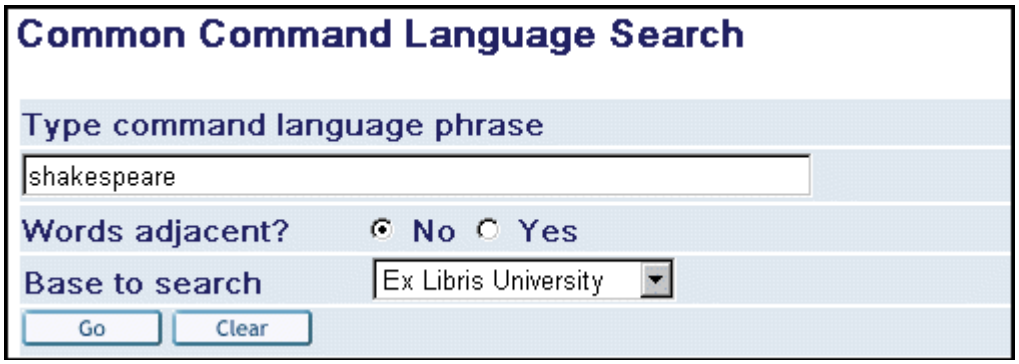
WPU - Words in publisher field

WSU - Words in subject field

WYR - Year of publication

Example of CCL Search:

From any Search window, the user clicks **CCL**. The CCL Search form appears:



The user types WRD=(heart OR cardiac) AND surgery. This retrieves all records containing heart or cardiac, together with the word surgery.

The user can also choose in which base the search will be made. The default base is always the current base.

To display a Results List, the user clicks **Go**.

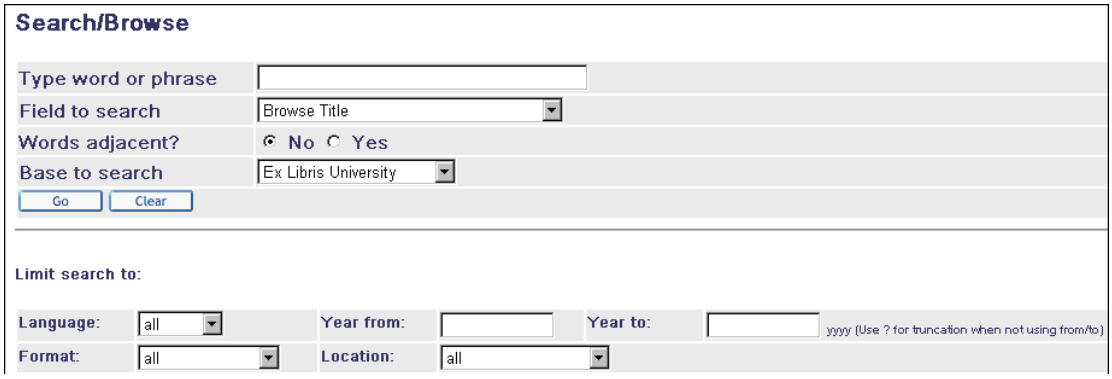
The Base to search field in is automatically filled with the name of the current base.

When the user makes a search with no results and than clicks **CCL**, the command test box is populated with the search string and the appropriate Words adjacent? option is selected, according to the choice made in the "Basic Search" query.

Note: When searching by WYR (Year of publication), the user can search by range of years using the -> sign. For example, WYR=1999->2002.

4.7 Search/Browse

The Search/Browse screen allows the user to make a search query and a browse query from the same screen:



The user can use a pull-down menu to specify which query he wants to perform and on what fields.

As search and browse options exist on the same page simultaneously, if the user chooses to perform a search, all the special character functionality will be available to him. If he chooses browse, the Words Adjacent option will be irrelevant.

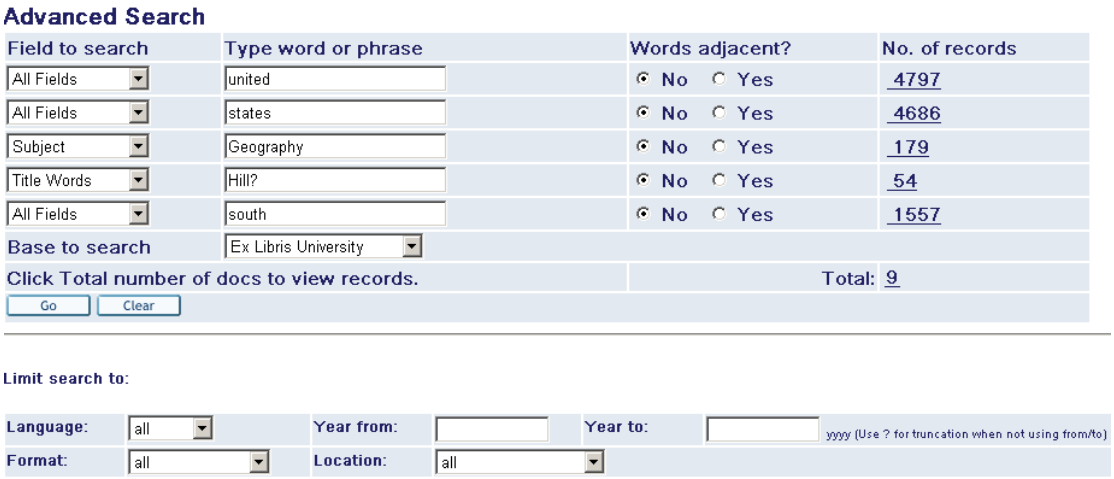
If a search query is made, a Results List appears, if Browse is chosen, a Browse list is displayed.

4.8 Advanced Search

Advanced Search lets the user search the database for keywords. The user can use pull-down menus to specify fields and define search mode. The Web OPAC offers various fields, such as Author, Subject and Title. The relationship between these five fields is handled by the Logical operator, AND.

4.8.1 Performing an Advanced Search

From the Basic Search window, the user clicks **Advanced Search**. The Advanced Search form appears:



The user selects the fields he wants to search using the pull-down menus.

The user can also choose in which base the search will be made. The default base is always the current base.

The user types in the required keywords, and clicks **Go**. The *No. of records* column appears to the right of the form. This column shows the number of records that match the search request.

To view a list of records, the user can click on an adjacent link in the *No. of records* column.

4.9 Limiting Searches

The search limit option is available in all the Search screens. The search limit option allows the user to limit his searches according to fields such as year, format, language, and so on.

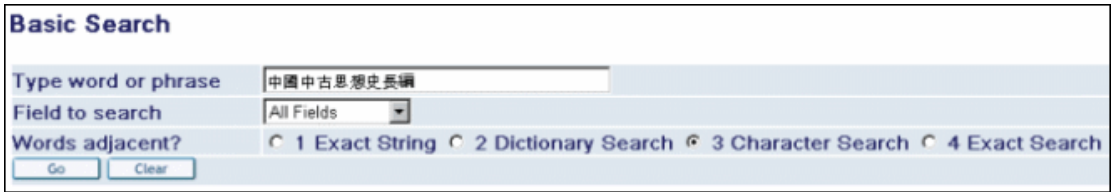
4.10 The Authority Database as a Search Aid

The user can use an Authority database as an aid for searching for records in the bibliographic database. This functionality is particularly useful when classification (such as UDC) is used for subject indexing of the bibliographic database and when the

library also maintains an authority database with records that include descriptors for the classification.

4.11 Word Search for CJK

There are four options for a search in CJK:



Exact String: The system looks for the exact string.

Example: A user enters a string of characters *ABCD*. The system looks for the exact string *ABCD*.

Dictionary Search: The system looks for the longest word in the string that matches a word in the dictionary (Z113).

Example: *ABCD* and *XY* are words in the dictionary. A user enters a string *ABCDXY*. The system looks for *ABCD* and *XY*.

If there is no word in the string that matches a word in the dictionary, the search will resemble **Character Search** (see below).

Character Search: the system breaks a given string into characters with the Boolean *AND* between them.

Example: A user enters a string of characters *ABCD*. The system breaks it into *A B C D* with the Boolean *AND* between the characters.

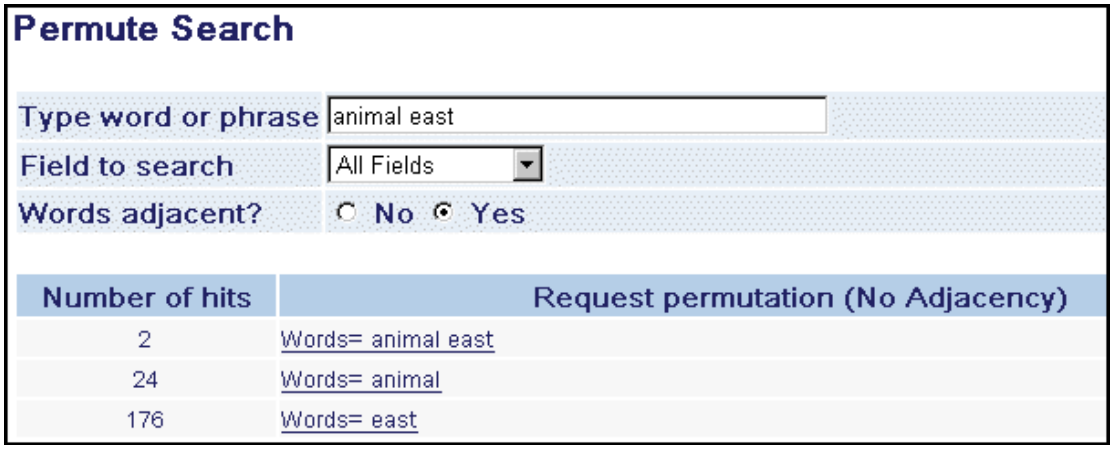
Exact Search: The system looks for the words entered in the indexes. A word is a string between spaces.

Example: a user enters words with spaces such as *ABCD XY*. The system looks for the words.

4.12 Permute Search

A user can search for more than one word. In cases when no results are available and the user chooses to make the search without using adjacency mode, the system will list the words and their hits.

When a user chooses to make the search using adjacency mode, the system will first list the string of words and then the separate words and their hits as shown below:



The results will appear next to the first line if all the words appear in a record, but are not adjacent.

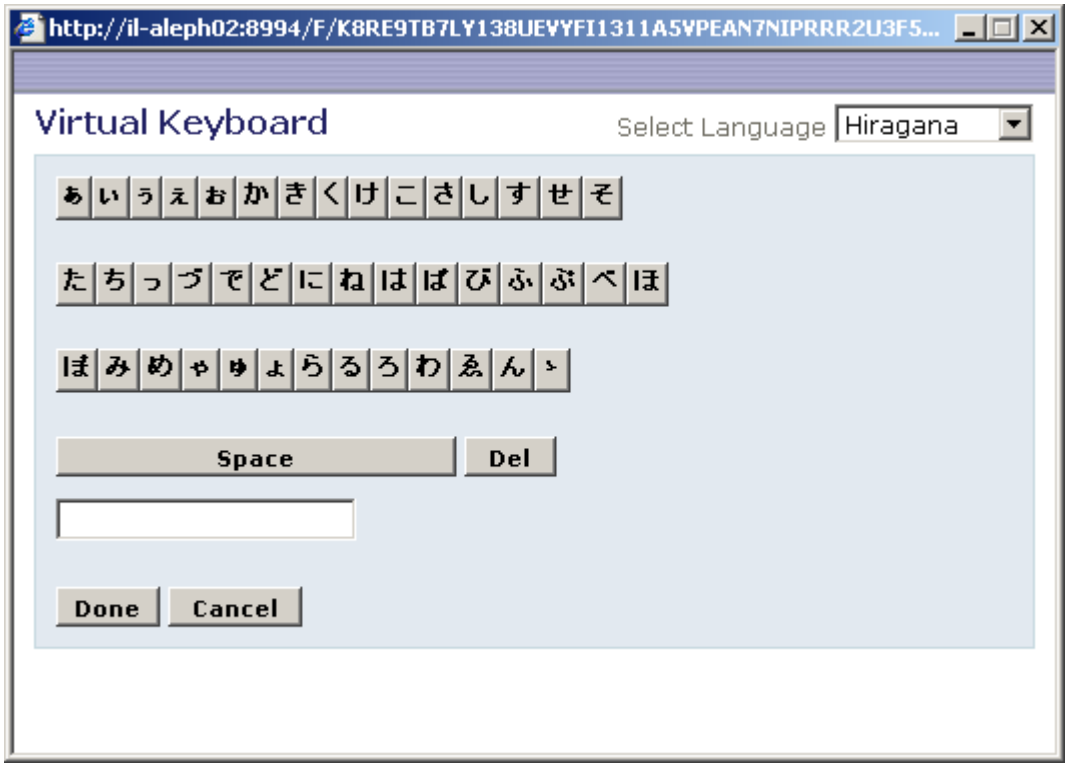
4.13 Floating Keyboard

Multi-language floating keyboard functionality is available in Web OPAC in the following screens:

- Multi field search
- Multi base search
- Advanced search
- Results list

The floating keyboard link is located near the **Go** and **Clear** buttons:

When the user clicks the link, a popup window is opened with a keyboard containing different languages. The user chooses a language and can click on the desired letters/words in the keyboard. They are added to a text line in the bottom of the window.

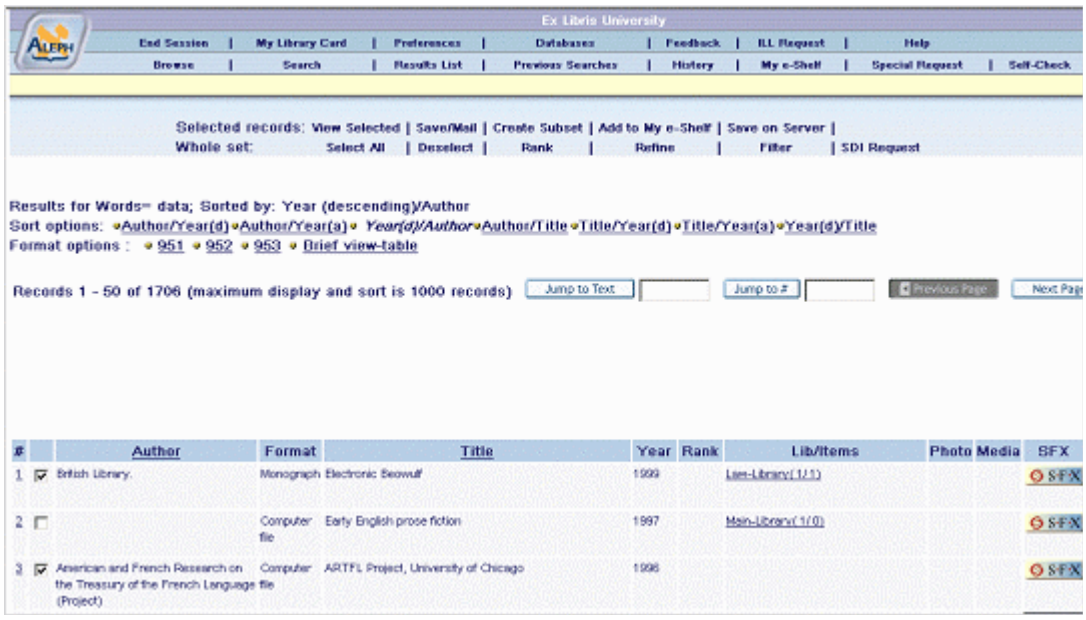


The user clicks **Done** and the text is transferred to the search line in which the cursor was in last.

Note that this function can only be used with Internet Explorer and cannot be used with Mozilla FireFox.

5 Results List

When the user enters a successful search query, a Results List is displayed. The Results List can display up to 1000 records. The Results List shows how many records satisfy the query specifications:



Each record in a Results List is sequentially numbered. The user can view the results list of his last search by clicking Results List on the menu bar. The user can view a results list of earlier searches by clicking **Previous Searches** on the menu bar.

The search results can be displayed in different formats, (the display format depends on library setup, or on preferences set by the user in the Preferences option or in the user's Personal Profile).

The Results List screen contains a number of options for treating records. These options are displayed in an options bar:

5.1 Sort Options

The user can sort records using predefined sort options. These sort options appear in a bar above the Results List:

For example, if the user searches by Author/Year(d), ALEPH first sorts records by Author, and then by Year.

Additionally, in the Brief view table, the user can click a column heading to sort the list (for example, clicking Author sorts records by Author, then Year).

Keep in mind that ALEPH sorts records in either descending or ascending order, and that ALEPH also ignores certain stopwords, such as *A* or *The*, depending on the library setup. The set remains in the last order selected, and the sort parameter is displayed at the top of the screen (for example, *Year then Author*).

5.2 Jump Options

There are two options that enable the user to jump to designated records in the set, Jump to Text and Jump to #. These options are located above the Results List.

Jump to Text

This option enables the user to jump to designated records (according to the parameter by which records were sorted). For example, a user searches for plays by William Shakespeare, and retrieves 113 records. He then sorts these records by Title/Author. When he enters *Mea* in the Jump to Text box, the Results List reappears, beginning with *Measure For Measure* and continuing through to the end of the alphabet.

Jump to #

Jump to # This option enables the user to jump to a record by entering its number in the Jump to # box. For example, a user searches and retrieves 113 records. When he enters *54* in the Jump to # box, the Results List reappears, beginning with record number *54* and continuing through to record number *113*.

5.3 View Selected

From the Results List in Table format, View Selected lets the user view selected records in Full view.

To view selected records:

To view specific records from the Results List, the user selects records and clicks View Selected,

OR

To view all the records displayed, the user clicks Select All, then View Selected. ALEPH displays the selected records in Full format. The user can navigate through the selected records by clicking the Previous/Next record button.

OR

To view a particular record, the user clicks its sequential number. From this Full View, the user can go backwards and forwards to the previous and next records.

