



# Staff User's Guide – Staff Privileges

Version 24

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# 1 Staff Privileges

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

## 1.1 Staff Privileges in a Single/Multi-ADM Environment

### Multi-ADM Environment

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

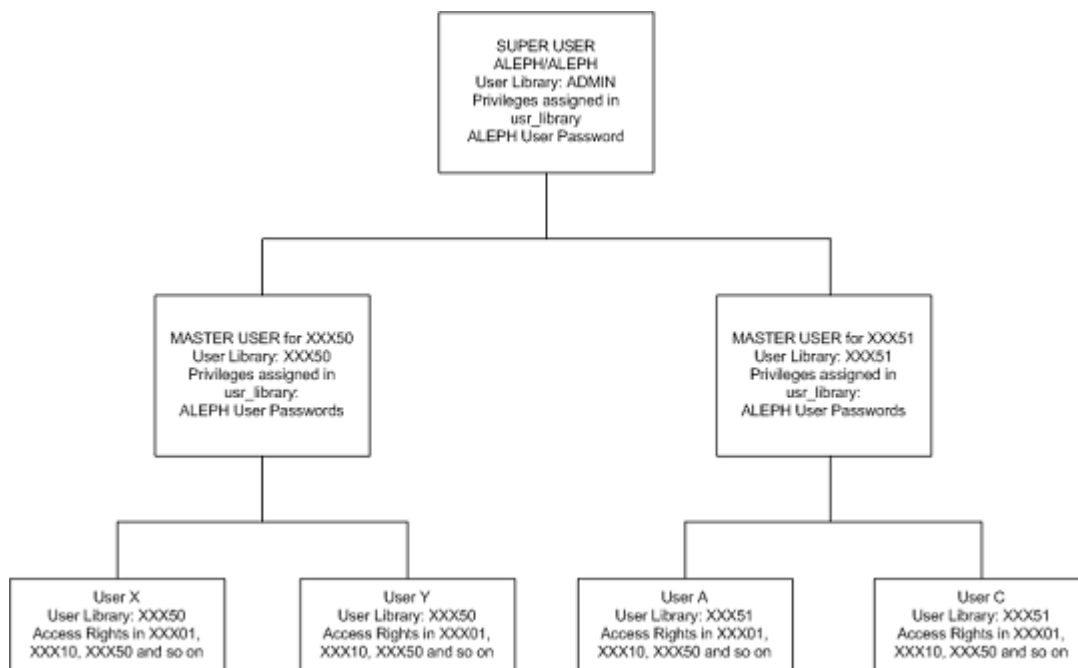
For password control, there is a "super user" who is assigned ADMIN in the User Library field. He can create a user who is authorized to create and/or update passwords and authorizations for a particular ADM library group. This new user must be assigned an ADM library and the privileges that allow him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

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

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

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

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



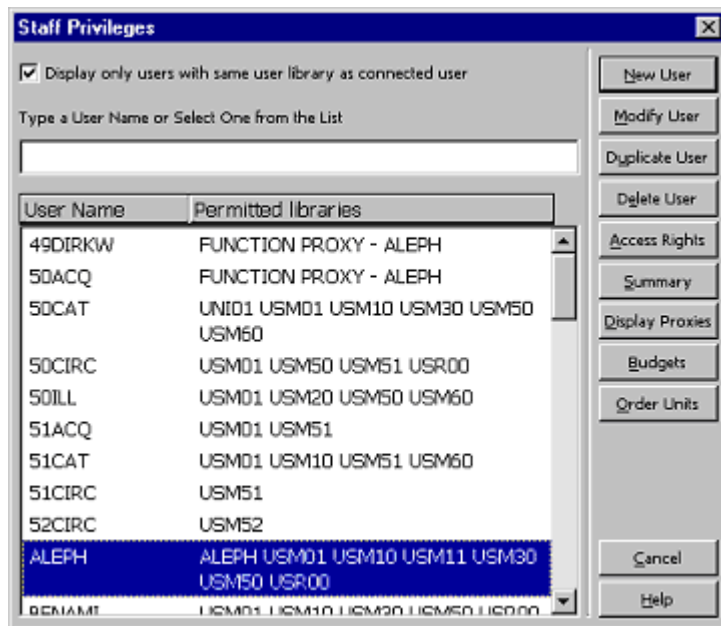
When the Staff Privileges function is opened, the system displays a list of users, username and the libraries for which the user has been assigned authorizations. The list can be set to display all users, or only users that belong to the same ADM group as the logged in user.

### Single-ADM Environment

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

## 1.2 Staff Privileges Window

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



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

#### Note

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

#### New User

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

#### Modify User

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

#### Duplicate User

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

#### Delete User

To delete a user, highlight the user and click **Delete**. Do not delete the ALEPH user unless you have first created another user with the access rights to assign passwords.

The only way to reinstate the ALEPH user is to delete the files that contain user names and passwords (files Z66 and Z67), using UTIL A/17/1. Consult Ex Libris before doing this.

