



USER DOCUMENTATION (ALEPHINO 4.0)

## **Sub-library system**

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# 1 Concept

In Alephino a sub-library system means that all data from the individual sub-libraries may be used collectively and will be maintained in a central database that may be accessed by all associated libraries.

In contrast to an Alephino "multipool" system where you also work in one installation but with separate databases, the "splitting" of data in a sub-library system applies e.g. to patron data or acquisition data. The databases of the individual libraries thus are similar which need not be the case with a multipool system. An Alephino sub-library system e.g. could be used at a technical college which is spread over various locations but whose sub-library system holdings are similar and partly identical.

The cataloging in a sub-library system takes place cooperatively in terms of entering the bibliographic data and the authority data (subject headings, authors, corporate bodies etc.). The local = sub-library relevant data is the item records whose sub-library affiliation may be distinguished by assigning a code (max. 5 digits) in the field "Sub-library".

The sub-library system functionalities run through all modules. E.g. in the Items module the copies are assigned to a specific sub-library, in Circulation the patrons get permissions for different sub-libraries, in the Acquisitions module, orders are created by sub-library, and in the WWW-OPAC and in the Search module the copies are displayed separately for each sub-library.

The permissions of an Alephino user in regard of the individual sub-libraries are controlled via the user administration in the "Setup Services" section of the Web Service Module. Depending on the login at the Alephino Windows client the Alephino user gets connected to his home library.

Ill.: View of a title in the WWW-OPAC with copies in different sub-libraries

## Full view of title

<b>Record 1 of 3</b>	<a href="#">◀ Previous Record</a>	<a href="#">Next Record ▶</a>
<b>Main Title</b>	<a href="#">Title with items in different sublibraries</a>	
<b>Imprint</b>	Hamburg Ex Libris 2006	
<b>No. items</b>	3	
<b>Items Central library</b>	1 : A-95	
<b>Items Sub-library 1</b>	1 : B-95	
<b>Items Sub-library 2</b>	1 : C-95	
	<a href="#">◀ Previous Record</a>	<a href="#">Next Record ▶</a>

## 2 Setup

To work sub-library sensitive in Alephino, the system must be setup as follows:

### 2.1 Activate sub-library mode and define standard sub-library

This is done in the file `..\etc\alephino.cfg` in the section (Sublibs):

```
..
(Sublibs)
SublibMode = Y          << activate with Y
Default = SL1          << define standard sub-library
..
```

The standard sub-library is used e.g. when an Alephino user has not been assigned a home library.

### 2.2 Change internal definitions

- Activate new link for external use in `..\etc\marclink.ext`

```
(titlink)
...
LINK=LDN,DEFIN=11:1,DIRECT=B
LINK=HOL,DEFIN=14:1,DIRECT=B
*LINK=MEX,DEFIN=20:1,DIRECT=B    <<
LINK=MEX,DEFIN=20:2,DIRECT=B    <<
LINK=THS,DEFIN=16
...
```

### 2.3 Setup sub-libraries

First, the sub-libraries must be setup. This is done in the menu "Setup Services" under "Edit tables" - "Sub-libraries".

#### General adjustments

Server shutdown

System configuration

#### Sub-libraries

Library address

There, the following input mask opens:

## Edit table of sub-libraries

short name	naming (english)	naming (german)	
SL1	Sublibrary 1	Zweigstelle 1	X
SL2	Sublibrary 2	Zweigstelle 2	X
ZB	Central library	Zentralbibliothek	X
<input type="button" value="reset"/>	<input type="button" value="set"/>		

## 2.4 Alephino user

Afterwards, each member of the library staff must be assigned a standard sub-library. In addition, you may define if the assigned permissions of the user for modules and functions apply to all sub-libraries and not only to the standard sub-library.

### User Maintenance

Name  Group  Administrator

#### Permissions

Database  assigned to sublibrary  Permissions to all sublibraries

For basic information on how to setup users please read the help of the function.

## 2.5 Circulation parameters

To define circulation parameters sub-library sensitive, first select the desired sub-library. This is done in the menu "Setup Services" under "Maintenance" - "Select sub-library".