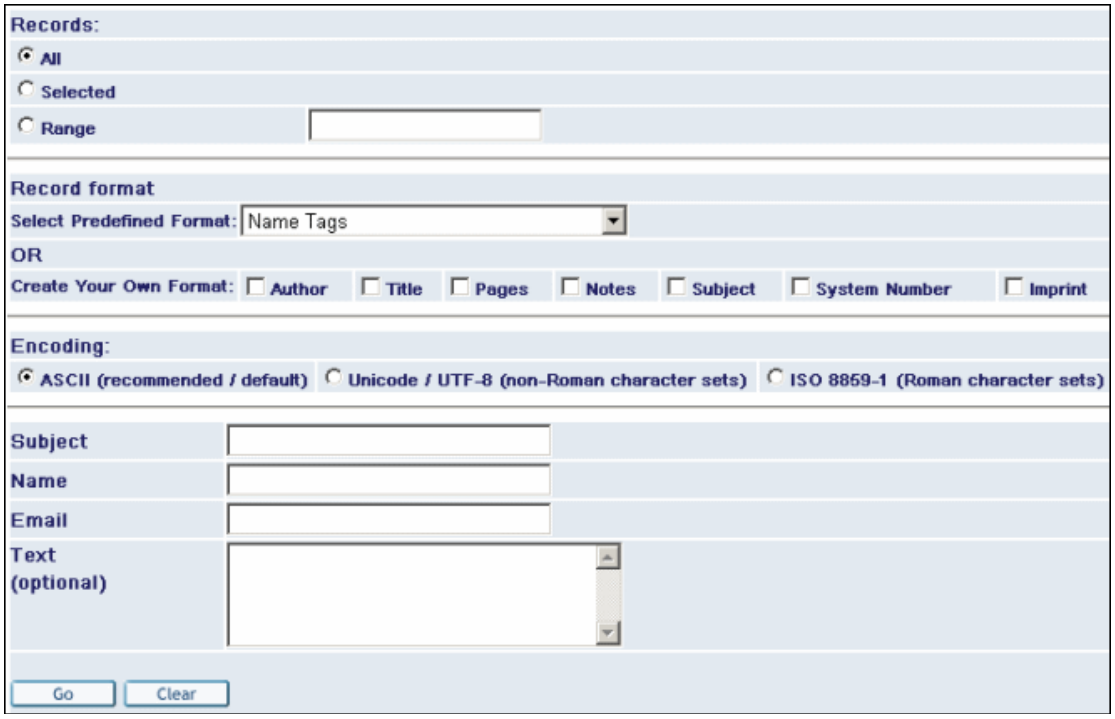
5.4 Save/Mail

This option is available to all users (provided that the *number of max. save/mail* setting in the current user profile is greater than 0).

Save/Mail lets the user save locally and/or send via e-mail either selected records or a subset of records from the Results List.

5.4.1 Saving a Record on the Local PC

From the Results List, the user clicks Save/Mail. The E-mail or Save Selected Records form appears:



The user fills in the relevant details, without typing an e-mail address, and clicks **Go**.

5.4.2 Sending a Record by E-mail

From the Results List, the user clicks **Save/Mail**. The E-mail or Save Selected Records form appears.

The user fills in the relevant details, including the destination e-mail address and clicks **Go**.

5.5 Create subset

5.5.1 Creating a Subset of Records

To create a subset of records:

The user selects records from the Results List.

The user then clicks **Create Subset**. Web OPAC displays the subset in a brief table view or a full view (depending on preferences).

The subset of the records can be mailed/saved or added to a folder using My e-Shelf. Each record of the subset can be viewed in Full view format by clicking the underlined number of each record.

5.6 Add to My e-Shelf

This option lets a user save selected records to a buffer (whether or not this buffer is temporary or permanent depends on whether the user is a guest or a patron).

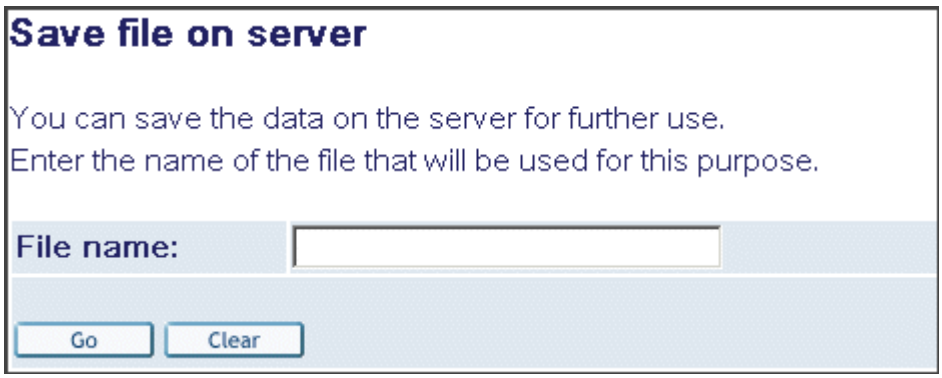
5.7 Save on Server

This option is only available to users with Save permission defined in their patron profile.

The Save on Server option lets the user save selected records from the Results List on the server.

To save a file on the server:

From the Results List, the user selects records and clicks Save on Server. The Save File on Server form appears:



The user enters the file name that he wants to save the records under, then clicks **Go**. The file is saved in `alephe_scratch`.

5.8 Rank

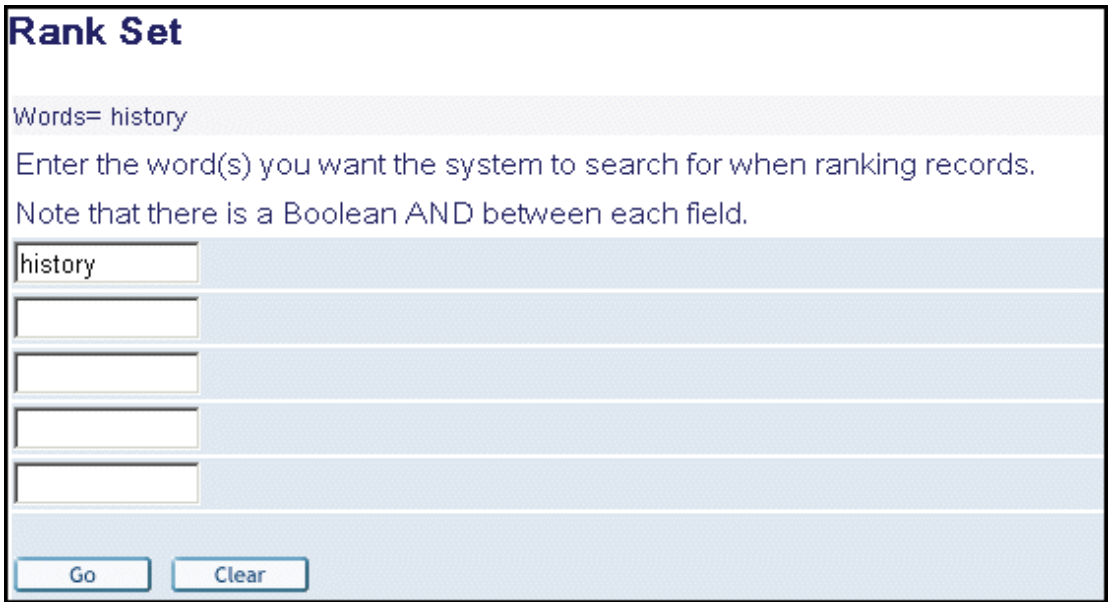
Web OPAC can rank sets, using the words that appear in the Rank Set window (see below). Web OPAC ranks the sets, using the words of the search query. Records are ranked according to a formula that takes into account the number of times the word appears in a record (a document gets a higher ranking if a significant word occurs several times), and the weight given to the word (for example, if the word appears in the title, it might be given greater weight.)

Note that there is a Boolean AND operator between each field.

5.8.1 Ranking Sets

To rank sets in Web OPAC:

From the Results List, the user clicks **Rank**. The Rank Set window is displayed with the original search query:



The user enters the word(s) he wants the system to search for when ranking records, and clicks **OK**. A ranked Results List table appears:

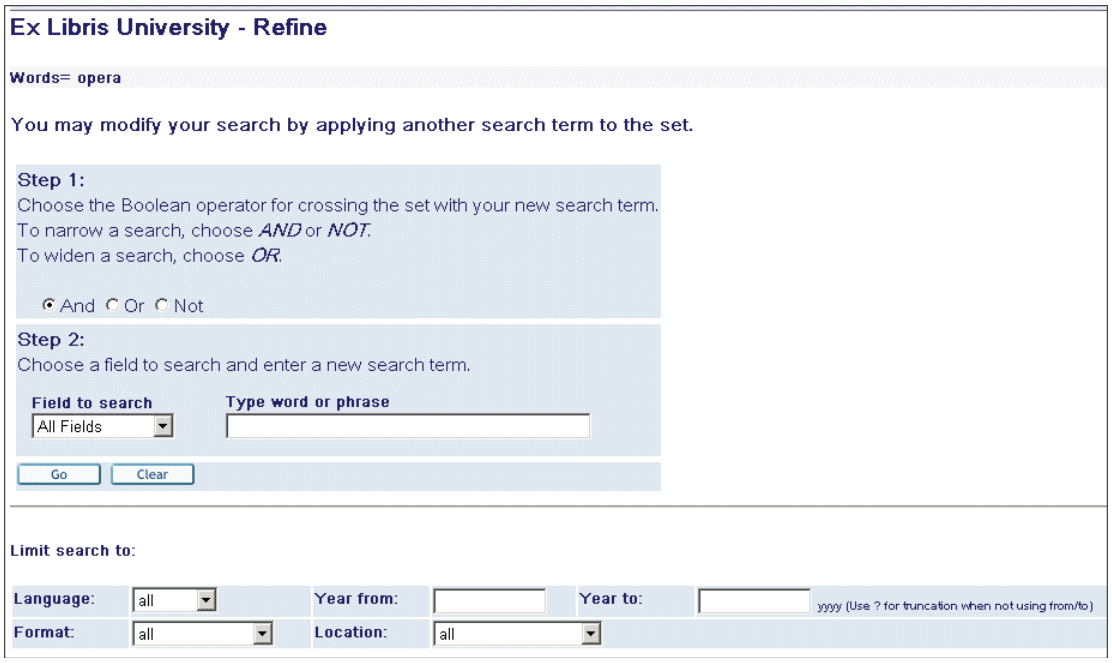
#		Author	Format	Title	Year	Rank
1	☐	Butler, Kenneth D.	BK	Early Japan :	1976	1000
2	☐	Friedman, Milton,	BK	The great contraction, 1929-1933	1965	857
3	☐	Laughlin, J. Laurence	BK	The history of bimetallism in the United States.	1968	428
4	☐	Keegan, John	BK	An Illustrated History of the First World War.	2001	142
5	☐	Lewis, Bernard	BK	The Middle East: A Brief History of the Last 2,000 Years.	2001	142
6	☐	Gilbert, Martin	BK	The Jews in the Twentieth Century : An Illustrated History	—	142
7	☐	Schama, Simon	BK	A History of Britain, Volume II: The Wars of the British 1603-1776.	2001	142
8	☐	Smith, Tom	BK	History of mumps.	2001	142
9	☐	Lake, John	SE	Modern History Bulletin.	1998	142
10	☐	Morrison, Henry	BK	History in the cyber age.	1998	142

5.9 Refine

Refine lets the user modify a search by adding search terms to the set.

5.9.1 Refining a Search

From the Results List, the user clicks **Refine**. The Refine window appears:



To produce a new set that is narrower than the original one, the user chooses one of the Boolean operators AND or NOT. To widen a search, the user can choose OR.

The user chooses a field to search, such as Author, Title, Subject and so on, and enters a new search term.

The user can further limit his search by filling in the fields in the **Limit search to:** section of the window (if the System Librarian has made this section available).

When the user clicks **Go**, a modified list of records is displayed.

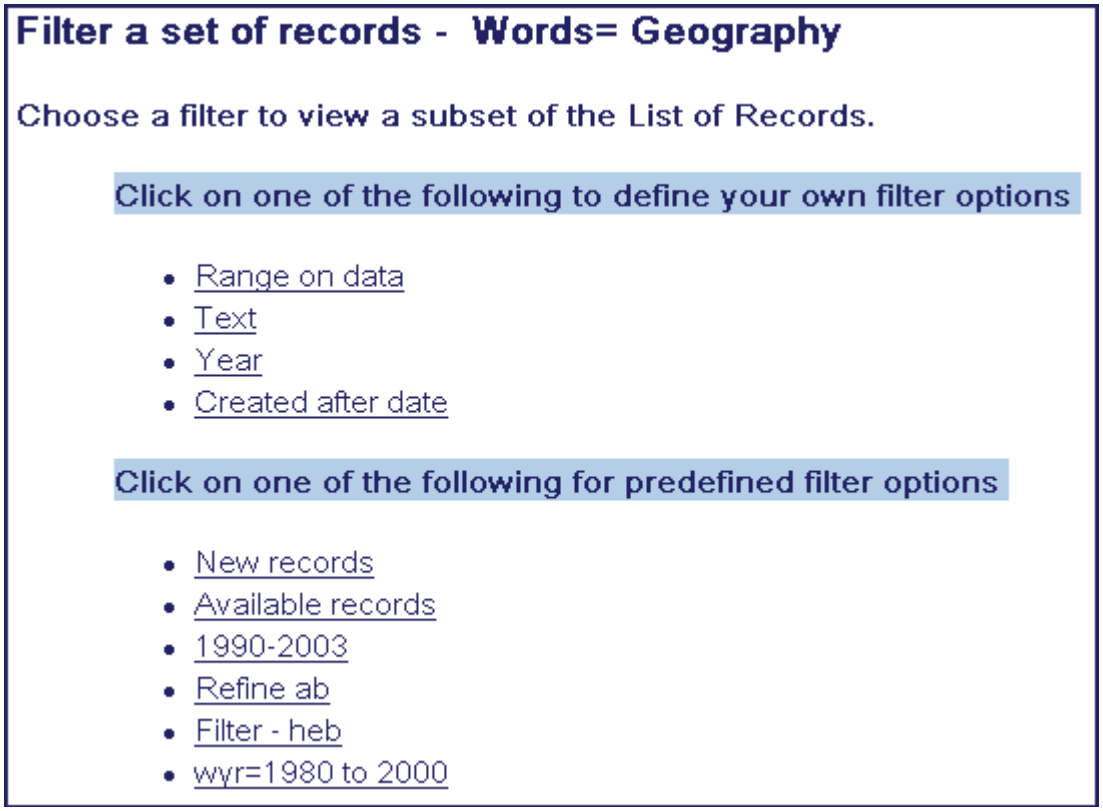
5.10 Filter

Filter lets the user define filter options post-search, creating his own filter or using predefined filter options.

5.10.1 Using Filter

From the Results list, the user clicks **Filter**. The Filter form is displayed (see below).

The user chooses a filter to create a subset. For example, the user can create a subset in a specific language. If the user clicks Filter-*lng*, the records are filtered accordingly.



5.10.2 User-defined Filters

These are filters which operate on parameters specified by the user.

Range on Data

The Range on Data filter displays records containing terms relating to the text in the range specified by the user.

Example: The Title field, from *a* to *b*, shows all the titles in the list beginning with the letter *a* through all titles beginning with the letter *b*.

Text

The Text option specifies that the Web OPAC searches the WRD Index for words determined by the user in the text box filter.

Example: Defining 'Title' as the field, and 'poems' as the text, displays all the records in the list containing the word 'poems' in the title.

Year

The Year filter displays all records in the date range defined by the user.

Example: 1992 to 1995 includes all records in the list published from the beginning of 1992 up to the end of 1995.

Created After Date

The Created After Date filter checks all the records that have been created since the date typed in by the user.

5.10.3 Predefined Filter Options

Predefined filter options are filters which operate on parameters predefined by Web OPAC.

New Records

The New Records filter displays all records added or modified within the last seven days. Web OPAC checks the CAT field in the Catalog record to determine the date.

Available Records

The Available Records filter displays records which currently have copies in the library.

1990-2003

The 1990-2003 filter displays records that were published between 1990 and 2003.

Refine ab

The Refine ab filter displays all records of the current set containing words beginning with the letters *ab*. The Refine ab option specifies that Web OPAC searches the WRD Index for words starting with *ab*.

Wyr=1980-2000

The Wyr=1980-2000 filter displays all records of the current set containing the years 1980 to 2000 in the WYR (words in year field) index.

Filter - *lng*

The Filter - *lng* filter shows all records of the current set containing, for example, *eng* for English in the WLN (Words in Language Field) index.

5.11 SDI

A patron can set up an SDI (Selective Dissemination of Information) request from the current Results List and Previous Searches screens. The SDI function is designed to alert patrons to recently added or updated records in their specified area of interest. This is particularly important for researchers and scholars for whom access to the latest information is essential (for example, medical or legal updates). The SDI function can be tailored to fit the interest profile of a specific individual or group.

