

## Aleph Working Group October 10, 2007 10:30 - noon Holy Cross College Library

**Attending:** Phil Andrzejewski, Aaron Bales, Kevin Blowers, Pascal Calarco (recording), Sue Dietl, Tom Hanstra, Mandy Havert, Judy Kendall, Sarah Kolda, Kitty Marschall Mary McKeown?, Tracey Morton, Pam Nicholas, Lisa Stienbarger.

## Agenda:

### 1. AWG Direction from MALC Directors: discussion (30 minutes)

---

E-mail from Jennifer Younger to MALC Directors, Associate Directors, and Pascal Calarco, 10/4/07: Email to MALC directors: I want to confirm what we agreed on as next steps in our Sept. 21 discussion. We had earlier sent four themes to Pascal Calarco, chair, AWG as three primary themes emerging from our summer meeting. Those themes were:

\* shared view of our library resources is desirable, what are the options? \* regarding circulation, would be desirable to get circ info & stats, e.g. circ, patron demographics and checkout, add ILL data to the mix, what are options for ground delivery service (Info Express) to increase MALC circulation – 5 day at min., streamline ILL to circ function among MALC/ direct request

Pascal and AWG responded that "what gets done depends on the goal." They identified three possible goals:

- increase findability
- enhance resource/sharing through increased circulation
- cooperative technical services, e.g., a single authority file

Pascal also indicated that his department is creating a circulation history file for the University Libraries circulation data. The personal identifiers in this file, which contains information including the item title, call number and demographic data on the patrons - student, faculty or other, area of study or department affiliation. If he doesn't hear anything from us, Pascal will set up similar files for SMC, HC and Bethel.

First, in reverse order, we all agreed with setting up circulation history files for all MALC libraries. Also, that each library would want its own report and that we wanted some way to look at them as a whole. We discussed whether the Law Library could export data so that a circulation history file could also be kept for Law. Ed said he would follow up with Joe Thomas and we will also pass this along to Pascal.

- reporting monthly -- with item history reports; roll into web excel-ready reports; this will be something for new Project/Application Developer - what about creating series of pseudo-patrons for each department for all the borrower statuses? (Aaron). - this will make the program more complex (Tom); but it seems like a worthwhile idea to consider (Pascal)

Second, we would like the AWG - in consultation with the Circulation Working Group and Screen Design Committee - to explore the first two goals of 1) increasing findability and 2) enhancing resource/sharing through increased circulation. We would like to see 2 or 3 options of how each goal might be achieved. We would like AWG to explore these options in the context of what is happening in Indiana, including ALI resource-sharing, direct request borrowing options to WorldCat?, and the inevitable transition in five or so years to a new online system.

- we can look at union catalog and "next gen" options as we go and they present themselves - look at statewide

catalog as well; check link from within [WorldCat?](#).org to search; check off of incolsa.net

- need to deduplicate barcodes in order to pursue enhanced resource sharing with Patron Direct Queue (PDQ)
- probably more than 10 years ago, because this was an issue when we were shopping around for Aleph; need assessment on extent of the problem - this would be good to use for a lot of reasons more than just if we want to use Patron Direct Queue - hard to resource this with student hours; it would be better to get personnel through either an on-call service or temp service - another option is to increase traffic through ILL; look at routing tables from all four institutions? - folks don't know if there are campus mail services between ND, HCC, SMC - our role is to identify a couple different options, and present it to them for resourcing - clarify whether Law Library should be included in the findability component of this; are there barcoding duplicates here as well? - with rebarcoding, this is very specific, so we could come back to them and provide specific feedback - benchmarking: how long does it take to rebarcode? Sue will ask Judy; we have not been considering going up into the Tower - Aaron put together a canned search for looking for duplicate barcodes, but this is hard to use are busier service locations like Hesburgh; Engineering is currently doing this at discharge - right now we are prioritizing items that have circulated a certain number of times between Notre Dame and Saint Mary's - about 16k items were changed over the past year, between work, during slow periods - need to scan real-time; start with Bethel, then Holy Cross - Action items: 1) regenerate reports for four institutions 2) benchmark how approximately how long it takes to recode items 3) focus on the fact that this has come from MALC Directors - perhaps start staff working at MALC sites; all four institutions share in cost

We did not set a time line but we will ask AWG to keep us informed either through AWG members or through an email to us. If this looks good, then I will send to Dan Marmion and AWG with copies to all of you so that you can share as you wish in your libraries.