### Maintenance

Select database

#### Select sub-library

Show log

Show protocol

There, the following menu opens:

## Select a sub-library ...

Your current sub-library:

If you now e.g. define borrower-related permissions, it happens for the selected sub-library:

## Setup circulation permissions - sub-library: SL1

### Borrower-related permissions

Borrower status	Loan	Hold request	Multiple hold request	Renew	Ignore late return	Ignore circulation lockings	Recall	Hold request to available items	Renew while claimed	Search profiles	Self loan/self return Web-OPAC	Maximum age for borrower status
<input type="text" value="1."/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>	<input type="text" value=""/>
<input type="text" value="any"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> / <input type="checkbox"/>	<input type="text" value=""/>

For basic information on how to setup the circulation parameters please read chapter 6 from the document Alephino\_Setup\_eng.doc.

## 2.6 Display holdings in Web OPAC and Search module

In order to display the holdings grouped by sub-library, the file `..\etc\marclist.ext` must be edited as follows:

```
..
*****
*
* Bibliography
*****
*
..
*
*
(titl6)
TAG=000.999,LINK=20:1,FORM=mexl3
TAG=000.1,LINK=20:1,FORM=mexl3,LOG=X
*
*
..
```

change to

```
*
(titl6)
TAG=000.999, LINK=20:2, SUBLIB='SL1', FORM=mexl3s11
TAG=000.999, LINK=20:2, SUBLIB='SL2', FORM=mexl3s12
etc.
*
```

and

```
..
*
(mexl3)
TAG=100.999$a
TAG=000, TEXT='#035#035', LOG=U
TAG=107.999$a
*
..
*
(mexl3x)
TAG=100.999$a
TAG=107.999$a, LOG=X
*..
```

change to

```
..
*
(mexl3)
TAG=100$a, DELIM=' ; '
TAG=000, TEXT=SKIP
TAG=107$a, DELIM=' ; '
*
..
*
(mexl3x)
TAG=100$a
TAG=107$a, LOG=X
*
..
```

In addition, the following sections must be added:

```
*
(mexl3s11)
TAG=000, TEXT=' (SL1) ',
TAG=100$a, LOG=U, DELIM=' '
TAG=000, TEXT=SKIP, LOG=U
(mexl3s12)
TAG=000, TEXT=' (SL2) ',
TAG=100$a, LOG=U, DELIM=' '
TAG=000, TEXT=SKIP, LOG=U
etc.
*
```

Furthermore, in the file `..\etc\marcform.ext` the following lines must be added:

```

..
(titfull)
..
TAG=BIB$L,NAME=011LINKU,LINK=1,INFO='LKR_LINK',SUB=subUPL
*TAG=RECLIST,NAME=011LINKD,LINK=1,INFO='LKR_LINK',SUB=subDWL
TAG=000,NAME=011LINKD,LINK=1,INFO='LST_LINK,BDE'
TAG=RECLIST,NAME=011LOC,LINK=14:1,FORM=852
TAG=000,NAME=011ITM,LINK=20:1,INFO='GLOBAL_ITEM'
TAG=000,NAME='Items Sub-library 1',
  LINK=20:2,SUBLIB='SL1',INFO='SUB_LIB_ITEM',FORM=subs11
TAG=000,NAME='Items Sub-library 2',
  LINK=20:2,SUBLIB='SL2',INFO='SUB_LIB_ITEM',FORM=subs12
etc.
..
(titwww)
..
TAG=BIB$L,NAME=011LINKU,LINK=1,INFO='LKR_LINK',SUB=subUPL
*TAG=RECLIST,NAME=011LINKD,LINK=1,INFO='LKR_LINK',SUB=subDWL
TAG=000,NAME=011LINKD,LINK=1,INFO='LST_LINK,BDE'
TAG=RECLIST,NAME=011LOC,LINK=14:1,FORM=852
*TAG=000,NAME=011ITM,LINK=20:1,INFO='GLOBAL_ITEM'
TAG=000,NAME='Items Sub-library 1',
  LINK=20:2,SUBLIB='SL1',INFO='SUB_LIB_ITEM',FORM=subs11
TAG=000,NAME='Items Sub-library 2',
  LINK=20:2,SUBLIB='SL2',INFO='SUB_LIB_ITEM',FORM=subs12
etc.
..
(subs11)
TAG=COUNT,LINK=20:2,SUBLIB='SL1'
TAG=000,TEXT=' : ',LOG=U
TAG=000.999,LINK=20:2,SUBLIB='SL1',FORM=mex13
(subs12)
TAG=COUNT,LINK=20:2,SUBLIB='SL2'
TAG=000,TEXT=' : ',LOG=U
TAG=000.999,LINK=20:2,SUBLIB='SL2',FORM=mex13
etc.
..