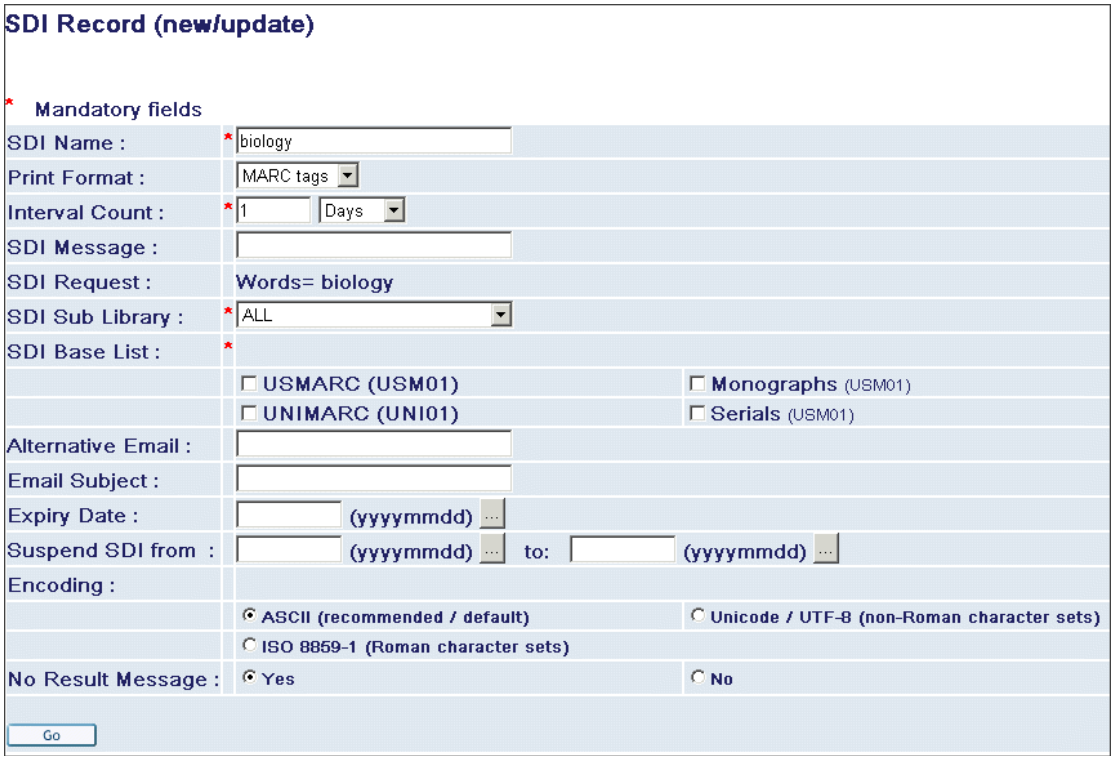
The SDI mechanism enables sending notification about new publications on a specific field as well as new journal issues that arrive at the library.

An SDI request defines a search query, a sublibrary to search (a patron may also set his SDI request regardless of location), a list of bases to search, a frequency with which the SDI query will be run, expiry date for the SDI request, the suspend period, and the character set. When the library activates a special service, the system runs the query and retrieves records that have been added to the database since the last time the query was run. The resulting set is sent by e-mail to the patron. The format of the records is defined in the patron's SDI profile.

A patron must have SDI permission in his profile in order to be able to create SDI requests.

Note that SDI requests can also be typed in CCL (Common Command Language).

To make an SDI request, the patron must click the SDI Request from the current search results list or from a previous search. The SDI Record (new/update) window appears:



Key to Fields:

SDI Name
A patron enters the name that he wants to save his request under.

Print Format
A patron chooses the print format that he wants to receive his records in.

Interval Count
A patron defines the intervals between runs of his SDI query, for example, seven days, four weeks, and so on.

SDI Message
A patron can enter a text of a message to be included into the SDI notification's body.

SDI Request
Displays the original search term (for example words= *Buddhism*).

SDI Sublibrary
A patron can set his SDI query to run for a specific location or regardless of location.

Note

If an SDI profile is set regardless of location (All from the drop-down menu of Locations), the query will retrieve only records that are absolutely new in the entire database. Records that are new in a specific sublibrary but are not new in other sublibrary/sublibraries will not be sent to the patron.

SDI Base List
A patron selects the bases that he wants his SDI request to run on by marking the relevant check boxes.

Alternative Email
A patron can define an alternative e-mail address for his SDI results lists to be sent to. An e-mail address must be defined on either the patron's Z304 record (patron's address) or on the *Alternative email* field of the SDI profile page. If it is defined on both, the SDI results lists will be sent to both addresses.

Email Subject
A patron can define a subject for his SDI results lists.

Expiry Date
A patron can define the expiry date for his SDI profile. The SDI results lists will not be sent to the patron after this date. A library runs a special batch job that alerts patrons whose SDI profile is going to expire. If a patron who receives this notification does not change the expiry date, he will not be notified again.

Suspend SDI from/to
A patron can suspend his SDI searches for a certain period (for example, vacations). Even if new records that meet the criteria of his SDI profile are added to the database, the patron will not get SDI notifications till the end of the suspension period.

Encoding
A patron can select the character set in which he wants to receive his SDI results list.

No Results Message
The patron can define whether or not to receive reports of SDI searches that retrieve zero results.

5.12 Empty Sets

If there are no matches, a new window opens, either showing the entries in the Index closest to the query specifications or showing the request permutation.

Search Query With One Word

If the user's search query includes only one word and is unsuccessful, the Web OPAC displays a list of words from the index. This list includes several words that appear directly before the given word, and several words that appear directly after it. In the example below, the search term *antimony* was not found:

No. of Recs	Entry
4	antichrist
2	antidepression
4	antifederalism
1	antiquos
1	antiidealistic
	antinomy
4	antioch
2	antiqua
2	antiquarian
1	antiquites
58	antiquities

Search Query With More Than One Word

If the user's search query includes several words and is unsuccessful, the Web OPAC displays the request permutation, showing the sets retrieved for each word. In the example below, the search term *black forest* was not found:

Number of hits	Request permutation
15	Words= black
14	Words= forest

The user can click the words which are underlined and retrieve records containing that word only.

6 Previous Searches

Previous Searches lists sets from past searches in the current session and lets the user:

- View a set and see the list of records in the set.
- Delete a set from the list.
- Cross sets.
- Make an SDI request, if he is a library patron (see SDI on page 39).
- Save sets into a permanent history buffer, if he is a library patron.

| View | Delete | Cross | SDI Request | Save |

Previous Searches

	Database	Search Request	No. of Records
☐	Ex Libris	Words= River	294
☐	Ex Libris	Words= amazon	9
☐	Ex Libris	Words= Brazil	96
☐	Ex Libris	Words= Shakespeare	197

6.1 Viewing Sets

The user clicks **Previous Searches** from the menu bar. A Previous Searches list is displayed.

The user selects a set by marking the relevant check box. Only one box can be selected at a time.

By clicking **View**, a records list for the sets selected is displayed in the Results List window.

6.2 Deleting Sets

The user clicks **Previous Searches** from the menu bar. A Previous Searches list is displayed.

The user selects sets by marking the relevant check boxes.

By clicking **Delete**, the sets selected are deleted.

6.3 Crossing Sets

The user clicks **Previous Searches** from the menu bar. A Previous Searches list is displayed.

The user selects sets by marking the relevant check boxes. At least two sets must be selected.

By clicking **Cross**, the Cross between Sets form is displayed:

Cross between sets

Select logical operation between sets :

- And
- Or
- First set not second
- Second set not first

Go

No.	Search Request	No. of Records
1	Words= Brazil	96
2	Words= amazon	9

From the options available the user selects a logical operation, and clicks Cross. A results list is displayed.

6.3.1 AND and OR

To cross sets with AND and OR, the user can choose an unlimited number of sets.

6.3.2 First Set not Second / Second Set not First

To cross sets with the "First Set not Second" and "Second Set not First" operations, the user chooses two sets only.

The "First Set not Second" operation retrieves records that are contained within the first set only.

The "Second Set not First" operation retrieves records that are contained only in the second set.

6.4 Saving Previous Searches

The patron can click **Save** to store a previous search in a permanent history buffer. This means that the record of a search is preserved for future use when the session is ended. Searches saved in the permanent history buffer can be viewed when the History option on the menu bar is selected.

7 Full Record Display

The Full view comprises the most complete display of the data elements contained in a bibliographic record. Exactly which data elements are shown depends on the library

setup.

The Full View of the Record is displayed:

When the user clicks the numbered hyperlink on the left of the record in Brief View, as shown below:

#		Author	Format	Title	Year	Rank	Lib/Items	Photo	Media	SFX
1	☐	Berlin, Irving,	Printed music	Irving Berlin's Lower East Side songbook :	1995		Music-Library(1/ 0)			SFX
2	☐	Partch, Harry,	Sound recording	17 lyrics of Li Po	1995		Humanities-Library(1/ 0) Music-Library(1/ 0)			SFX

or

When the number of records obtained by a Browse or Search is below the number specified in the user's Auto Full Preference.

Here is an example of a full record display:

7.1 Full View Functionality

The Full View of the Record in Web OPAC allows the user to perform certain actions, define the display format, and access services in regard to that record.

The actions are contained in the options bar which appears above the Full view:

The various choices for formatting the display appear directly below the options bar:

Choose format: Standard format Catalog card Citation Name tags MARC tags

For more information, see below.

Services can be accessed via the relevant line (hyperlink) in the record display. For more information, see below.

Additionally, if there is more than one record in the set, the user can view the remaining records by clicking the Previous Page or Next Page icons.

7.1.1 Title Request

When the user clicks **Title Request**, the system checks whether or not all of the title's items belong to the same group, meaning that they all have common enumeration and chronology information. If they do not belong to the same group, a list of the groups will be displayed:

Title Request - Stage 1

	Year	Month	Day	Volume	Issue	Part	Material
Request				v.2			BOOK
Request				v.1			BOOK

If the user selects one of the groups, a request form appears. If the system detects that all of the title's items belong to the same group it will skip this stage and immediately open the request form.

Title Request - Aadland, Dustin

Items are currently available at the following locations:
Main Library

Pickup/delivery location :	Economics Library
Period of interest :	from 20060122 to 20060322 (Date format : yyyymmdd)

Enter additional information as necessary:

Author of article	
Title of article	
Pages	
First Note (or table no. for closed stack request)	
Second Note	
Rush Handling	☐

Title Request Information:

Material	BOOK
Year	
Month	
Day	
Volume	2
Issue	
Part	

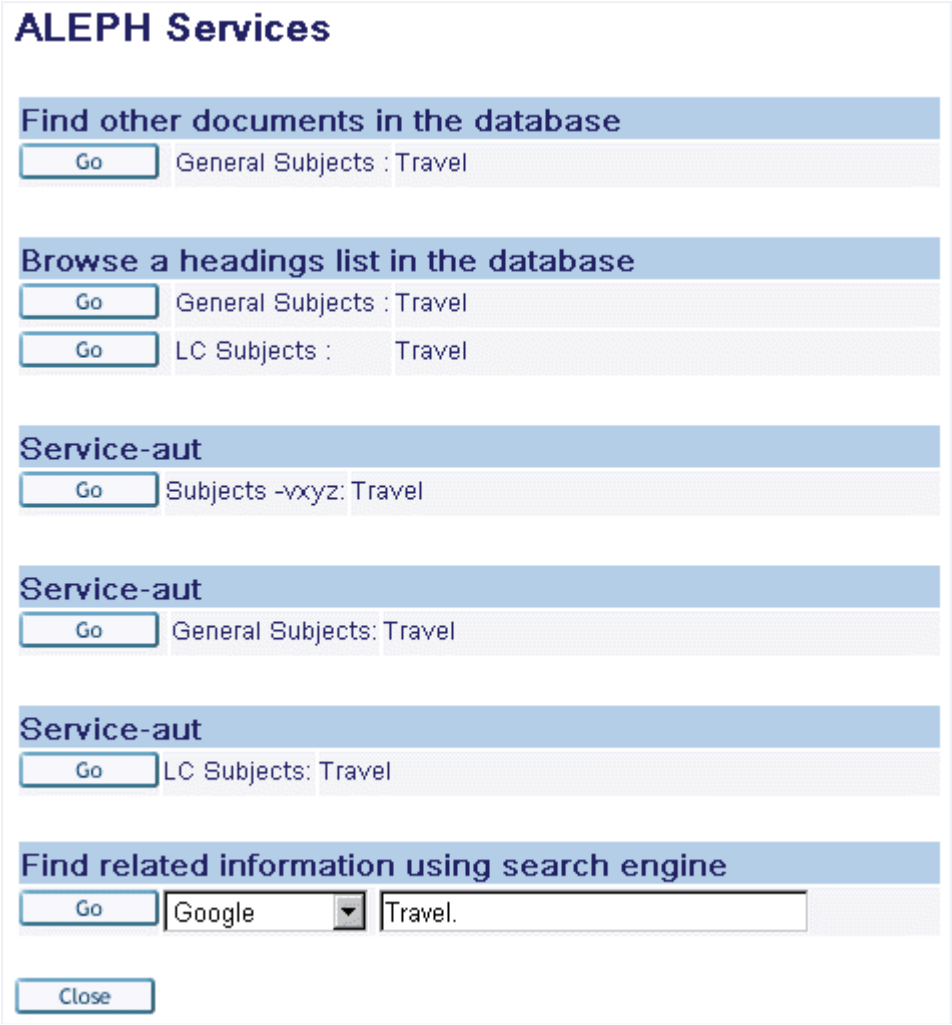
7.1.2 Display Format

The user can choose the display format of the record. The choices available are:

- Standard - includes pre-set fields and allows navigation by clicking the field text to display a window of available services (such as BROWSE or SEARCH).
- Catalog card
- Citation
- Name Tags - all fields of the record with tags in name format.
- MARC tags - all fields of the record, with tags in MARC values.

7.1.3 Services

The availability of services from the Full view is dependent on the library setup. When the user clicks a hyperlink adjacent to the icon, a Services window appears. Here is an example of the services available:



From this window, the user can:

Browse a headings list in the database

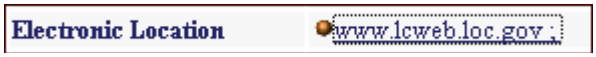
Find other documents in the database

Find related information using search engines (Google, Excite, Britannica, AltaVista, and so on).

See Authority references.

7.1.4 Electronic Location

Depending on the library setup and on user privileges, the Full view can display external links to electronic resources relevant to the record (such as a URL):



Electronic Location hyperlinks can facilitate the electronic transfer of a file, a subscription to an electronic journal, or a logon to an electronic resource.

7.2 Holdings

Holdings are the total stock of materials (print and non-print) owned by a library or library system and listed in its catalog. The Full view can contain holdings links that represent titles in the library catalog. The holdings functionality lets a library patron view the number and call number of specific items.

Key to Holdings Links

A library typically includes only one of the following options:

Holdings (1)

- All items

Lists all items (all years/vols./libraries).

Holdings (2)

- Item (no., year, for example, 1969): intended for serials

Lists item records that is, vol., no., and so on. for year selected.

Holdings (3)

- by sublibrary, for example, Education USM50

Lists item records for sublibrary selected.

Clicking left column (Holdings) displays information about the library.

Holdings (4)

- links to items in remote libraries without providing circulation information (special applications only).

Holdings (5)

- by sublibrary, taken from the default holdings sublibrary in the patron's profile. Other sublibraries can be requested from the list of items.

Holdings (h)

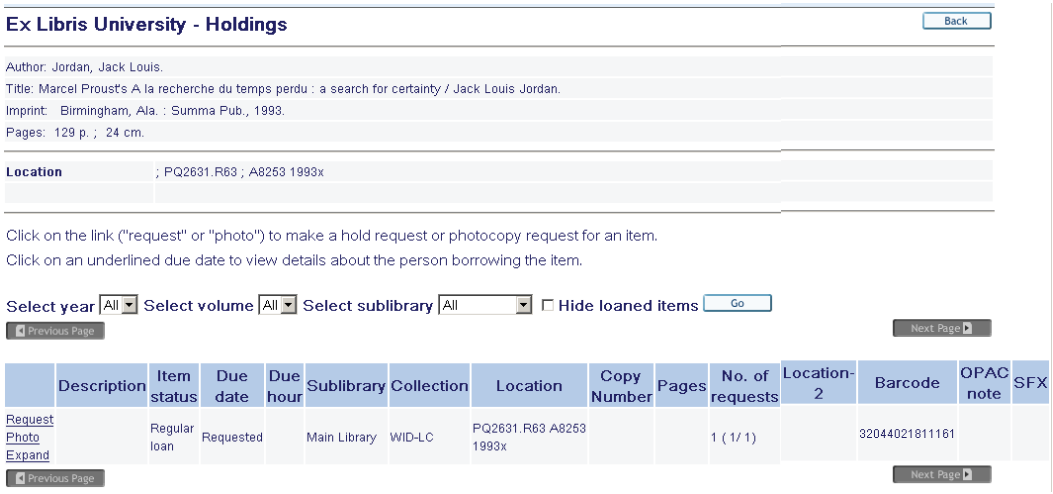
- links to holdings and items. Each sublibrary and collection is listed on a separate line. Note that the holdings and items display is not sensitive to collection and displays the data at the sublibrary level.

7.2.1 Holdings Windows

In order to reach the Holdings window, from the Full Record screen, the patron selects one of the hypertext holding links such as *All items*; *Item (no., year)*; the sublibrary name for example, *EducationUSM50*. The type of links displayed depends on the library setup.

An additional way to reach the Holdings window is from the Results List in table format, when there is a link to a library or location.

The Holdings window displays holdings information for items selected by the patron (see example below).



The Holdings window consists of three sections:

Top section - contains bibliographic information, provided there is a holdings record.

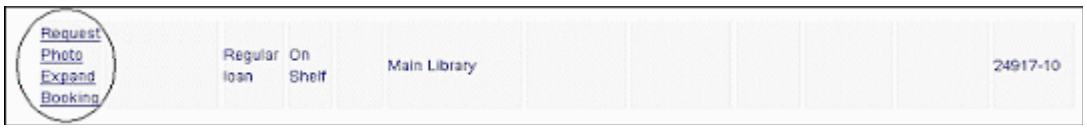
Middle section - contains options for filtering the holdings list.

This is particular useful for libraries with large collections of serials.

Bottom section - contains administrative information.