### **Access Rights**

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

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

### **Summary**

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

### **Display Proxies**

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

### **Budgets**

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

### **Sublibraries/Order Units**

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

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

## **1.3 User - Password Information**

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

### User Library

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

### User

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

### Password

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

### Cataloger Level

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

### **Function Proxy**

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

#### **Note**

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

### **Cataloger Proxy**

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

#### **Note**

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

### **Budget Proxy**

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

#### **Note**

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

### **Order Unit/Sublibraries Proxy**

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

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

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

#### **Note**

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

#### **Cat. OWN ID**

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

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

#### **Note**

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

#### **Cat. OWN Permission**

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

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

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

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

#### **Circ. Override Level**

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

#### **ILL Unit**

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

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

**Name**

The name of the staff user.

**Department**

A department that is associated with the staff user.

**Note 1 and Note 2**

A general note that is attached to the staff user.

**Email**

The staff user's e-mail address.

**Address**

The staff user's address.

**Telephone**

The staff user's telephone number.

**Expiry Date**

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

**Last Alert Date**

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

**Blocked**

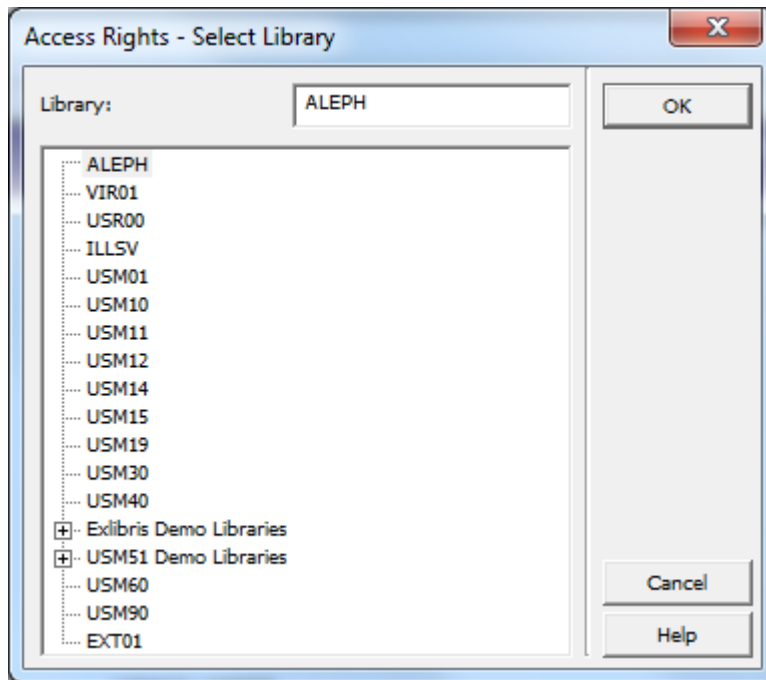
Whether or not the staff user is blocked from accessing the system.

**Block Reason**

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

## 1.4 User's Access Rights

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



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

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

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

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

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

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

#### **Global Library without Sublibraries**

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

### **Global Library with Sublibraries**

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

### **Individual Sublibrary**

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

### **Sublibrary Sensitivity**

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

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

#### **Note:**

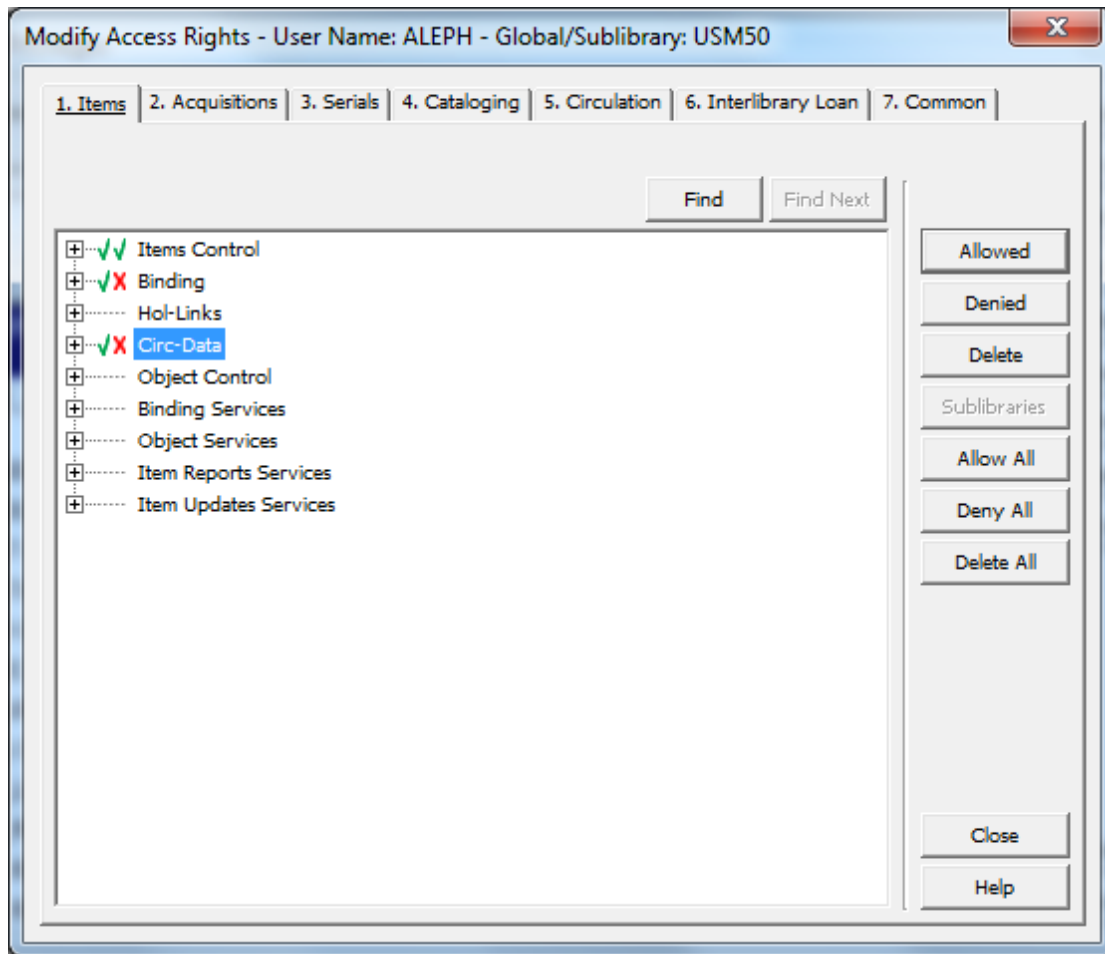
The **Sublibrary** button is accessible only if the highlighted permission is sublibrary sensitive.