## 2. Aleph 20 enhancements: discussion (30 minutes)

---

The site is password-protected, so I am summarizing here:

**1. OPAC-3: Spell-Check** Problem Statement: The user of an Aleph Catalog should be alerted if they have misspelled a word because misspellings lead to failed searches. Keyword search terms should be spell-checked against the indexes before they are searched.

Concise Description of Functionality Desired: Spell-check of keywords before search performed.

Concise Rationalization of Request: Spell-checking greatly reduces the number of failed searches. Some libraries have added a spell-checking program on top of their OPAC software. This should be provided as basic functionality of the software. It should not be necessary for libraries to program a work-around to provide this important (and increasingly expected) service. Both Ill and [SirsiDynix?](#) HIP OPACs offer a type of spell-checking. -- UC Davis, 8/10/07

**2. CAT/AUT-13: Function Keys** Problem statement: Typical Windows function keys (e.g. Ctrl-C, Ctrl-V) stop working for no apparent reason. Concise Description of Functionality Desired: Make sure function keys work consistently.

Concise Rationalization of Request: When typical function keys do not work staff must use drop downs to do things like copy and paste. This is inefficient.

**3. SYS-7: Real-time Data Interchange** Problem statement: Current batch processing to import/export data between Aleph and other systems means the changes are delayed until overnight or weekly processing can be

done.

Concise Description of Functionality Desired: Real-time data interchange to eliminate services run overnight for Course, Financial, Patron and Customer/User Relationship Management Systems. Examples: Banner, PeopleSoft [?](#), Moodle, Sakai. Include import and export of patron, course, fines and acquisition payment information.

Concise Rationalization of Request: Real-time update would help keep the library's data in synch with campus systems. The result would be better service to patrons and more integration between the library and the campus.

**4. CIR-3: Add Recall as a filter** Concise Description of Functionality Desired: Add recall as a filter for all circulation notices. We'd like to be able to send recall courtesy notices and recall overdue notices with wording specific to the recall situation.

**5. SYS-3: Retrieval of associated system numbers** Problem Statement: If a user has one set of system numbers, but needs an associated set, such as holdings numbers, there is no easy way to get them.

Concise Description of Functionality Desired: Provide an easier way to get a set of associated system numbers from whatever system numbers you have. There are improvements coming for p\_manage\_70, but all possible permutations should be included.

Concise Rationalization of Request: There needs to be an way to get desired associated system numbers, such as a set of holdings numbers from bib numbers, item sequence numbers, or barcodes. We can use ret\_adm\_01 or the multi-step SQL query that Jerry Specht provided. These methods are inefficient when all we want is a set of numbers to correct or look at records.

**6. ACQ/Ser-12: Map material type from order to item** Problem Statement: No matter what order material type is selected, the item record is always created as a "book". This means that the item records for all non-book material types must be edited manually.

Concise Description of Functionality Desired: When an item record is created automatically from the order, the material type should be retained from the order. It should not revert to the material type for book.

Concise Rationalization of Request: Mapping material type is problematic from order to item for formats other than books. The location information is transferred over from the order record, but for some reason the material type is not. One institution was told that the information about format in the item record does not come from the order record, but from an entirely separate file. It would be extremely helpful if the material type and item status could have some connection--in other words, if you change material type to DVD, it would be ideal if the item status would then change to audiovisual, without having to manually change this too.

**7. CIR-5: Ability to select more than one item status, but not all, in a service** Problem Statement: Currently, the Services forms (such as p\_cir\_52) only allow selecting All item statuses, or a single item status. This means libraries have to run the same job multiple times to cover all relevant item statuses.

Concise Description of Functionality Desired: It should be possible to select one or more item statuses without having to select All. Concise Rationalization of Request: Allowing libraries to run the batch jobs once for multiple statuses would be more efficient and reduce the total cost of ownership.

**8. SYS-6: Batch (offline) updating of non-constant data** Problem Statement: Item and order records often need data corrected and the needed correction is not the same for each record.