7.2.2 Holdings Options

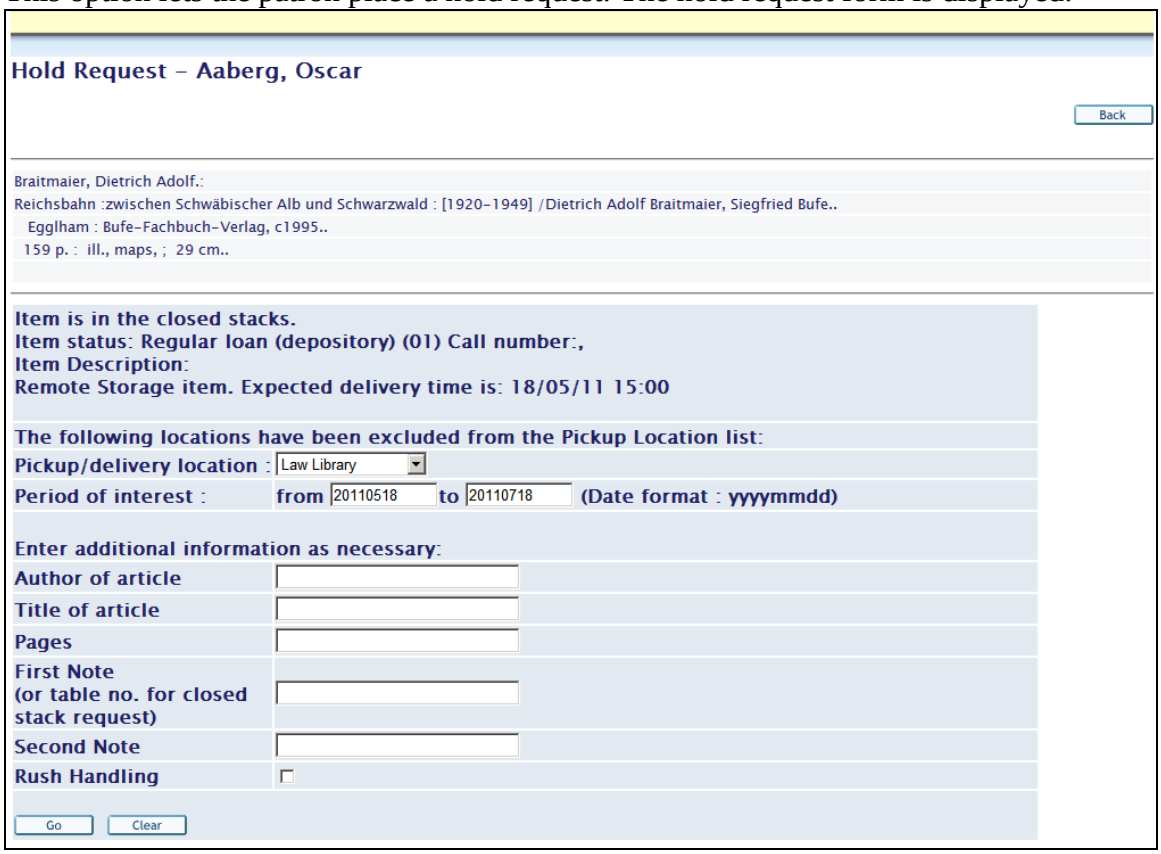
The Holdings window can contain several different hyperlinked actions for each item:



The options that can be accessed via these links are as follows:

Request

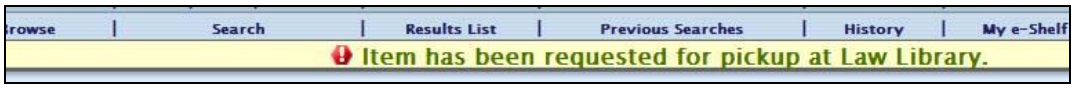
This option lets the patron place a hold request. The hold request form is displayed:



Clicking **Go** directs the End user to the Hold Request Details page:

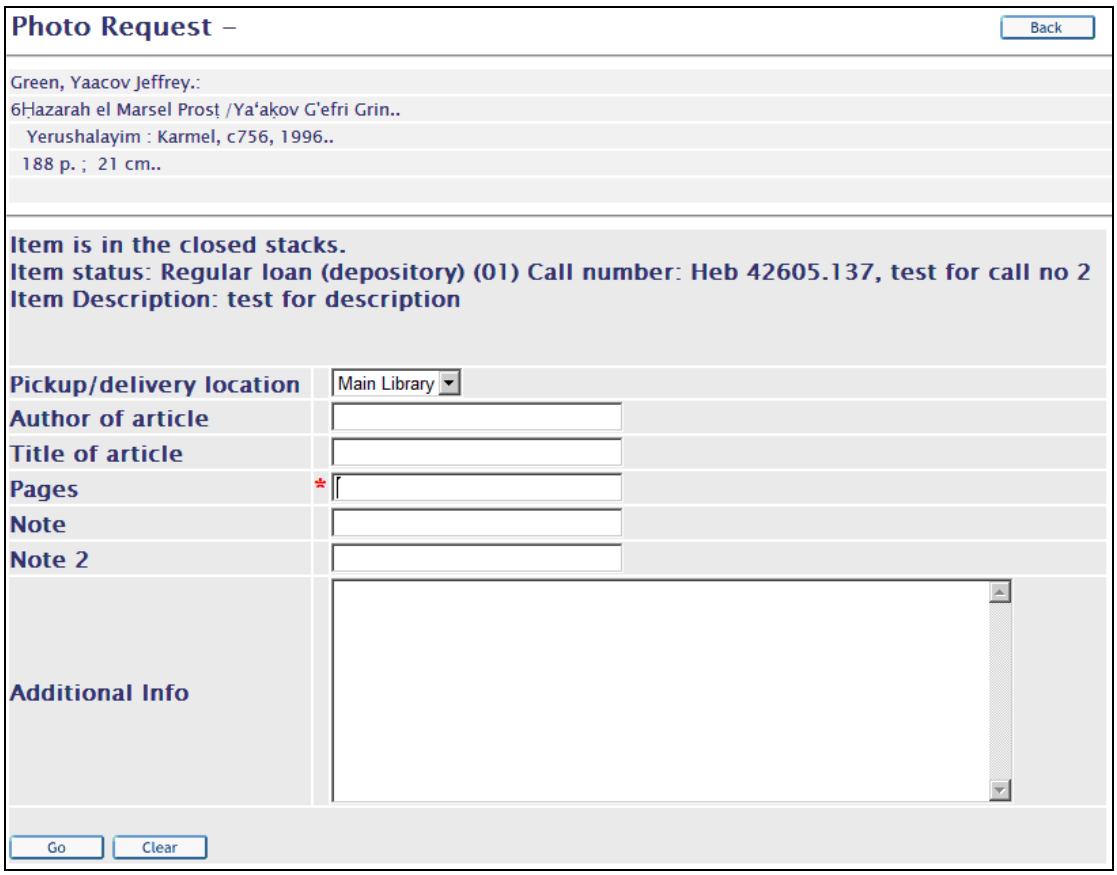
The user may go back to the previous page and change the details by clicking **Back** and print the hold request details by clicking **Print**. In order to activate the request, the user must click **Go**.

After clicking **Go**, the following message is displayed in the Full view of the record:

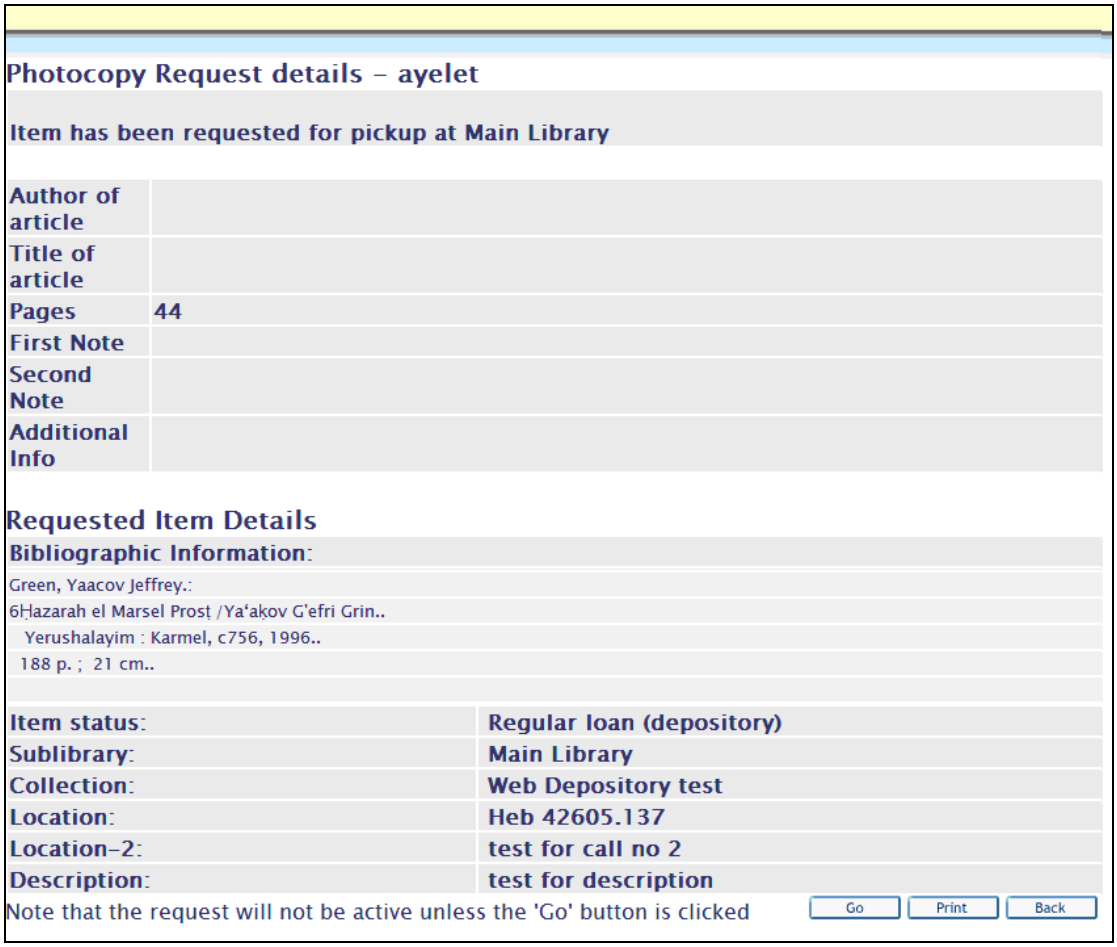


Photo

This option lets the patron make a photocopy request. A photocopy request form appears:



Clicking **Go** directs the End user to the Photo Request Details page:



Photocopy Request details – ayelet

Item has been requested for pickup at Main Library

Author of article	
Title of article	
Pages	44
First Note	
Second Note	
Additional Info	

Requested Item Details

Bibliographic Information:

Green, Yaacov Jeffrey.:
6Ḥazarah el Marsel Prosṭ /Ya'aḳov G'efri Grin..
Yerushalayim : Karmel, c756, 1996..
188 p. ; 21 cm..

Item status:	Regular loan (depository)
Sublibrary:	Main Library
Collection:	Web Depository test
Location:	Heb 42605.137
Location-2:	test for call no 2
Description:	test for description

Note that the request will not be active unless the 'Go' button is clicked Go Print Back

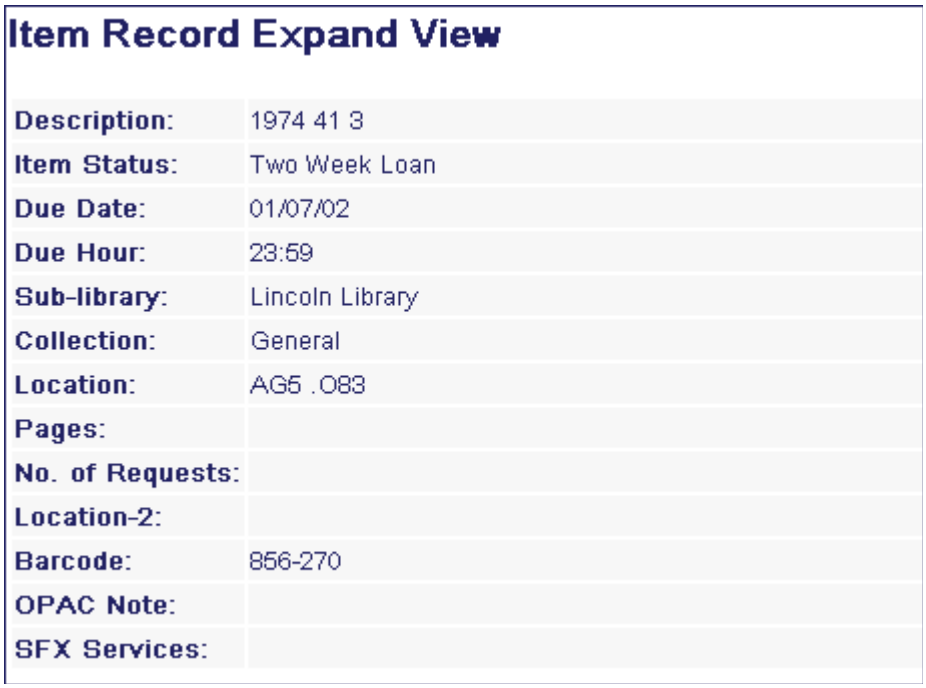
The user may go back to the previous page and change the details by clicking **Back** and print the hold request details by clicking **Print**. In order to activate the request, the user must click **Go**.

After clicking **Go**, the following message is displayed in the Full view of the record:

The photocopy option depends on the library setup and on the patron privileges granted by the library.

Expand

This option lets the patron view all available details about the item record:

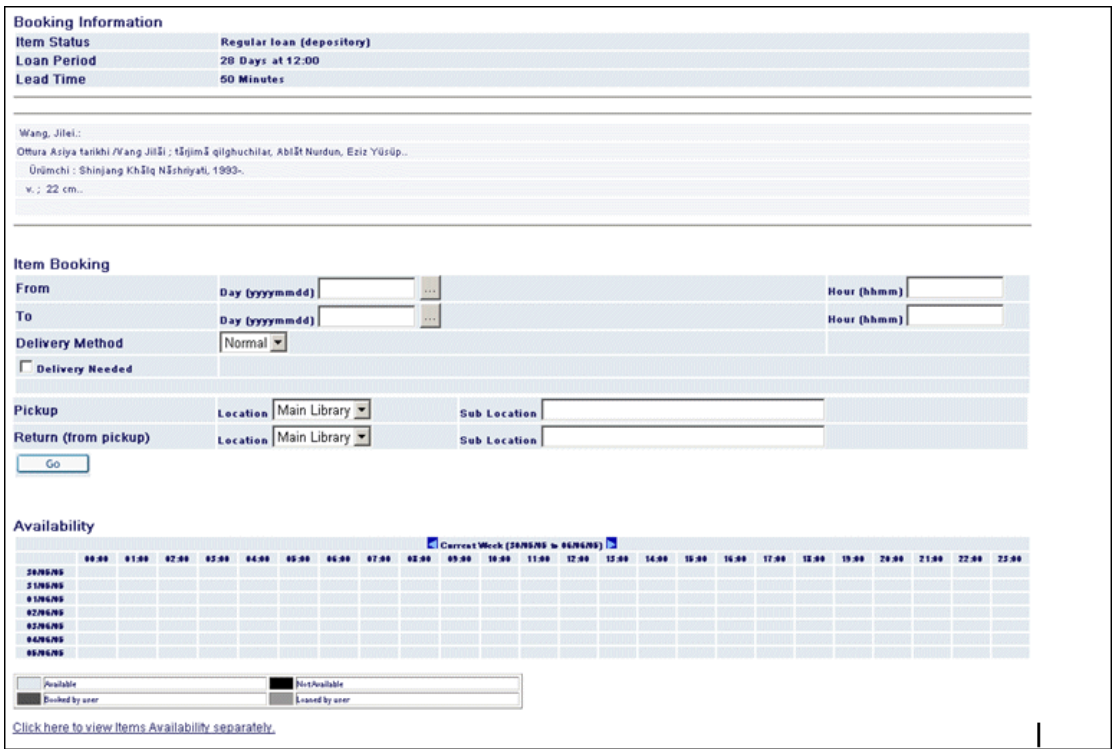


Item Record Expand View

Description:	1974 41 3
Item Status:	Two Week Loan
Due Date:	01/07/02
Due Hour:	23:59
Sub-library:	Lincoln Library
Collection:	General
Location:	AG5 .O83
Pages:	
No. of Requests:	
Location-2:	
Barcode:	856-270
OPAC Note:	
SFX Services:	

Booking

This option lets a user create a booking request. When a Booking link is clicked, the booking request form appears:



The above form has three sections:

Booking information - This section contains general request information such as the item's status, its loan period and its bibliographic information.

Item Booking - In this section, the patron should fill in the request information such as from when and until when it is requested, what the required delivery method is, and the delivery location of the item.

Availability - this section consists of a calendar showing, in block form, the dates of the item's availability. The patron can see for what times a request can be made and when the item is not available, for example, because of other bookings or loans. The link at the button of the page can be used to view the availability calendar of each of the items that are like the requested item.

When the patron fills in this form and submits it by clicking **Go**, the confirmation page appears. A request must be confirmed in order to become an active booking request.

This option depends on library setup and on patron privileges granted by the library.

Due Date

If the Holdings List contains a Due Date hyperlink, this indicates that the item is currently on loan:

request photo expand	Volume 80, Number 3, July 1999	Three Week Loan	On Shelf		Science Library	Reference
request photo expand	Volume 80, Number 2, April 1999	Three Week Loan	09/07/02	23:59	Science Library	Reference

The patron can click the Due Date (if it is underlined) to view details about the patron who has the item checked out:

Borrower of Item	
Patron:	Lanxner, Jules Wadell
	Program of Liberal Studies
	Room 215
	O'Shaughnessy Hall
	Notre Dame, IN 46556
	46556
Telephone:	
Patron status:	06

No. of requests:

The *No. of requests* column can show (with the appropriate settings), the number of Hold requests for an item that has like copies:

<Number of Original hold requests (Total number of hold requests for the item>/ <Total number of like-copy items including the original)>

The example below shows a document that has three items, all of which are like copies. A patron can make a hold request on one of the items (in our example, the hold request was made on 1066-10).

If like copies are available and there is no restriction on "exact" copies only, then two additional hold requests are created automatically. The information in the *No. of requests* column of the requested item is as follows: 1 (1 / 3).