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

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

#### **1.4.1 Modify User's Access Rights**

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



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

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

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

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

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

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

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

The following buttons may be used:

**Allowed**

Allow the selected group or action.

**Denied**

Deny the selected group or action.

**Delete**

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

**Sublibraries**

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

**Allow All**

Allow all of the actions in the selected module.

**Deny All**

Deny all of the actions in the selected module.

**Delete All**

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

**Note**

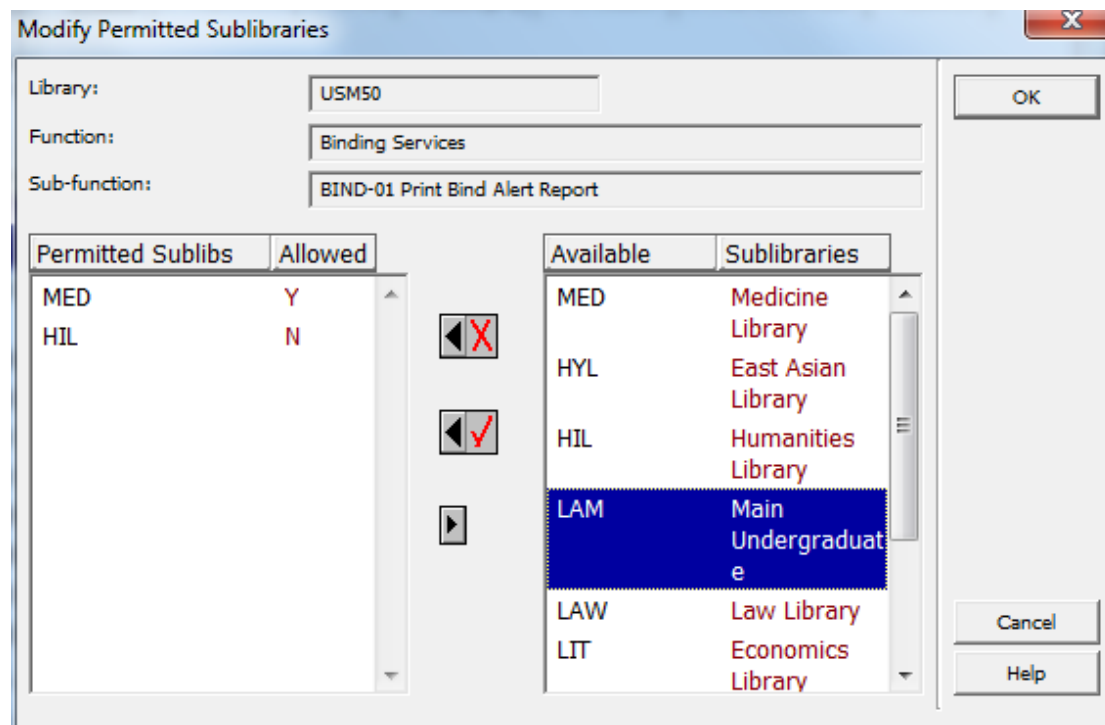
User Passwords and User Profiles are not included in the **Common** tab's **All Functions** action. In other words, **All Functions** refers to every function EXCEPT User Passwords and User Profiles. If you want to give a user access rights to User Passwords or User Profiles, you have to choose these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

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

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

## 1.4.2 Modify Permitted Sublibraries

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



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

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

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

### Note

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

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

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

sublibraries.