Concise Description of Functionality Desired: The preference would be that Ex Libris offer this change functionality within the Cataloging module as an offline edit of multiple items--as in: o select multiple items and (as we do for multiple deletes) o lock for offline edit (to ensure that competing edits aren't attempted while offline edit is in process) o edit all as needed o then send to server en masse for replace of all selected/edited items. Another, though distant second, solution would be a way to export the records or required data fields, modify them offline and reload the data. Perhaps, this would be something like p\_manage\_18 for orders and items?

Concise Rationalization of Request: Corrections to item description fields that necessitate item by item work can be excruciating with a long list of items. Staff often spend hours doing this manually. Since this is usually as task that line staff do, it would be preferable to have the solution be one that they can use and not have to ask their systems people to run.

**9. OPAC-5: Make browser navigation work** Problem description: Typical browser navigation should work with the OPAC, especially the back button.

Concise Description of Functionality Desired: Working browser navigation.

Concise Rationalization of Request: It is bad usability to require the use of the Aleph prev and next buttons to navigate among search results.

**10. SYS-1: Comparable data for comparable reports run from services** Problem Description: Comparable data is not available for comparable reports, such as claims. For instance, we can get Ordering Unit for monograph claims (acq\_12) but not serial or standing order claims.

Concise Description of Functionality Desired: It would be really nice if all the information from the order rec, brief bib was available in the XML and users were able to choose what elements or give us the ability to add in elements to the XML.

Concise Rationalization of Request: When certain data elements are missing, the reports become less than useful. We are currently able to delete elements or move them, but not add. Missing elements often mean staff have to take extra steps to add the information before the actual work can be done.

**11. SYS-4: Unable to create multiple holdings records using p\_file\_96** Problem Description: The only way to load records with multiple 049s (for the creation of multiple holdings records is the multiple step process of file\_01, file\_02, manage\_18 and manage\_50.

Concise Functionality Desired: Create a loader that allows the use of multiple 049s to create multiple holdings in a one step process like p\_file\_96.

Concise Rationalization of Request: The match and merge moved into file\_96, for v.19, is great progress toward a one step generic loader but one more step is needed: the ability to create multiple holdings. This request was filed as an SI (8192-43434) from the University of Minnesota. The response was this would be done in v.19, development 19176. There is a v.19 enhancement re: match/merge functionality for p\_file\_96, but not the ability to create multiple holdings and items from multiple 049s. (This problem also exists with the marcive loader)

## Discussion

- CAT/AUTH function keys should be a high priority; this has been with us since 11.4 - OPAC navigation also an important one, but of the two OPAC items, spellcheck higher priority; dictionaries need to include multilingual terms - to what extent can we comment on these for more information? Hopefully the spellcheck -

SYS-1: consistency between retrieval of data points and what one is able to report on; perhaps this does not go far enough; - SYS-3: important for report - medium: 3, 6 (problem with consistency between what we use between material and order types, so this might force the issue; we would have to do a lot of data cleanup for this to be useful) - not important: 8, 11, 4 (we already do this; use conditional statements within forms), 7

- Pascal will enter these votes as below:

Priority:

1. CAT/AUT-13: Function keys 2. OPAC-3: Spell-check 3. SYS-3: Retrieval of associated system numbers 4. SYS-1: Comparable data for comparable reports 5. OPAC-5: Make browser navigation work 6. ACQ/SER-12: Map material type from order to item 7. SYS-4: Create multiple holdings 8. SYS-7: Realtime data interchange 9. SYS-6: Batch updating of non-constant data 10. CIR-5: more than one item status 11. CIR-3: Add recall as a filter

### 3. Other items for discussion (up to 30 minutes; add them below by editing the page)

---

#### 1. How to edit wiki pages; brief demo & Q&A (Pascal)

- we had to skip this, as wireless signal wasn't available in room

#### 2. Join us for lunch at Holy Cross to celebrate Sue Dietl!

- Sarah wasn't able to join us, as she had reference desk duty, so the group decided to go to La Esparanza; we all had a great time sharing lunch and reminiscing with Sue!

-- [PascalCalarco](#) - 09 Oct 2007

This topic: [MalcWiki](#) > [WebHome](#) > [AlephWorkingGroup](#) > [AlephWorkingGroup20071010Minutes](#)

History: r2 - 29 Oct 2007 - 15:50:46 - [PascalCalarco](#)

Copyright © by the contributing authors. All material on this collaboration platform is the property of the contributing authors.

Ideas, requests, problems regarding TWiki? [Send feedback](#)