	Description	Item status	Due date	Due hour	Sub-library	Collection	Location	Pages	No. of requests	Location-2	Barcode	OPAC note	SFX
Request Photo Expand		Four Week Loan	Requested		Lincoln Library	General	856.9 | D624a		1 (1 / 3)	439.5(47) KAS	1066-10		
Request Photo Expand		Four Week Loan	On Shelf		Lincoln Library	General					1066-40		
Request Photo Expand		Four Week Loan	On Shelf		Lincoln Library	General					1066-60		

In addition, if another patron requests the same item, the following line is displayed in the item's request window:

```
"There is a total of 1 requests on 3 items"
```

7.2.3 Advance Booking

Many libraries maintain a reserve collection from which patrons can borrow items on a short-term basis (for example, for one or two hours). The library sets up a booking schedule and patrons can request to borrow an item during one of the time slots available in the schedule via the Web OPAC. After requesting the item, the patron goes to the circulation desk of the reserve item collection and the librarian loans the requested item to the patron.

To set up an advance booking, the patron selects a reserve item and clicks **Booking**. A schedule of available time slots for that item appears:

Advance Booking - Smith, John

From			To		Requests
Wednesday	19/06/02	17:00	19:00		request (0/2)
		19:00	09:00	Thursday 20/06/02	request (0/2)
Thursday	20/06/02	09:00	11:00		request (0/2)
		11:00	13:00		request (0/2)
		13:00	15:00		request (0/2)
		15:00	17:00		request (0/2)
		17:00	19:00		request (0/2)
		19:00	09:00	Friday 21/06/02	request (0/2)
Friday	21/06/02	09:00	11:00		request (0/2)
		11:00	13:00		request (0/2)

The patron selects an available time slot and clicks the adjacent **request** link. The item is made available for pickup during the selected time slot.

7.3 Extended Services

7.3.1 Cover Images (for libraries working with Syndetics)

ALEPH supports the integration of Syndetics' enrichment data within the Web OPAC. This includes bibliographic enrichment data and cover images relating to various types of items, such as books, videos, and DVDs.

The enrichment content resides on Syndetics' Internet servers and is integrated into the Web OPAC through automatic links provided by the ISBNs within your local MARC records. The content is accessed and displayed via a hyperlinked cover image. The cover image is placed on your full record display:

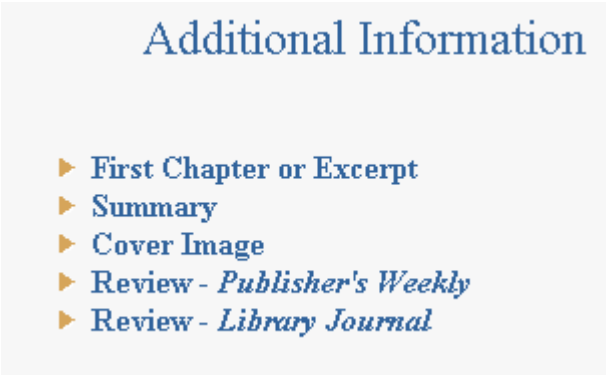
Full View of Record

Choose format: Standard format Catalog card Citation Name tags MARC tags

Record 1 out of 1

Book Number	000034218
LC no.	PS3561.I496 S63 2002
Record Format	Monograph
ISBN	0060504072 (acid-free paper)
Main Entry	Kingsolver, Barbara.
Title	**Small wonder** / Barbara Kingsolver ; illustrations by Paul Mirocha.
Edition	1st ed.
Imprint	New York : HarperCollins Publishers, c2002.
Descr.	xvi, 267 p. : ill. ; 22 cm.
	LOC
Cover Image	

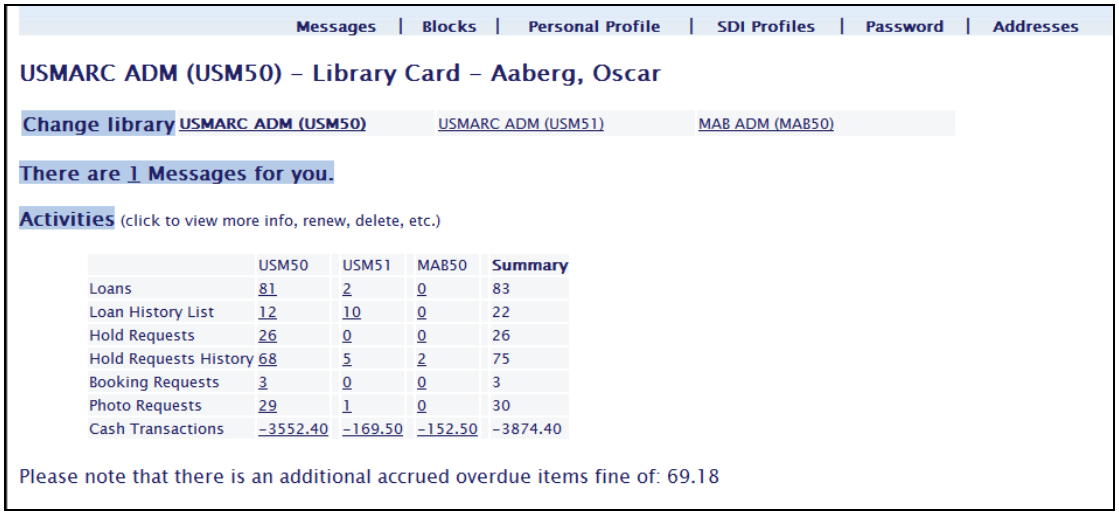
Clicking on the cover image invokes an HTML pop-up window containing the available enrichment elements:



8 My Library Card

This section describes how a library patron can view and carry out his library activities via the Web OPAC.

The patron can access his Library Card by clicking **My Library Card** from the menu bar (provided that he has already signed in):



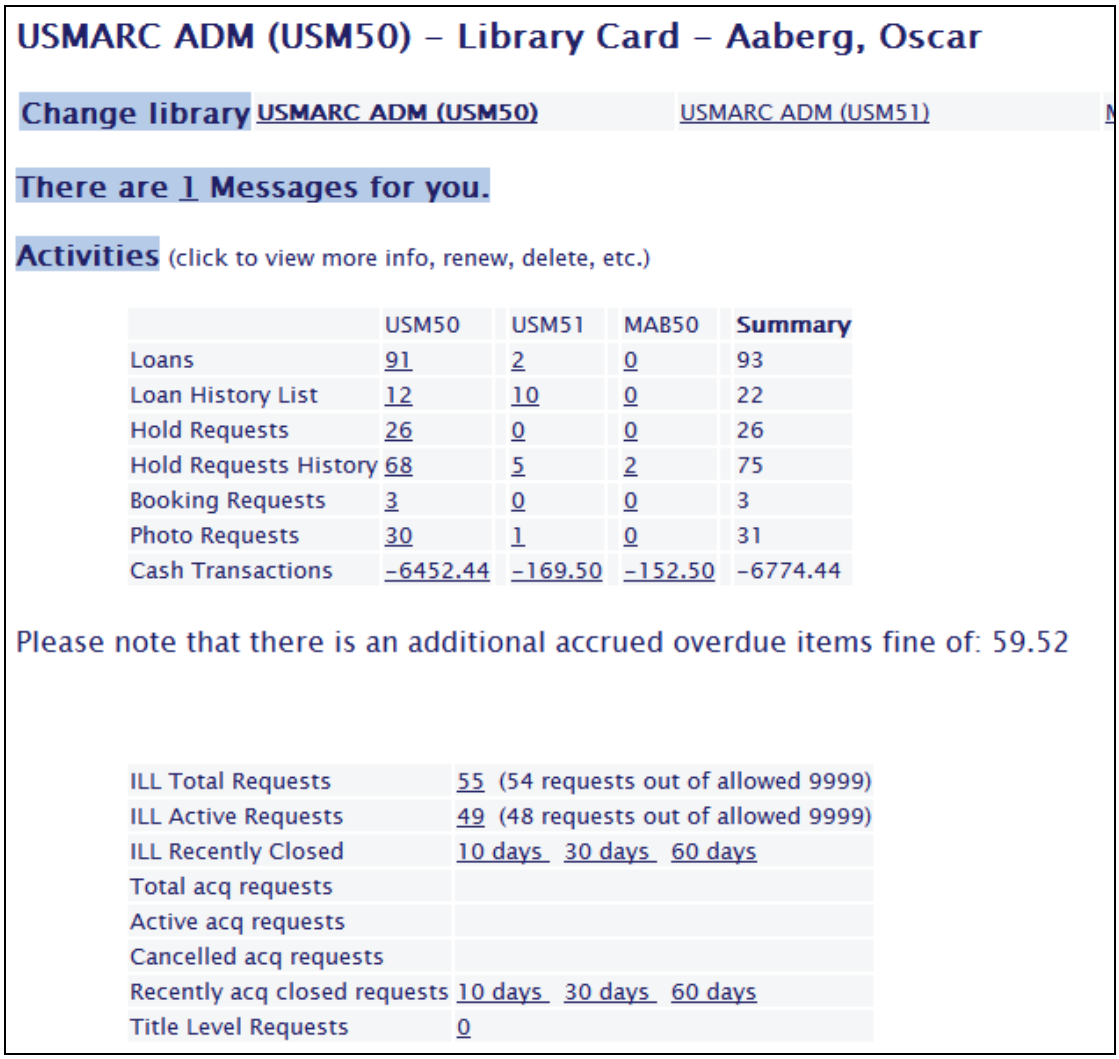
8.1 Change Library

When the library defined has a multi-ADM library setup (that is, a group of Administrative Libraries, although completely separate, serve a common set of patrons), the patron has the option of viewing and working with another ADM library:

If there is no multi-ADM setup, the Change Library link does not appear.

8.2 Activities

The Activities area of the patron's Library Card lets him view statistical information concerning all his library activities at a glance:



USMARC ADM (USM50) – Library Card – Aaberg, Oscar

Change library USMARC ADM (USM50) USMARC ADM (USM51)

There are 1 Messages for you.

Activities (click to view more info, renew, delete, etc.)

	USM50	USM51	MAB50	Summary
Loans	91	2	0	93
Loan History List	12	10	0	22
Hold Requests	26	0	0	26
Hold Requests History	68	5	2	75
Booking Requests	3	0	0	3
Photo Requests	30	1	0	31
Cash Transactions	-6452.44	-169.50	-152.50	-6774.44

Please note that there is an additional accrued overdue items fine of: 59.52

ILL Total Requests	55 (54 requests out of allowed 9999)
ILL Active Requests	49 (48 requests out of allowed 9999)
ILL Recently Closed	10 days 30 days 60 days
Total acq requests	
Active acq requests	
Cancelled acq requests	
Recently acq closed requests	10 days 30 days 60 days
Title Level Requests	0

The activity table displays the patron's activities in all of the ADM libraries in which the patron is active. A separate column summarizes the number of actions of this activity type in all ADM libraries. For example, the number of loans in each ADM is displayed next to Loans. To receive more detailed information regarding a particular activity in a particular ADM, the patron clicks the related hyperlink, and an expand window appears. Note that each expand window contains an options bar containing the other available options and an option to view the same activity type in another ADM, as is shown in the examples below.

Note that the availability of the options described below is dependent on library policy and setup.

Loans

When a patron clicks **Loans**, the Items on Loan screen is displayed:

User Info | Loans | Hold Requests | Booking Requests | Photo Request | History Loans | Renew All | Renew Selected
Cash Transactions | ILL Request Acq Request | | Title Request | Proxies/Sponsor | Save/Mail

Franklin Coll. Lib - Items on Loan for: Irina Di

Assoc. Menn. B. Sem. - 1 DePauw Library - 2 Franklin Coll. Lib - 5

Total sum of accrued fines: 12.00

For details about a loan, click on the underlined number.

No.		Author	Description	Year	Due date	Due hour	Fine	Sublibrary	Location	2nd Location	Item Desc	SFX	Number of Renewals
1	☐		Contemporary American philosophy : personal statements / edited by George P. Adams and Wm. Pepperell	1930	18/February/2009	11:59 PM		Franklin College Library	191 C76		v. 1 c.1		0 (out of 3).No limit on latest due date.
2	☐	Searls, Hank, 1922-	The lost prince: young Joe, the forgotten Kennedy; : the story of the oldest brother, / by Hank Sear	1969	Lost		3.00	Franklin College Library	973.91 Se17L		c.1		0 (out of 3).No limit on latest due date.
3	☐	Fisher, Arthur, 1931-	The healthy heart / by Arthur Fisher and the editors of Time-Life Books.	1981	06/January/2009	09:00 PM	3.00	Franklin College Library	616.12 F531h		c.1		1 (out of 3).No limit on latest due date.
4	☐		Uncataloged item Franklin CR10	2000	06/January/2009	05:00 PM	3.00	Franklin College Library	CR10				0 (out of 1).No limit on latest due date.
5	☐		Uncataloged item Franklin DVDRemote	2000	06/January/2009	05:00 PM	3.00	Franklin College Library	DVDRemote				0 (out of 1).No limit on latest due date.

From here, a patron can view Due Date, Due Hour, and so on, according to the library setup. By clicking the underlined number on the left of a row, a patron can view expanded details on a loan. If there is an option to renew the loan, a Renew link appears. The patron can also choose to view loans in another ADM, as well as view other activities within the currently displayed ADM, by using the links at the top of the page.

Clicking **Renew All** from the options bar of the Items on Loan screen enables the patron to renew all items that he has on loan. If some items have not been renewed, he will receive a report of the items which were not renewed followed by the items which were renewed so that the total number of items (not renewed and renewed) will be the number of all the items loaned by the patron. Information explaining why a certain item was not renewed appears in the *Reason for non-renewal* column.

A patron may want to renew several loans only. To do this, he needs to select the check boxes of the items to be renewed and click **Renew Selected**. If some items have not been renewed, he will receive a report of items which were not renewed followed by a report listing the items which were renewed. The total number of items (not renewed and renewed) appearing in the report will be all of the items selected for being renewed.

Sometimes, items are not renewed for the whole renewal period. If an item has been renewed, but not for the whole period, a message appears in the "Due Date" column of the renewed items section, stating: *Renewal for the full loan period is not possible. New due date has been set to dd/mm/yy.*

The message will not specify why the item was not renewed for the entire period.

No.	Description	Item status	Due date	Due hour	Sublibrary	Barcode	Item Desc
5	The riddle of cancer /	Regular loan	Renewal for the full loan period is not possible. New due date has been set to 24/06/05	24:00	Medicine Library	32044020921318	

The patron can also save/mail from the ‘Loans’ screen. The save/mail interface includes encoding and information required for e-mail submission. All records in the ‘Loans’ list will be included in the output.

Loan History List

A patron clicks Loan History to view a list of previous loans. The loans are sorted by due dates, in descending chronological order.

The patron can also save/mail from the 'Booking Request' screen. The save/mail interface includes encoding and information required for e-mail submissions. All records in the 'Loan History List' list will be included in the output.

Hold Requests

A patron clicks Hold Requests to view a list of items that he has requested:

User Info | Loans | Hold Requests | Booking Requests | Photo Request | History Loans
Cash Transactions | ILL Request | Title Request | Proxies/Sponsor | Save/Mail

USMARC ADM (USM50) - Hold Requests for: Aaberg, Oscar

Change library USMARC ADM (USM50) - 15 USMARC ADM (USM51) - 0

For details about a hold request, click the underlined number.

No.	Author	Description	Year	Request date	End request date	Hold date	Sublibrary	Request status	Call number	Call number 2	Item Description	Pickup Location	Item Status	Group ID	SFX	Note 1	Note 2
1	American Chemical Society.	Journal of the American Chemical Society.	1879	23/03/06	23/05/06		East Asian Library	Waiting in position in queue; current due date 09/05/06	GEN1.23.66		Vol 15 1995	East Asian Library	Regular loan	0	SFX		

By clicking the underlined number on the left of a row, he can view expanded details on a hold request. If the request can be deleted, a Delete link is activated. An option to view the patron's hold requests in other ADM libraries is also given, as well as links for viewing other activities in the presently shown ADM.

Hold Requests History

A patron clicks Hold Requests to view a list of items that he has requested:

User Info | Loans | Hold Requests | Booking Requests | Photo Request | History Loans | History Hold Requests
Cash Transactions | ILL Request | Acq Request | Title Request | Proxies/Sponsor | Save/Mail

USMARC ADM (USM50) – Hold Requests on History List for: Aaberg, Oscar

USMARC ADM (USM50) – 68 USMARC ADM (USM51) – 5 MAB ADM (MAB50) – 2

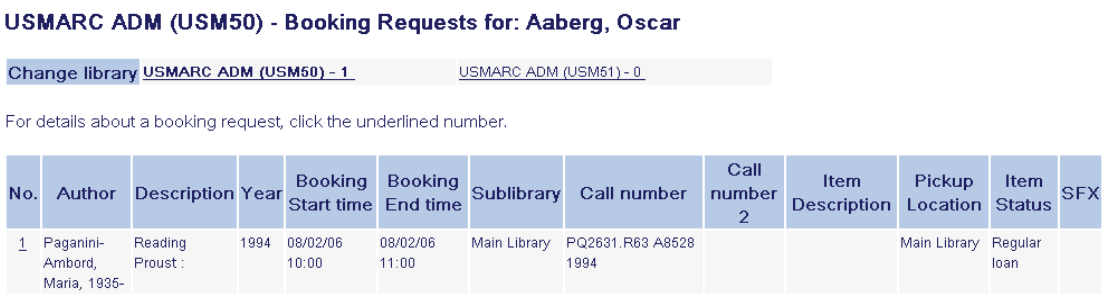
For details about a hold request, click the underlined number.

No.	Author	Description	Year	History Date	Request date	End request date	Hold date	Sublibrary	Call number	Pickup Location	Item Status	Note 1
1	Knight, William Allen, 1863–1957.	On the way to Bethlehem /	1912	12/09/11	10/08/11	30/08/12		Medicine Library		Medicine Library	Regular loan	12234 0001

By clicking the underlined number on the left side of a row, he can view expanded details of an historical hold request. An option to view the patron's hold requests history in other ADM libraries is also available, as well as links for viewing other activities in the displayed ADM.

Booking Requests

A patron clicks Booking Requests to view a list of items that he has requested:



USMARC ADM (USM50) - Booking Requests for: Aaberg, Oscar

Change library USMARC ADM (USM50) - 1 USMARC ADM (USM51) - 0

For details about a booking request, click the underlined number.