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

To highlight more than one sublibrary, hold down the Ctrl key while clicking the desired sublibraries. To highlight an entire range of sublibraries, click the first sublibrary in the range, then, while holding down the Shift key, click the last sublibrary in the range.

### Note

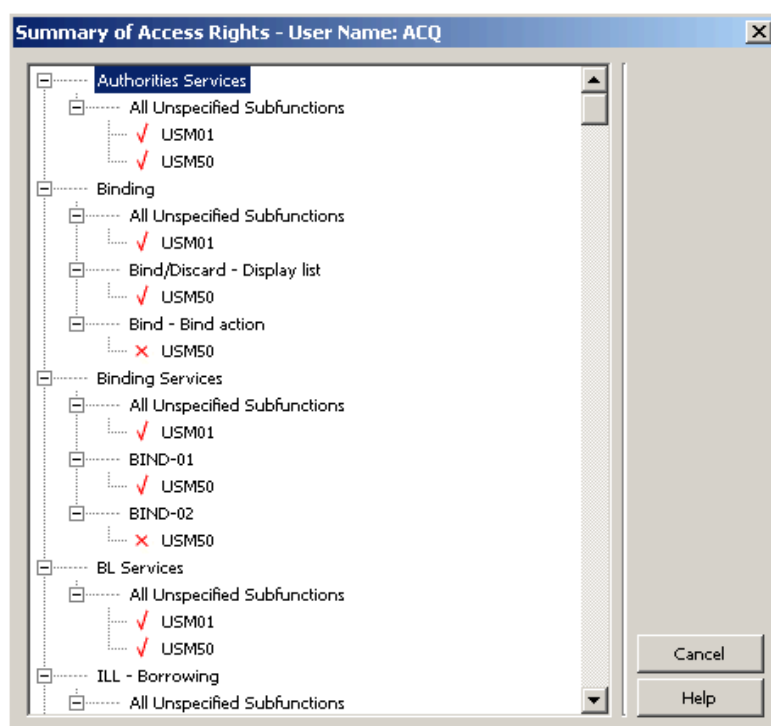
In ALEPH, the loan and return of items from a specific sublibrary is not controlled via the staff user names and passwords but rather via the IP identification of the PC.

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

## 1.5 Summary of Access Rights

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

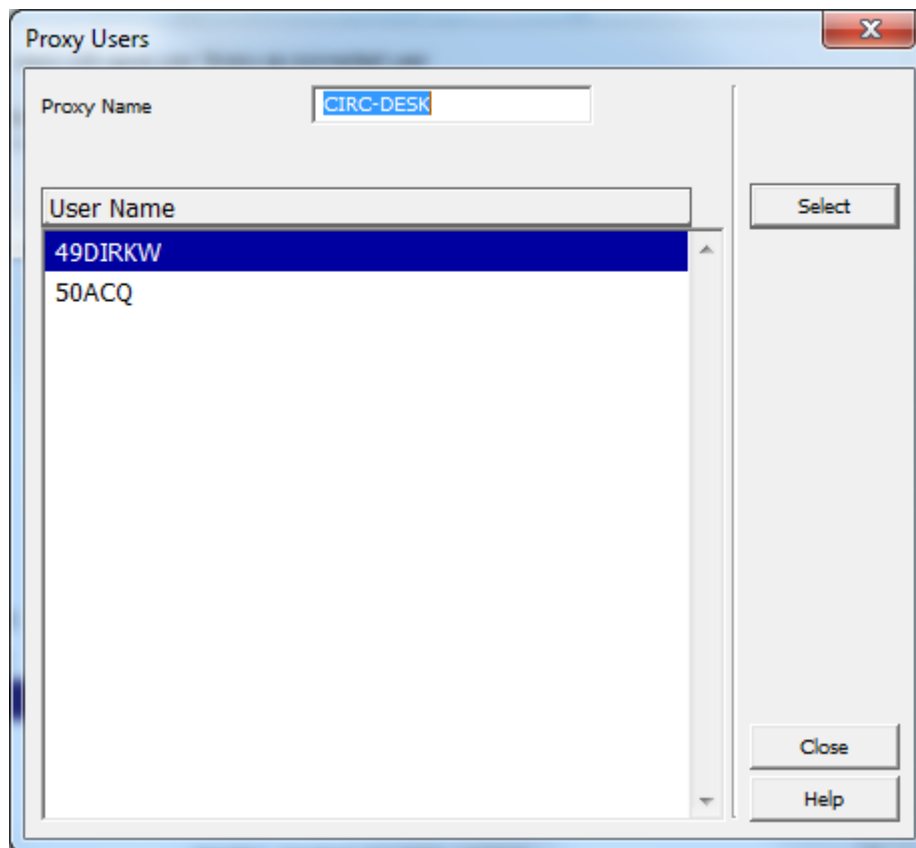
To change the access rights, return to the Staff Privileges window (by clicking **Close**) and then click **Access Rights**.