No.	Author	Description	Year	Booking Start time	Booking End time	Sublibrary	Call number	Call number 2	Item Description	Pickup Location	Item Status	SFX
1	Paganini-Ambord, Maria, 1935-	Reading Proust :	1994	08/02/06 10:00	08/02/06 11:00	Main Library	PQ2631.R63 A8528 1994			Main Library	Regular loan	

By clicking the underlined number on the left of a row, he can view expanded details on a booking request. If the request can be deleted, a Delete link is activated. An option to view the patron's booking requests in other ADM libraries is also given, as well as links for viewing other activities in the presently shown ADM.

Note that Advance Booking requests are also viewable in this part of the library card.

The patron can also save/mail from the 'Booking Request' screen. The save/mail interface includes encoding and information required for e-mail submissions. All records in the 'Booking Request' list will be included in the output.

Photo Request

A patron clicks Photo Requests to view a list of his photocopy requests:

USMARC ADM (USM51) - Photocopy Requests for : Aaberg, Oscar

Change library USMARC ADM (USM50) - 0 USMARC ADM (USM51) - 1

For details about a photocopy request, click on the underlined number.

No.	Author	Description	Year	Date	Status	SubLibrary	Location	Location 2	Item Description
1	Proust, Marcel, 1871-1922.	A la recherche du temps perdu /	1977	08/11/04	Waiting	Education Library 51			

By clicking the underlined number on the left of a row, he can view expanded details on a photocopy request. If the request can be deleted, a Delete link is activated. An option to view the patron's photocopy requests in other ADM libraries is also given, as well as links for viewing other activities in the presently shown ADM.

The patron can also save/mail from the 'Booking Request' screen. The save/mail interface includes encoding and information required for e-mail submission. All records in the 'Photo Request' list will be included in the output.

Cash Transactions

A patron clicks Cash Transactions to view information about his fines and other cash transactions (arranged by sublibrary if permitted by the library setup):

User Info | Loans | Hold Requests | Booking Requests | Photo Request | History Loans
Cash Transactions | ILL Request | Acq Request | Title Request | Proxies/Sponsor | Save/Mail

Franklin Coll. Lib - Cash Transactions (Irina Di)

Assoc. Menn. B. Sem. : 0.00 DePauw Library : -53.50 Franklin Coll. Lib : -58.10

The accrued fine for overdue items is: 12.00

Sublibrary	Balance	Transferred to Accounts Receivable
Franklin College Library	- 58.10	0.00
Total:	- 58.10	0.00

For details about a transaction, click on the underlined number. (All transactions are **UNPAID** transactions).

No.	Author	Bibliographic Info	Year	Description	Credit	Debit	Date	Status
1	Searls, Hank, 1922-	The lost prince: young Joe, the forgotten Kennedy; : the story of the oldest brother, / by Hank Sear	1969	Lost item -Processing fee		8.00	14/January/2009	Not paid
2			1969	Lost item -Replacement charge		50.00	14/January/2009	Not paid
3	Emery, Robert E.	Marriage, divorce, and children's adjustment / Robert E. Emery.	1988	Overdue fine <0001 0000 4 .10>		0.10	07/January/2009	Not paid

By clicking the underlined number on the left of a row, he can view expanded details on a cash transaction. The patron can also view his cash transactions that are registered in other ADM libraries than the one currently displayed.

If several cash transactions have been made on items of the same Bibliographic record, the Bibliographic information will appear only once in the first line.

The patron can also save/mail from the ‘Booking Request’ screen. The save/mail interface includes encoding and information required for e-mail submissions. All records in the ‘Cash Transactions’ list is included in the output. Note that the sum of the accrued overdue fines that have been charged so far is displayed at the top of the cash charges list.

Blocks

The Blocks field on the Library Card contains information concerning a patron's non-compliance with library regulations, possibly including sanctions Imposed. For example, a patron may be prohibited from checking out materials from a library, usually because of overdue items or unpaid fines. Most online circulation systems are designed to automatically block patron functions under circumstances prescribed by the library. In ALEPH, blocks and comments are added via the Patron Information screen in the Circulation module.

ILL Total Requests

ILL Total Requests shows the total number of Interlibrary Loan requests that a patron has made. Patrons can click ILL Total Requests to view information about all the ILL requests they have made. By clicking the underlined number on the left of a row, they can view expanded details on an ILL request. The expand details window also allows the patron to cancel ILL requests with the status of NEW, UNF (unfilled), or WAP (waiting for processing). Note that the Library Card also displays how many of the ILL requests are discounted from the patron’s current ILL quota, and what that quota is.

ILL Active Requests

ILL Active Requests provides information on and specifies the number of ILL requests active at any one time. Patrons can click ILL Active Requests to view information about their active ILL requests. By clicking the underlined number on the left of a row, they can view expanded details on an ILL request. The expand details window also allows the patron to cancel ILL requests with the status of NEW or WAP (waiting for processing). Note that the Library Card also displays how many of the active requests are discounted from the patron’s current ILL quota, and what that quota is.

Total ACQ Requests

Number of all orders initiated by/for the patron.

Active ACQ Requests

Number of orders initiated by/for the patron whose status is not “Closed” or "Library Cancelled".

Cancelled ACQ Requests

Orders initiated by/for the patron with “Library Cancelled” status (rejected requests).

Recently Closed ACQ Requests

Orders initiated by/for the patron with “Closed” status. This section is divided by the number of days in which the orders are already closed.

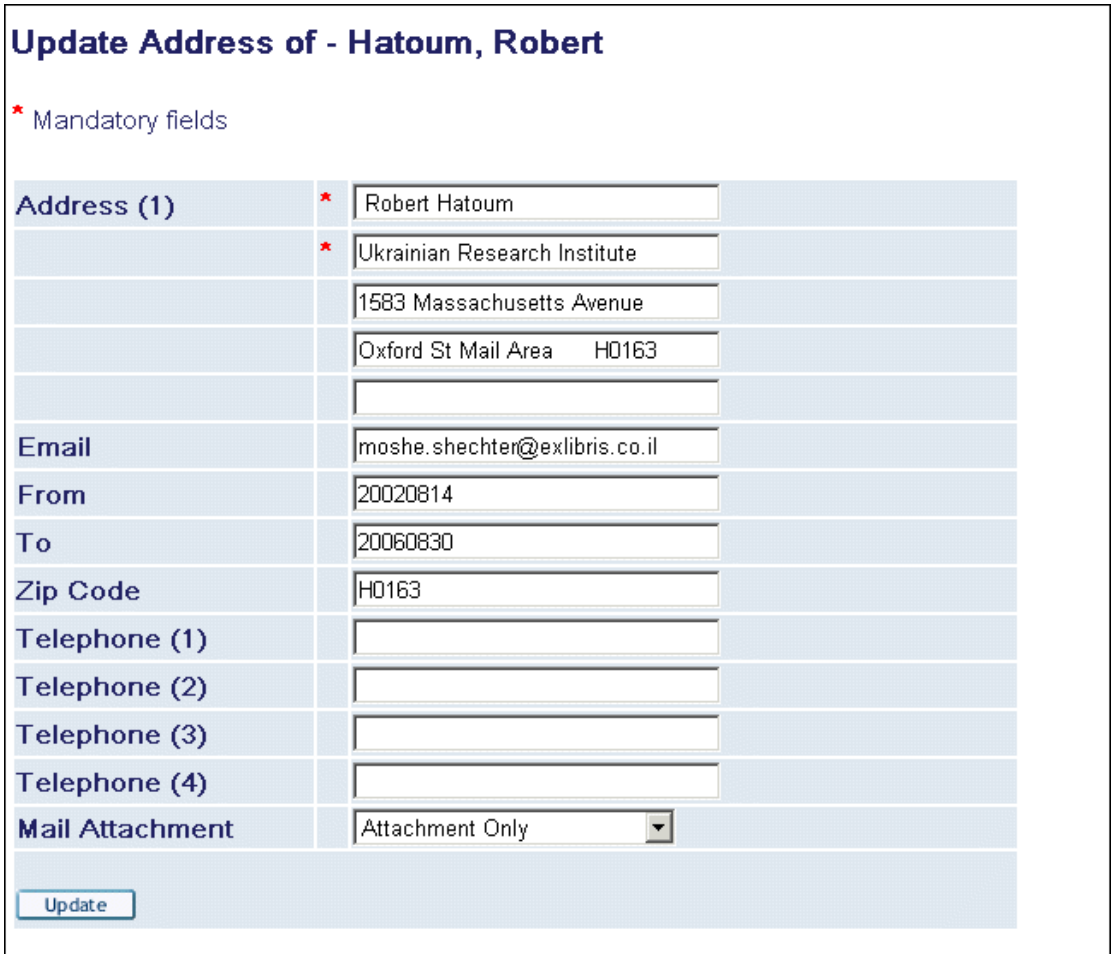
Title Level Requests
Title Level Requests provides information regarding patron's title level hold requests. As such requests are not placed on items and can be fulfilled by any institution, the requests are not shown in the general activities table. Instead, title level request information and status is displayed in this section only.

The patron can also save/mail from the 'Booking Request' screen. The save/mail interface includes encoding and information required for e-mail submission. All records in the 'Title Level Requests' list will be included in the output.

8.3 Updating Addresses

This option enables patrons to update their address record through the Web OPAC, if the library allows them to do this.

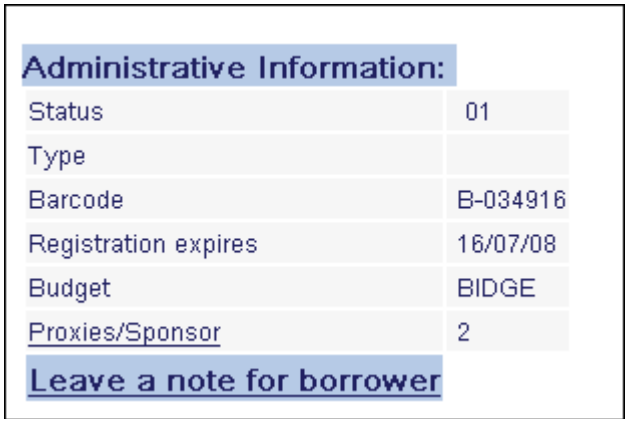
Patrons click the Update Address link in their Library Card in order to activate the Update Address form:



After they have typed in their new details, they click **Modify** and their address record is automatically updated.

8.4 Administrative Information

The information contained in this section is for display purposes, and can only be modified from the Global Information Form in the Circulation module:



Administrative Information:

Status	01
Type	
Barcode	B-034916
Registration expires	16/07/08
Budget	BIDGE
Proxies/Sponsor	2

Leave a note for borrower

Other than the patron's global status information, the following global information is also displayed:

Proxies / Sponsor

In the standard library system, each patron is able to borrow items for himself but not for anyone else. However, in more complex systems, the library may allow a patron to borrow items for someone else who acts as his sponsor. For example, a teaching assistant may be able to borrow items for sponsoring professors.

Patrons can click **Proxies / Sponsor** to view details of their proxies and sponsors.

8.5 Messages

To send a note to another patron, patrons can click **Leave a Note for Patron**. To use this option, the patron needs to know the other patron's ID.

If a patron has messages awaiting pickup, a notice appears: "You have *n* message(s)." To access messages, the patron clicks the underlined number.

8.6 Personal Profile

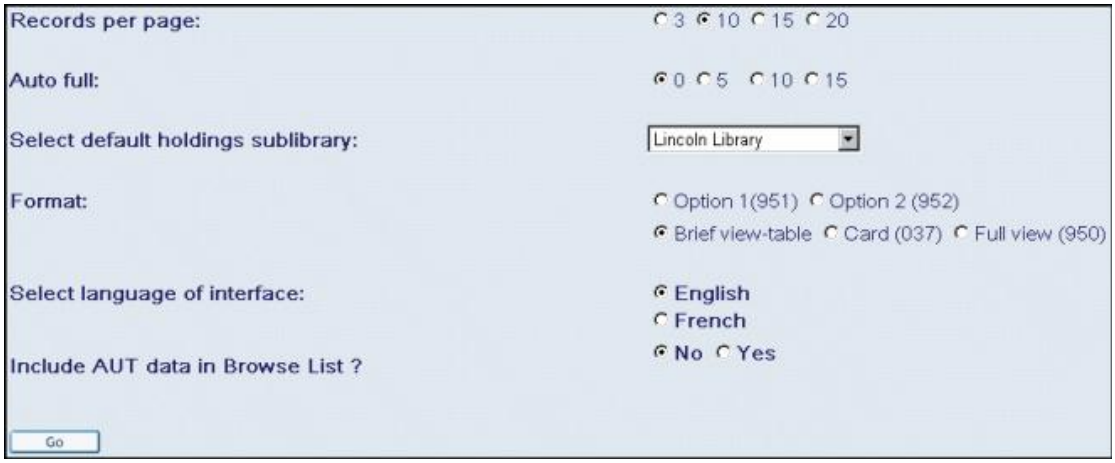
Patrons can define the following in the Personal Profile window:

- Number of records displayed per page.
- Minimum number of records in set for automatic jump to full display.
- Preferred short display format.
- Preferred sublibrary for searching.
- Preferred language of interface.

The first three options listed above can also be set in Preferences.

Defining a Personal Profile

From their Library Card, a patron clicks Personal Profile. The Personal Profile window is displayed:



The patron selects his preferences and clicks **OK**. His updated personal preferences are entered into Web OPAC.

When a patron logs into the Web OPAC, the system looks for his personal profile. There are three possible outcomes:

Web OPAC locates his personal profile, created in the Web OPAC Patron Information section.

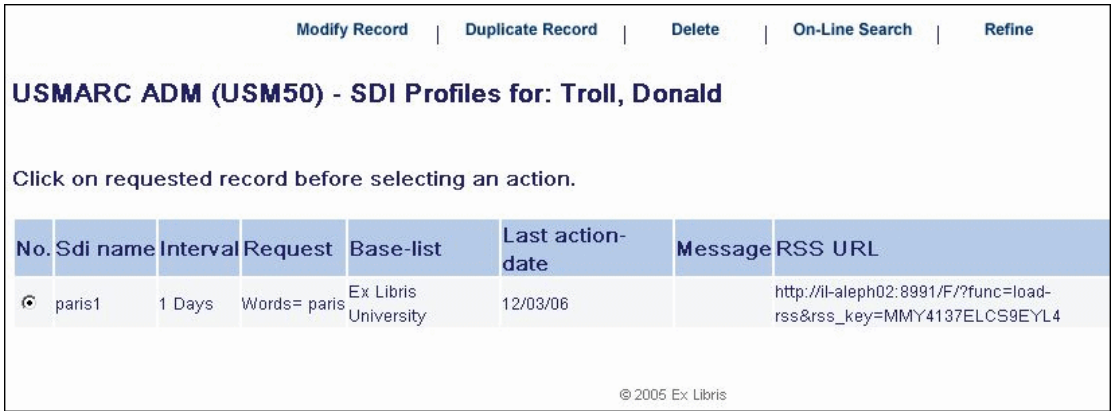
Web OPAC does not locate his personal profile, and checks if an IP station profile is defined for the station he is using.

Web OPAC does not locate his personal profile, and does not locate an IP station profile defined for the station he is using. Web OPAC then uses the default (ALEPH) profile.

8.7 SDI Profiles

This option only appears if the patron has SDI permission in his profile.

Clicking SDI Profiles invokes a list of the patron's SDI Profiles:



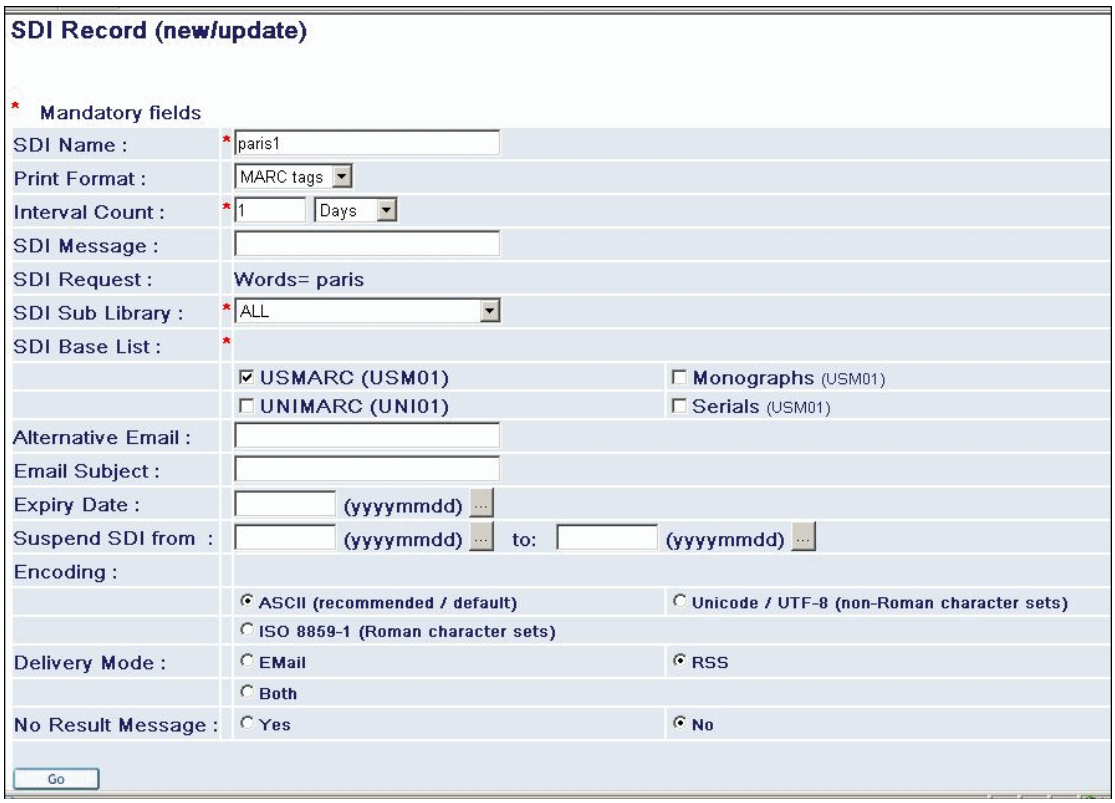
The SDI Profile screen displays all the SDI profiles already set up by the patron. SDI requests can also be typed in CCL (Common Command Language). If the delivery

mode for a specific SDI profile is set to "RSS" or "Both", the SDI Profile screen will contain an RSS URL column. The corresponding URL should be copied by the patron into the RSS viewer.

The SDI Profile screen also offers the following options:

Modify

Clicking **Modify** invokes the SDI Record (new/update) window:



From this window, a patron can either modify an existing SDI profile or add a new one.

Duplicate

Clicking **Duplicate** invokes an SDI Record (new/update) window displaying details of a patron's selected SDI profile.

Delete

Deletes a record. Clicking **Delete** invokes the Delete box. A patron clicks OK to delete or clicks Close to cancel.

Online Search

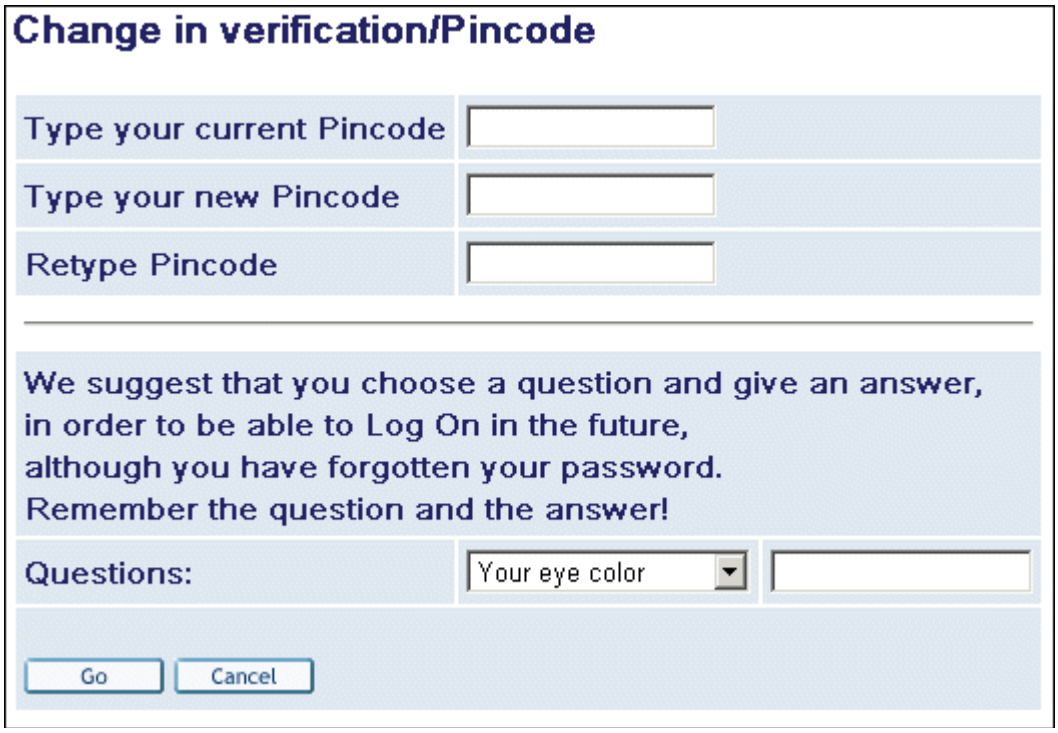
Clicking **Online Search** executes the selected SDI request in real time. No SDI letter will be sent to the patron regarding items found in the online search.

Refine

This option lets patrons refine their existing SDI search. Clicking on **Refine** opens a standard Refine page:

8.8 Password

This option enables a patron to change his patron verification (password, PIN code, and so on). Clicking Password invokes the following screen:



The patron fills in the fields as required and clicks **Go**. His profile is updated with his new user verification.

9 ILL (Interlibrary Loan)

When a book or other item needed by a patron is checked out, unavailable for some other reason, or not owned by the library, the patron can request that it be borrowed from another library by filling out an ILL Request form via Web OPAC. Materials borrowed on interlibrary loan can usually be renewed on or before the due date. Interlibrary loan is a form of resource sharing that depends on union catalogs.

The patron can choose whether he prefers to receive the material by loan or by photocopy. This option is only available for a patron who has signed in to the Web OPAC.

9.1 Placing ILL Requests

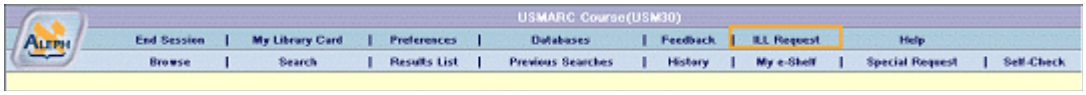
There are two ways that ILL Requests can be placed via the Web OPAC:

Via the menu bar, OR

Via the Full view of a record.

Placing an ILL Request from the Menu Bar

From the menu bar, the patron clicks **ILL Request**.

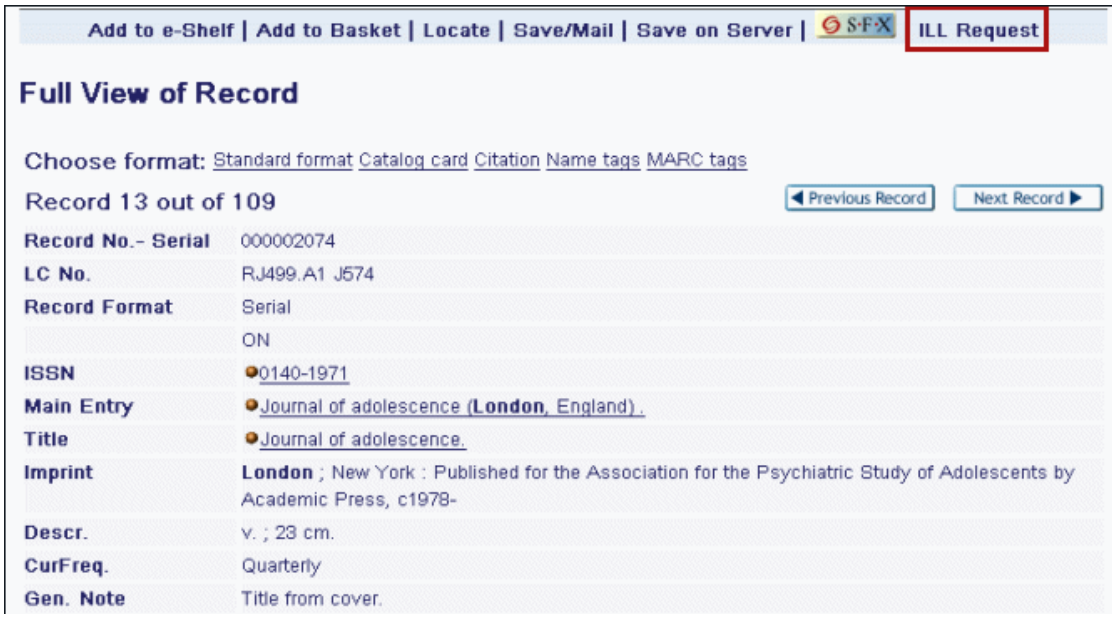


The ILL Request form appears:

The patron fills in as much information as possible, then clicks **Go**. This sends the ILL request to the library for processing.

Placing an ILL Request from the Full View

From the Full view, the patron clicks **ILL Request**:



The ILL Request Form is displayed.

The patron fills in as much information as possible, then clicks **Go**. This sends the ILL request to the library for processing.

There are two different types of requests. Each type has a specific form which the patron accesses by clicking the relevant link at the top of the request form window:

Book - this is the default window

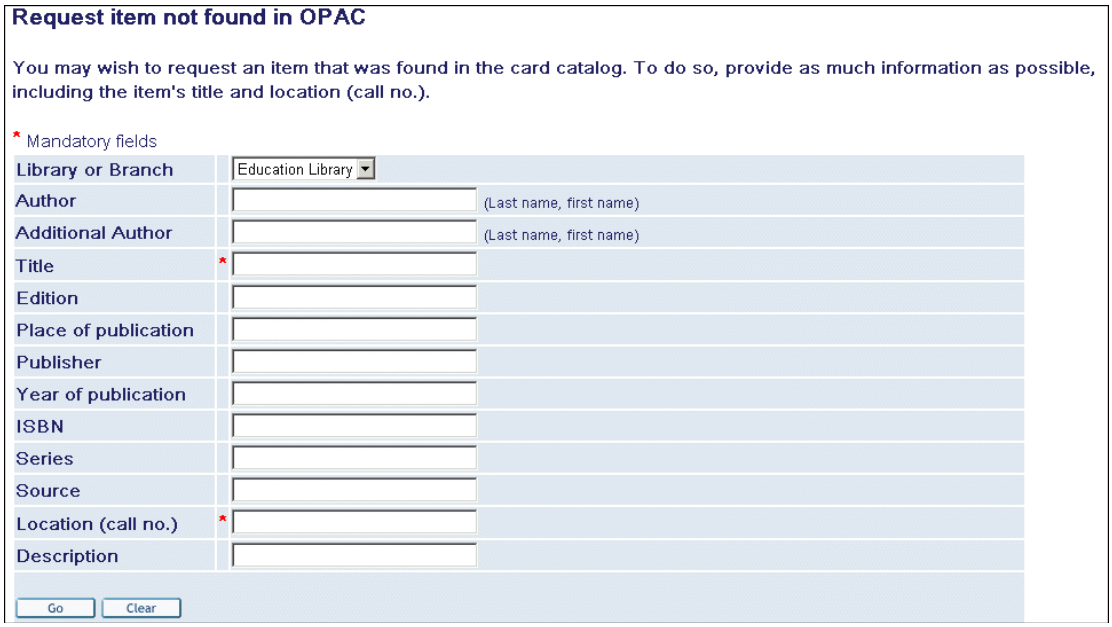
Journal

10 Special Request

The Special Request function lets the patron place special requests for items that are not found in the Web OPAC, but that are listed in the card catalog. The link for making a special request is displayed in the menu bar if the patron's patron profile includes permission for placing a special request. The library processes the request, that is, fetches the item and delivers it to the patron if it is available.

10.1 Making a Special Request

From the menu bar, the patron clicks **Special Request**. The Special Request form is displayed:



The patron fills in as much information as possible, including the item's title and call number, and clicks **Go**.

Note that the link only appears if permission for Special Requests is defined in the patron's profile.

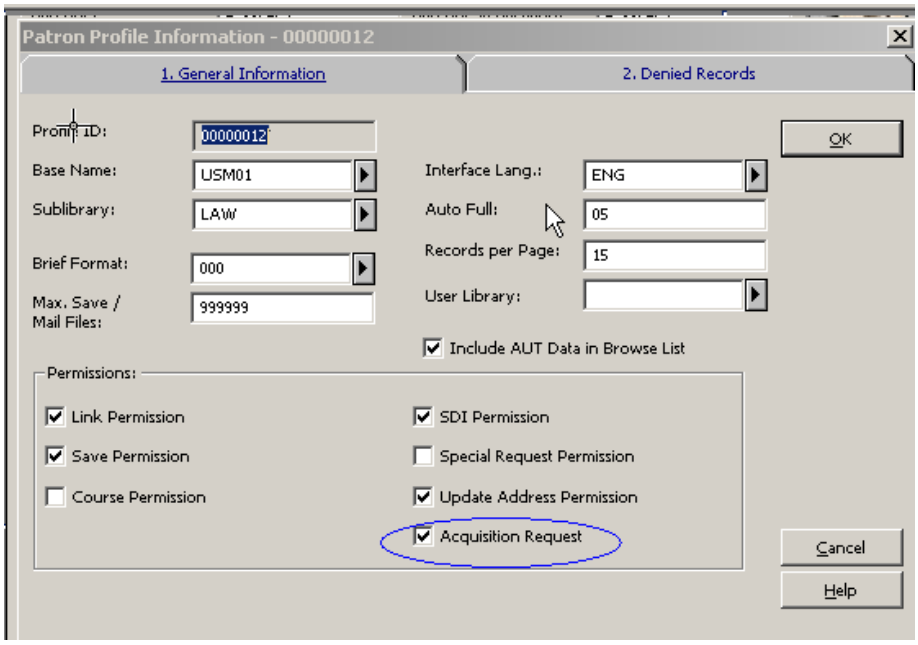
11 ACQ Request from Web OPAC

The Web OPAC allows the submitting of an acquisition request from the library Web OPAC interface.

11.1 Prerequisites for Patron Record

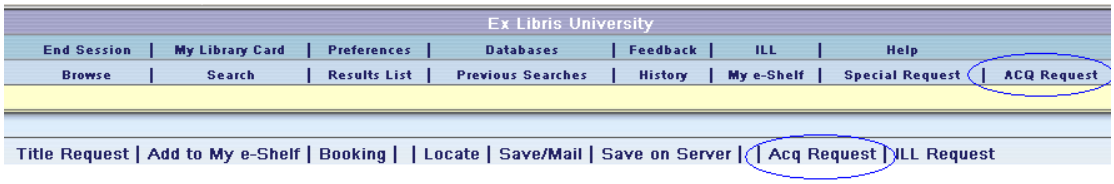
In order to allow a patron to submit an ACQ request via the OPAC, the patron must have the followings settings in the patron record:

- Acquisition Request permission in the patron's profile record (see figure below).
- Patron Home Library must be populated with a valid sublibrary code.



11.2 Submitting an ACQ Request

An ACQ Request can be submitted by a patron who is signed in by using one of the ACQ Request links available in the Web OPAC:



:

- **ACQ Request link from the upper bar menu** – Opens a blank ACQ Request form. This link should be used when the patron wishes to request a non-periodical item that was not found in the online catalog or is missing from the shelf. The patron must provide as much information as possible, including the item's BIB information and the reason for requesting this material.

- **ACQ Request link at the lower pane menu** – Available in the Full View of a document. This feature is used by a patron who has performed a search in the local or external database, found the material in question, and decides to submit an acquisition request for the found title. An ACQ Request form is opened with the BIB information already populated in the form. The patron then fills in the reason for requesting the material.

Note:

1) An ACQ Request can also be submitted through MetaLib and use SFX to connect directly to the services of the Aleph Web OPAC using PDS (SSO - Single Sign On).

2) For a library which has more than one BIB library, there is an option to configure the OPAC Acquisitions Confirmation page so that the patron can select the BIB

library in which the BIB record will be created. The locate procedure will be activated at the selected BIB library. For set up details, refers to the *System Librarian's Guide-Web OPAC*.

11.3 Local Own Check Procedure

Once the ACQ request form is submitted, the system activates the "locate similar record in local database" function for blank ACQ requests and for titles found in an external base. This function is inactive for titles found in a local base. The base that is used for this locate action is the BIB library where the ACQ request's BIB document is about to be created.

The ACQ request BIB document is created in the BIB library to which the patron's ADM library is attached. For a library with more than a single BIB library, there is an option to adjust the OPAC HTML ACQ requests page so that the patron picks the desired BIB library in which the ACQ request and locate action are placed. For more information, refer to the **ACQ Request for Library with more than One BIB Library** section of the *System Librarian's Guide – Web OPAC*.

The 'locate similar title' function that is activated for blank ACQ requests and requests made for titles found in an external base, can result in one of the following:

- **If the title is not found in the local base** – A confirmation message is displayed, "ACQ Request was submitted successfully".

- **If the title is found in the local base** – A message is pop-up informing the patron that a match title has been found in the local database. The patron is required to click **Go** or **Cancel**. If **Cancel** is clicked, the ACQ Request is not registered and the action is aborted. If **Go** is clicked, a confirmation message is displayed, "ACQ Request was submitted successfully".

- **If multiple matching records are found for the requested title** – All found titles are listed and the following message is displayed, "Multiple matching records were found for your query. Select desired record and submit ACQ request". The ACQ request is not registered. The patron is expected to select a specific title and re-submit the ACQ request.

Once an ACQ Request is successfully submitted, the system creates a new order record for the requested title. If there are existing BIB and ADM records for the title, the system appends their order record. If there are no BIB or ADM records for the title, the system creates a new BIB/ADM record. For more information, refer to the **Applying ADM Filter in OPAC-ACQ Request** section of the *System Librarian's Guide – Web OPAC*.

The newly created order is populated with the followings information:

- Order status - OPAC New Order (ONW)
- The patron's home library is set in the order's sublibrary field.
- The patron that submitted the ACQ Request is registered in the order's Initiator ID field.
- The GUI-ACQ-OPAC Request List enables the retrieving and handling of ACQ requests (orders with ONW status). The ONW orders are initially

created with minimum information. The orders lack information (like Vendor details). Staff users are expected to review those orders, verify them, and process the order.

- If a new BIB record is created as part of submitting an ACQ request using the blank ACQ Request form, it is assigned with STA$$aSUPPRESSED so that it is not displayed in the general Web OPAC catalog.

11.4 Web OPAC – Patron's Library Card

The Web OPAC library card reports the patron ACQ Requests. It includes orders initiated by the patron via WEB OPAC and orders initiated by staff via the GUI on behalf of the patron (the patron ID is populated in the order's Initiator ID).

There are four relevant entries for ACQ Requests in Web OPAC library card:

- **Total ACQ Requests** – Number of all orders initiated by/for the patron.
- **Active ACQ Requests** – Number of orders initiated by/for the patron whose status is not “Closed” or "Library Cancelled".
- **Cancelled ACQ Requests –** Orders initiated by/for the patron with “Library Cancelled” status (rejected requests).
- **Recently Closed ACQ Requests** – Orders initiated by/for the patron with “Closed” status. This section is divided by the number of days in which the orders are already closed.

Each of the above entries links to the list of orders. Each line in the list enables the viewing of the details of each order.