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

## Viewing Proxy Users

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

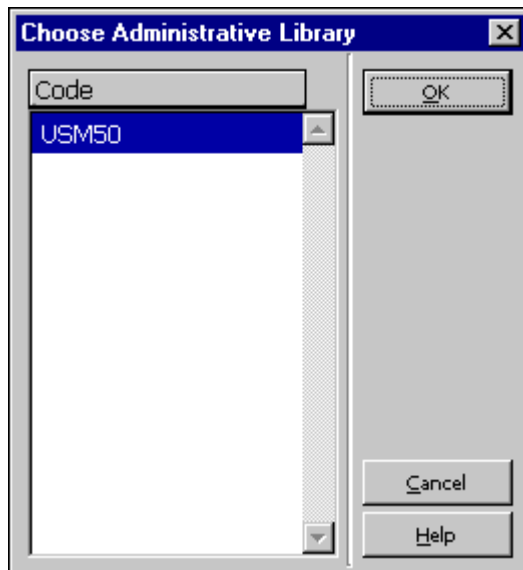


The Proxy Users list window enables you to view the complete list of proxy users assigned to a specific user.

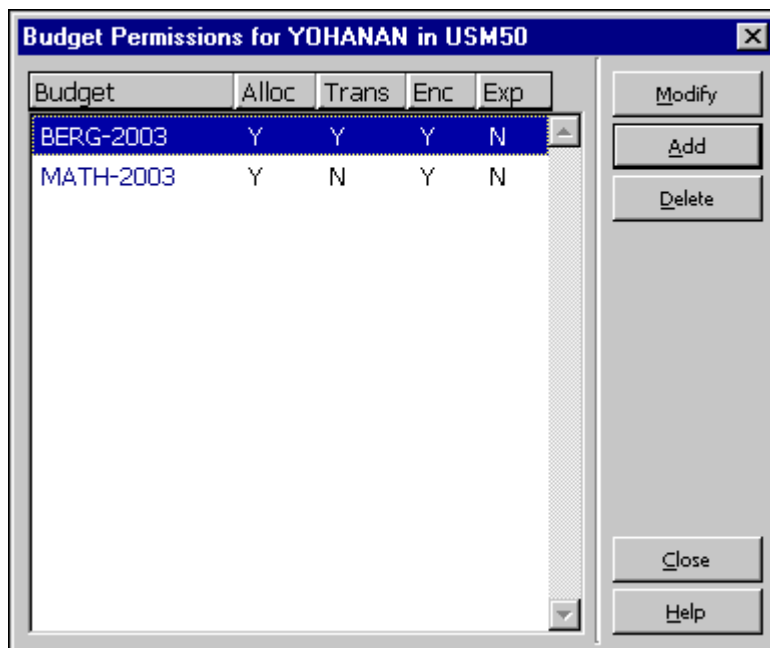
To switch to one of the users displayed in the list, highlight the user and click **Select**.

## 1.6 User's Budget Permissions

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



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



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

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

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

### Note

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

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

### Modify

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

### Add

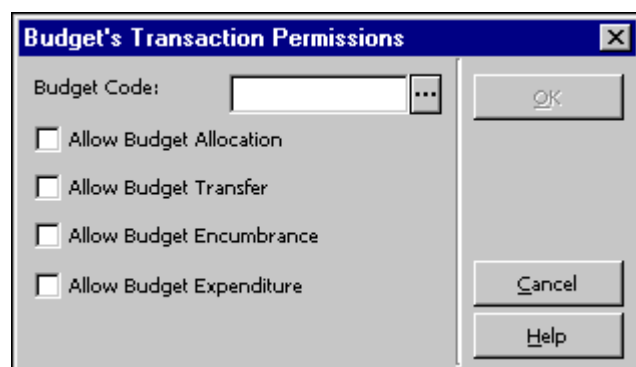
To add a new budget permission, click **Add**. The Budget's Transaction Permissions window will be opened for you to add the new budget permission.

### Delete

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

## 1.6.1 Budget's Transaction Permissions

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



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

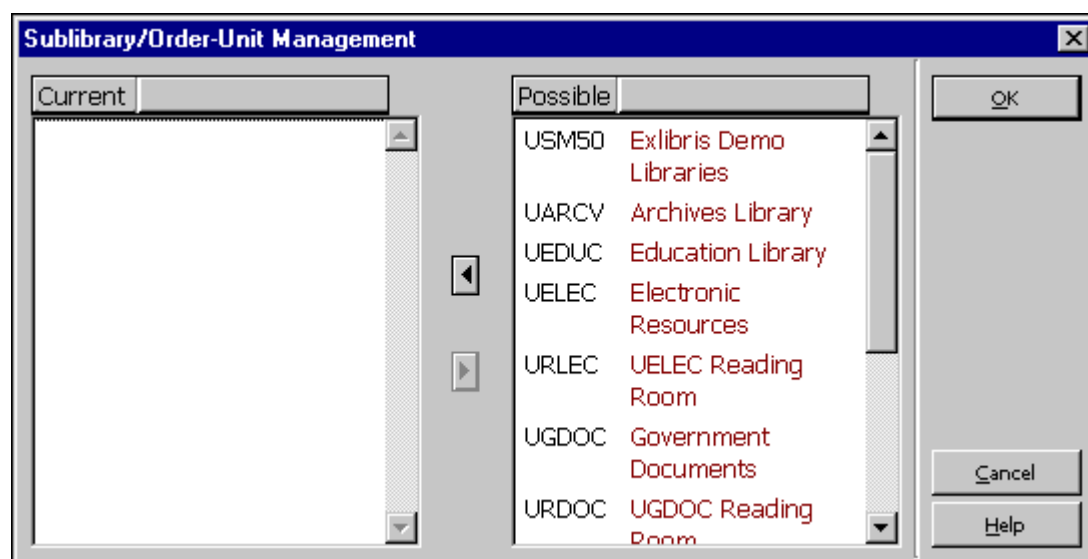
After typing or selecting the budget code, check the relevant budget transaction permission/s for the user:

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

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

## 1.7 Sublibraries / Order units

When you click Order Units or Sublibraries in the Staff Privileges window, the Sublibrary / Order Units management screen will be displayed (note that if you are working in a multi-ADM library environment you will need to select an ADM library first). The list can contain sublibraries or order units, depending on whether your Acquisitions system is set to work with sublibraries or with order units.



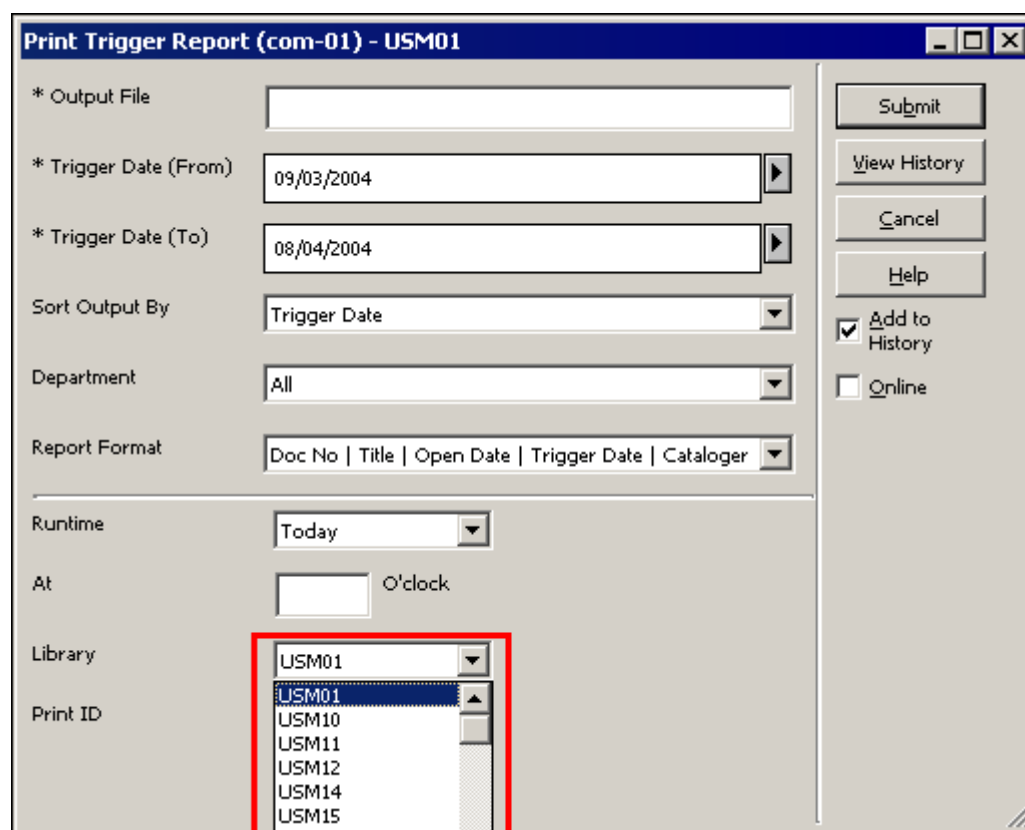
The user is allowed to be active in Acquisitions only in the selected sublibraries/order units. You must select the allowed sublibraries/order units, otherwise the user will not be permitted acquisitions activity in any sublibrary/order unit. The system first checks whether the user has permission for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

To assign a sublibrary/order unit to a user, go to the right-hand list, highlight the desired sublibrary/order unit, and click the left arrow. The sublibrary/order unit will move to the left-hand list. To highlight more than one sublibrary/order unit at a time, hold down the Ctrl key while clicking each desired sublibrary/order unit. To highlight

a continuous range of sublibraries/order units, highlight the first sublibrary/order unit in the range, then hold down the Shift key and highlight the last sublibrary/order unit in the range. To remove a sublibrary/order unit from a user, go to the left-hand list, select the unwanted sublibrary/order unit, then click the right arrow. The sublibrary/order unit will move to the right-hand list.