12 My e-Shelf

The My e-Shelf function is available for both identified patrons and guest users. My e-Shelf acts as a storage area for retrieved records from local or external databases that have been selected to be set aside and managed in folders.

Records and folders are available for a guest user as long he is logged in, and emptied automatically when the current session is ended. When a guest clicks **Add to My e-Shelf** from the options bar or **My e-Shelf** from the menu bar, he is prompted by a

message informing him that records and folders have been added to My e-Shelf and will be deleted at the end of the current session:

If a guest signs in after uploading records into “My e-Shelf”, the records in the temporary E-Shelf are copied to the e-Shelf of the signed-in Patron. The names of folders created by the guest are preceded by TMP after the patron signs in.

Folders generated by a patron and the records stored in each of the folders can only be deleted by the patron himself.

Records can be added to the My e-Shelf function from the OPAC brief view list or from the record’s full display, by clicking **Add to My e-Shelf** from the options bar.

Depending on the permission defined in the patron's or guest’s profile and on the library setup, the selected records in the e-Shelf can be:

- Saved on the local PC
- Saved on the server
- Sent by e-mail to a specified address
- Sent by e-mail to the Course Reading Administration in order to inform them about new records needed for courses.
- Printed out

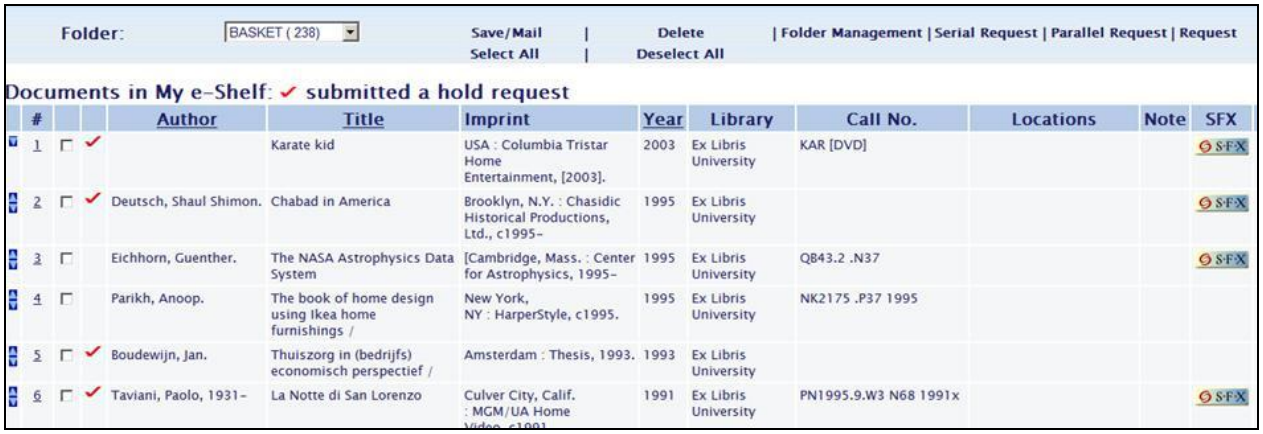
Records in the My e-Shelf function are managed in folders. Each folder (including the BASKET folder) can contain a maximum of 500 records, depending on how your System Librarian has set up the system.

There is no limit on the number of folders that a patron or guest can create and manage.

12.1 Viewing the e-Shelf

To view an e-Shelf:

1. From the menu bar, the patron or guest clicks **My e-Shelf**. The Documents in My e-Shelf are displayed in a brief view:



2. The patron or guest selects a folder from the drop-down list of the folder field to display the records that are stored in that folder:

The patron or guest can also view the records in full format.

Records can be sorted by Author Title and Year.

From the brief view, the following options are available on the option bar:

- Delete
- Save/Mail
- Folder management

12.1.1 Deleting Records

Select the records you want to delete from My e-Shelf and click **Delete** from the option bar.

12.2 Saving and Mailing Records

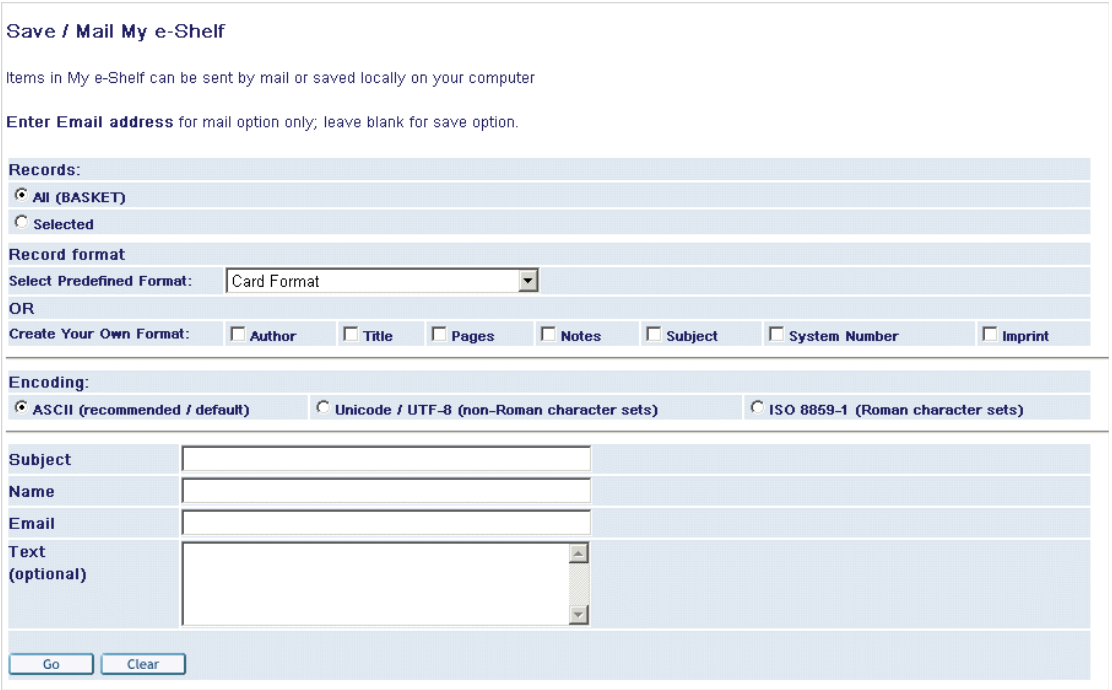
This option is available for both patrons and guests.

ALEPH lets patrons and guests save records locally on their PCs and/or send them via e-mail.

Other options such as saving records on server and notifying Course Reading administration about new records needed for courses require specific permission.

12.2.1 Saving a Record on a Local PC

1. From the **Documents in My e-Shelf**, window, the patron or guest clicks **Save/Mail** on the option bar. The **Save / Mail My e-Shelf** form appears:



2. The patron or guest fills in the relevant details, without typing an e-mail address or filling in the optional text, and clicks **Go**.

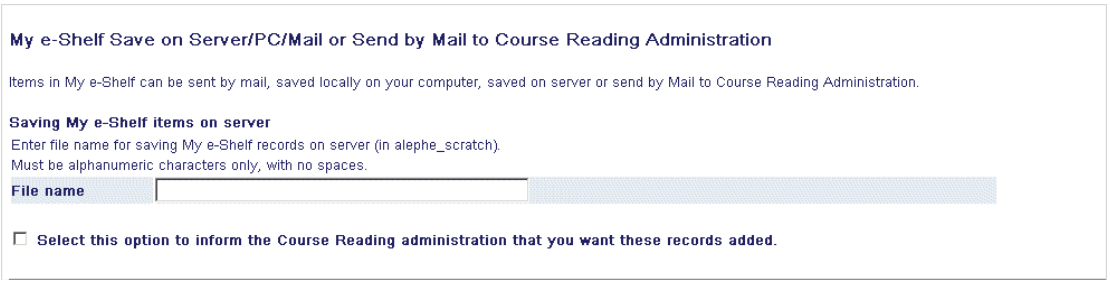
12.2.2 Sending a Record by E-Mail

1. From the **Documents in My e-Shelf** window, the patron or guest clicks **Save/Mail**. The **Save / Mail My e-Shelf** form appears.
2. The patron or guest fills in the relevant details, including the destination e-mail address, and clicks Go. The patron or guest can also add a textual note to be included in the e-mail message.

12.2.3 Saving a Record on the Server

This option is only available to patrons with Save permission defined in their patron profile.

1. From the **Documents in My e-Shelf** window, the patron clicks **Save/Mail**. The **My e-Shelf Save on Server/PC/Mail or Send by Mail to Course Reading Administration** form appears:



2. The patron types in a file name and clicks **Go**. The record is saved to the server. It can be found later in the `alephe_scratch` directory or any other directory defined in `aleph_start`.

12.2.4 Sending Records to the Course Reading Administration

This option is only available to patrons with Course Reading permission defined in their patron profile.

1. From the Documents in My e-Shelf window, the patron clicks Save/Mail. The My e-Shelf Save on Server/PC/Mail or Send by Mail to Course Reading Administration form appears.
2. The patron types a file name, selects the relevant option in order to inform Course Reading administration about new records needed for a course, and clicks Go.

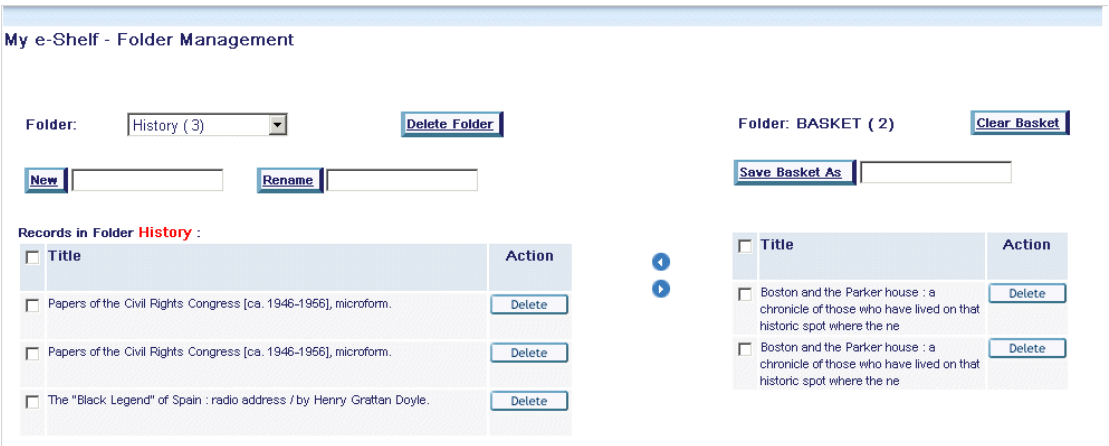
12.3 Folder Management

This option is available for both patrons and guests and allows them to handle and maintain records and folders.

The maximum number of records in a folder (including the BASKET folder) is defined by your system librarian.

There is no limit on the number of folders that a patron or guest can create and manage.

From the **Documents in My e-Shelf** window, the patron or guest clicks **Folder Management**. The **My e-Shelf –Folder Management** form appears:



12.3.1 Using the Basket Folder

The BASKET folder appears on the right of the **My e-Shelf –Folder Management** form. This is a default folder generated when the patron or guest clicks **Add to My e-Shelf** for the first time. The records selected to be stored in the e-Shelf are primarily saved to this folder.

When a guest's session ends, this folder, and the documents stored in it, are deleted.

When a patron's session ends, this folder, and the documents stored in it, are retained.

The available options for the BASKET folder are:

- **Clear Basket -** Clears all the records contained in the BASKET folder
- **Save Basket As -** Saves all the records stored in the BASKET to a new generated folder

12.3.2 Moving Records

Navigation arrows are displayed on the **My e-Shelf - Folder Management**" window. These navigation arrows are used to:

- Move selected records stored in the BASKET folder to any of the folders displayed in the left hand side of the window.
- Move selected records in any of the folders displayed in the left hand side of the window to the BASKET folder.

In order to move records from folder to folder:

The records should first be moved from the folder to the BASKET, then from the BASKET to the new folder (selected from the list in the folder field at the left of the **My e-Shelf - Folder Management** window).

12.3.3 Other Folders

Folders generated by patrons or guests are displayed at the left of the **My e-Shelf - Folder Management** window:

The available functions are:

- **New** - Creates a new folder.
- **Rename** - Renames an existing folder.

> **Note**
>
> The folder name can include all kinds of characters, such as alphanumeric characters, CJK characters, Arabic characters, etc. Folder names that contain single quotes (') and double quotes (") are not accepted and invoke an error message.

- **Delete Folder**

12.3.4 Deleting Folders

When **Delete Folder** is clicked, the following window is displayed:

- Click **Delete Documents Only** to delete only the records stored in the folder.
- Click **Delete Folder & Documents** to delete the folder and records stored in the folder.

12.4 Requesting Records

You can request records that have been saved in the E-Shelf in one of three ways:

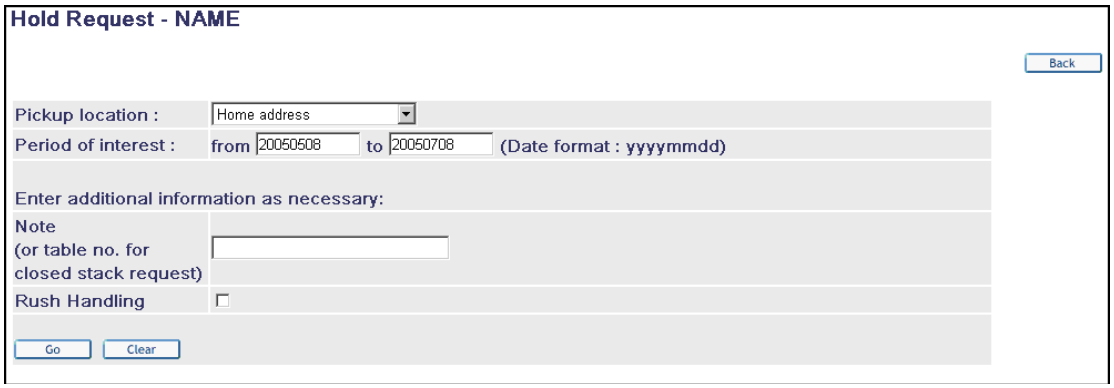
- Regular Requests
- Parallel Requests
- Serial Requests

12.4.1 Regular Requests

You can place regular hold requests on all of the selected records.

Steps

1. Choose records by selecting the check box next to each record in the list, and click **Request**. A form for selecting the requests' pickup location displays:



2. Click **Go**. This creates separate requests for all of the selected records, as described below. Accordingly, if three records have been selected, then three separate hold requests are created, one for each selected record.

The drop-down list of available pickup locations includes all of the pickup locations that are allowed for this patron for all of the selected records. Selecting one of the pickup locations, as well as setting the period of interest, the note and the 'Rush Handling' option, sets these values for all of the requests that are created.

In some cases creating a request on the record may fail. This might happen because one of the selected records may require creating the request from the record's item list. For example, a record may have items that differ from each other and therefore do not belong to the same group of like items. Another possibility is that the patron is not allowed to create a request on any of the record's items, or that the selected pickup location is not allowed for any of the record's items. Therefore, after submitting the form a report such as the following will be displayed with a note containing the reason of its failure:

Ex Libris University – Records which were not requested

No.	Title	Note
1	Genomic Perl	Not all items are like item – Please apply to hold request on a specific item.
2	Monitoring the future	Item or like copy is on shelf. Cannot place hold request.

To set up the Note column in the table, refer to the **Setting Up the Note Column in the Records Which Were Not Requested Table** section of the *Aleph 21 System Librarian's Guide - Web OPAC*.

After all requests have been submitted, the following message is displayed at the top of the E-Shelf page:

All your requests have been successfully processed.

After a hold request is submitted successfully, the relevant record in My e-shelf is marked with a check: ✓.

Any records with a hold request is displayed in My e-shelf marked with the a check ✓. To set up the Submitted a Hold Request column in My e-shelf, refer to the **Setting Up the Submitted a Hold Request Column in My e-Shelf** section of the *Aleph 21 System Librarian's Guide - Web OPAC*.

12.4.2 Parallel Requests

A parallel request instructs the library to supply the patron with any one of the selected records. The workflow for placing such requests is similar to that for placing regular requests, as described in 12.4.1 Regular Requests above. The only difference is that the patron clicks on the Parallel Request link. However, the resulting requests are treated as a single group of hold requests, so that if any one of the requests is filled, all of the group's requests will be considered as filled.

12.4.3 Serial Requests

Serial requests are a group of requests that are required by the patron to be filled in a particular order. The workflow for placing such requests is similar to that for placing regular requests, as described in 12.4.1 Regular Requests above. The only difference is that the patron clicks on the Serial Request link. However, as the order of the

requests is significant, the selected records in the E-Shelf must be arranged in order prior to the request being created. The patron does this by using the arrow buttons that are next to each record in the E-Shelf list. The buttons let the patron move a record up or down in the list, and the order of the selected records in the list sets the order of the serial requests.

The resulting requests are considered as serial requests, so that the system will fill them in the order in which they were created. Only the first request in a group of serial requests will be considered active.

12.5 Selecting\Deselecting All

You can select or deselect all of the E-Shelf records by clicking **Select All** or **Deselect All**.

13 History

The History function lets a library patron view his search queries which he saved on his previous visits to the library. These search queries are saved to a permanent buffer and can be used as "bookmarks" for future use. The queries are saved to History from the Previous Searches window. To activate the History function, the patron clicks **History** from the menu bar. The following screen appears:

	Database	Search Request	Date	No. of Records
☐	USMARC BIB (USM01)	W-subjects= chemistry	04/03/02	13
☐	UNIMARC BIB (UNI01)	W-author= Wittgenstein	04/03/02	1
☐	USMARC Course(USM30)	W-Course Name= philosophy	04/03/02	6
☐	USMARC BIB (USM01)	Words= United States	04/03/02	1203

From the Search Request in History window, the patron can rerun his search queries by clicking **Find**, or delete them from the permanent buffer. Note that the value displayed in the No. of Records column refers to the number of records retrieved at the time that the search query was first run.