## 1.8 Display of Libraries in ALEPH Services

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



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

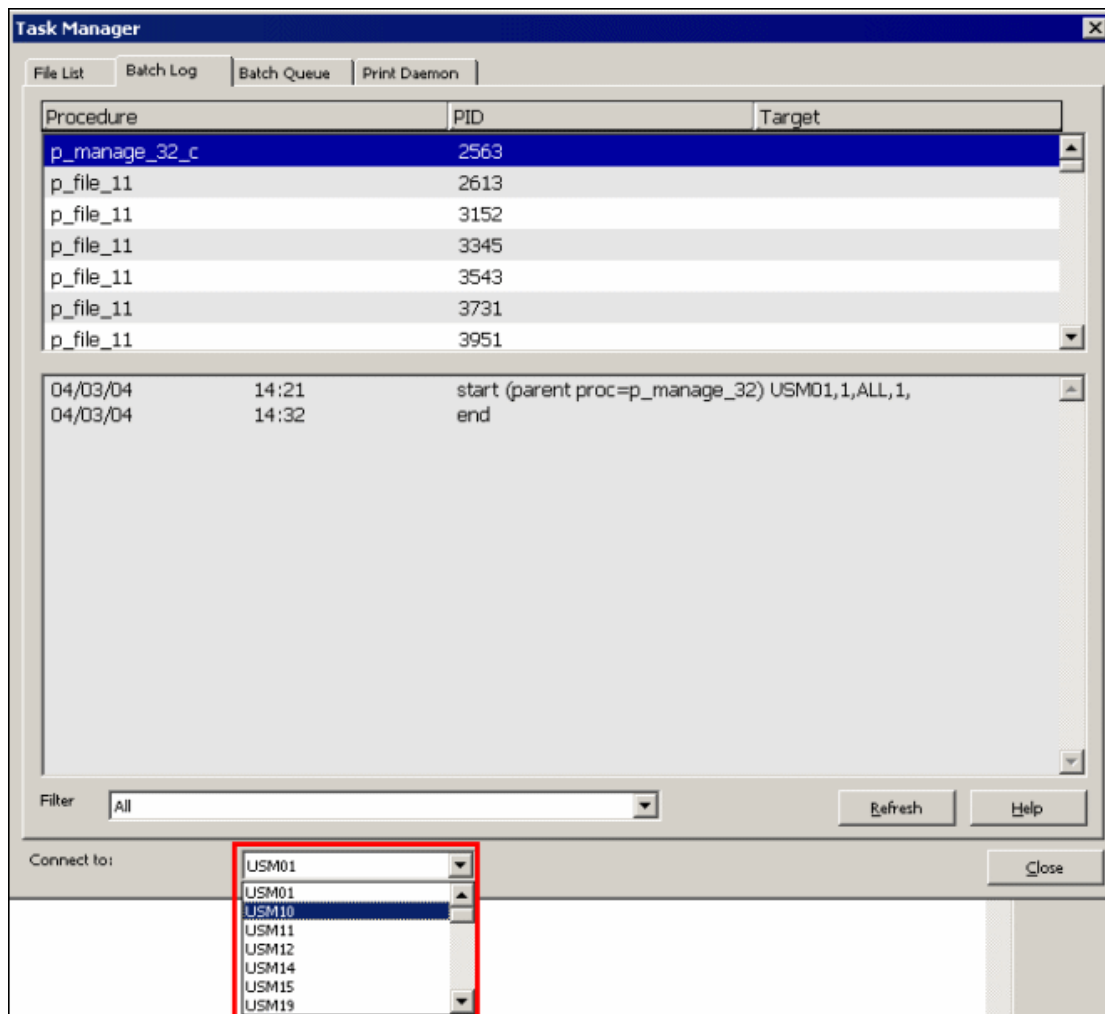
```
PAS USM50 USM01 USM10 USM11 USM12 USM14 USM15 USM19
```

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

## 1.9 Display of Libraries in the Task Manager Window

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

appropriate library from the drop-down list:



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

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

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

## 2 ALEPH User Privileges

Below is a list of the ALEPH user privileges.

### 2.1 Items

#### 2.1.1 Items Control

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

#### 2.1.2 Binding

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

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

### 2.1.3 Hol-Links

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

### 2.1.4 Circ-Data

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

### 2.1.5 Object Control

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

### 2.1.6 Binding Services

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

### 2.1.7 Object Services

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

### 2.1.8 Item Reports Services

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

### 2.1.9 Item Updates Services

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

## 2.2 Acquisitions Module

### 2.2.1 Order-index

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

### 2.2.2 Ordering

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

### 2.2.3 Order-Claim

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

### 2.2.4 Material-Arrival

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

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

## 2.2.5 Invoicing

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

## 2.2.6 Vendor Maintenance

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

## 2.2.7 Budget Maintenance

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

## 2.2.8 Currency Utilities

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

## 2.2.9 Info Services

| Service Name | Service Description |
|--------------|---------------------|
| acq-03       | Print records       |

## 2.2.10 Maintenance Services

| Service Name | Service Description |
|--------------|---------------------|
| acq-04       | Rebuild order index |

### 2.2.11 Budget Services

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

### 2.2.12 Vendor Services

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

### 2.2.13 Claim Services

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

### 2.2.14 Currency Services

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

### 2.2.15 Invoicing Services

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

### 2.2.16 Ordering Services

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

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

### **2.2.17 EDI Services**

| <b>Service Name</b> | <b>Service Description</b>    |
|---------------------|-------------------------------|
| edi-09              | Process EDI Incoming Messages |
| edi-10              | Load EDI Incoming Messages    |
| edi-11              | Send Outgoing EDI messages    |

## 2.3 Serials

### 2.3.1 Issue

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

### 2.3.2 Pattern

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

### 2.3.3 Schedule

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

### 2.3.4 Subscription

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

### 2.3.5 Claim

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

### 2.3.6 Serial-Hol

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

### 2.3.7 Routing

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

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

### 2.3.8 Serials Statistics Services

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

### 2.3.9 Routing Services

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

### 2.3.10 Pattern Services

| Service Name | Service Description   |
|--------------|-----------------------|
| serial-12    | Check Serial patterns |

### 2.3.11 Subscription Services

| Service Name | Service Description  |
|--------------|----------------------|
| serial-13    | Open Expected Issues |

### 2.3.12 Claim Services

| Service Name | Service Description |
|--------------|---------------------|
| serial-44    | Print claim letters |

### 2.3.13 Management Serials Services

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

## 2.4 Cataloging Module

### 2.4.1 Cataloging Record

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

### 2.4.2 Catalog Management

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

### 2.4.3 Catalog Overview Tree

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

### 2.4.4 Catalog Headings

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

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

## 2.4.5 Authorities Services

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

## 2.4.6 Loading Services

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

## 2.4.7 Indexing Services

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

## 2.4.8 Record Services

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

## 2.4.9 BL Services

| Service Name | Service Description   |
|--------------|-----------------------|
| manage-45    | Load PALAS Shelfmarks |

## 2.4.10 Union Catalog Services

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

## 2.4.11 Publishing Services

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

## 2.5 Circulation Module

### 2.5.1 Patrons, Global

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

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

### 2.5.2 Patron Profiles

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

### 2.5.3 Patrons – Cash

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

### 2.5.4 Patron Circulation Info

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

### 2.5.5 Circulation Desk

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

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

## 2.5.6 Loan Management

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

## 2.5.7 Circulation Requests

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

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

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

## 2.5.8 Items Management

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

## 2.5.9 Circulation Management

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

## 2.5.10 Course Reading

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

## 2.5.11 Cash Services

| Service Name | Service Description |
|--------------|---------------------|
| cash-02      | Cash report         |

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

### 2.5.12 Circulation Desk Services

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

### 2.5.13 Management Circ Services

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

### 2.5.14 Items Management Services

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

### 2.5.15 Patron Services

| <b>Service Name</b> | <b>Service Description</b> |
|---------------------|----------------------------|
| cir-05              | Print patron list          |
| cir-23              | Delete patron records      |

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

### 2.5.16 Requests Services

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

### 2.5.17 Circ Statistics Services

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

### 2.5.18 Course Reading Services

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

## 2.6 ILL Module

### 2.6.1 ILL – Borrowing

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

### 2.6.2 ILL – Lending

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

### 2.6.3 ILL – Management

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

### 2.6.4 Borrowing Services

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

### 2.6.5 Lending Services

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

### 2.6.6 Management ILL Services

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

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

## 2.7 Common Functions

### 2.7.1 Overview Tree

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

### 2.7.2 Record Triggers

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

### 2.7.3 Task Manager

All Task Manager views

### 2.7.4 Configuration Manager

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

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

### **2.7.5 Staff Privileges (Passwords)**

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

### **2.7.6 Z39.50 users**

Z39.50 search users – Update via Z39.50

### **2.7.7 SIP2**

SIP2 login

### **2.7.8 XSL Generator**

Update XSL print template on server

### **2.7.9 Union Catalog Management**

Access Union Catalog Management Interface

### **2.7.10 Utilities Interface**

Access Utilities Interface

### **2.7.11 Services Interface**

Services Menu Interface

### **2.7.12 Reports Services**

| <b>Service Name</b> | <b>Service Description</b> |
|---------------------|----------------------------|
| com-01              | Print trigger report       |
| manage-70           | Record Keys Conversion     |
| sys-90              | Batch jobs summary report  |

### 2.7.13 DB Services

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

### 2.7.14 ADM Indexing Services

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

### 2.7.15 Printing Services

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

### 2.7.16 Search Services

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

### 2.7.17 SDI Services

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

| Service Name | Service Description |
|--------------|---------------------|
| sdi-04       | SDI User Broadcast  |

### 2.7.18 Server Jobs Services

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

### 2.7.19 Staff Services

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

### 2.7.20 X-SERVER Interface

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

## 3 Staff Services

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

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