```

**Please note that entries which are longer than one line must be inserted in the next line with 2 blanks so that the system knows that this line is not a new entry but still part of the entry inb the previous line.**

### 3 Application

In principle, working with a sub-library system is no different from working with a system that has only one central library. Still, in some points there are differences which are listed below.

#### 3.1 Borrower- and item maintenance

In a sub-library system the borrower permissions are assigned per sub-library:

Subl.	Status	Description	Privileges	Valid to	Last activity
SL1	01	employee	Loan=N Renewal=N Hold request=N Multi hold request=N Self loan=N Self return=N Ignore=N No overdue notice=N User profile=N Requesting available item=N	00/00/0000	
SL2	01	employee	Loan=Y Renewal=Y Hold request=Y Multi hold request=N Self loan=Y Self return=Y Ignore=N No overdue notice=Y User profile=N Requesting available item=N	00/00/0000	06/15/2006
ZB					

In case the sub-library system is set-up afterwards and e.g. there is now -in addition to the standard sub-library ZB- another sub-library SL1, all borrowers that already exist in the the circulation module must get privileges for the new sub-library. If you are logged in as user with sub-library SL1 (see section 2.4) and in the Circulation module retrieve a borrower who so far had only privileges for the sub-library ZB, the system automatically creates an empty privileges record for the sub-library SL1. Highlight it and assign the desired privileges. If the privileges for the sub-library SL1 are identical those of sub-library ZB, you can simply copy the privileges records of sub-library ZB of all existing borrowers for the sub-library SL1. For this, please proceed as follows:

#### 1. Web Services / Interfaces / Export data:

- Fill in fields

File: User permissions

Data format: Alephino

Export file: e.g. ..\temp\user\_permissions.txt

all other fields need not to be filled

--> then click start

#### 2. Modify export file (e.g. with WordPad)

Replace sub-library ZB by SL1.

```
201 01
202 20070614
204 Y
205 Y
206 Y
207 Y
208 Y
209 Y
210 Y
211 Y
212 20060615
213 N
214 Y
218 10.00
219 N
BOR L000000001a0917
SUB ZB <<
```

3. Save database (with release backup!), so that - in case something goes wrong - the state from before the import can be loaded.

4. Web Services / Interfaces / Import data:

- Fill in fields

File: User permissions

Data format: Alephino

Import file: e.g. ..\temp\user\_permissions.txt

Mode: Load without checks

Response to doublets: Record in doublet file

Response to errors: Record in error file

all other fields need not to be filled

--> then click start

Now, all borrowers have the same privileges for the sub-library SL1 as for ZB.

In addition, each borrower is assigned to a home library in the global user information:

1. Global Patron Details		2. Global Blocks and Notes	
Open Date:	<input type="text" value="00-00-00"/>	Update Date:	<input type="text" value="00-00-00"/>
Patron ID:	<input type="text" value="000000000003"/>	Pincode:	<input type="text" value="****"/>
Barcode:	<input type="text" value="56789"/>	Registration Number:	<input type="text"/>
Name:	<input type="text" value="Tester, Holly"/>		
Title:	<input type="text"/>	Date of Birth:	<input type="text" value="03/31/1975"/>
Home Library:	<input type="text" value="SL1"/>	Language:	<input type="text" value="ENG"/>

As this field was not mandatory, it will probably be empty in most cases. To assign a selected standard library in all borrower records, please proceed as follows:

1. Create e.g. in directory *etc* a file e.g. *home\_lib.txt* with the following content:

```
// SCRIPT FOR ASSIGNING A HOME LIBRARY "ZB" IN BORROWER RECORDS

proc HOME

// BORROWERS

    :SUB = "ZB"

end proc
```

2. Save database (with Release Backup!), so that -in case something goes wrong- the status from before the script can be reconstructed.
3. Web Service Modul / Administration / Modify Data:

- Fill in fields

Master file: Users

Script file: e.g. *../etc/home\_lib.txt*

Script: HOME

--> then click start

Now, all borrowers ZB as home library.

Also items are assigned to a specific sub-library:

1. Item Display		2. General Information (1)		3. General Information (2)		4. Serial Information		5. Serial Levels		6. HOL Links		
Barcode:	<input type="text" value="45758"/>	Item Status:	<input type="text" value="00"/>									<input type="button" value="Update"/>
Sublibrary:	<input type="text" value="SL1"/>	Item Process Status:	<input type="text"/>									<input type="button" value="Save Defaults"/>
Collection:	<input type="text" value="00001"/>	Enum. Level.1 (A)(Vol.):	<input type="text"/>									<input type="button" value="Refresh"/>
Copy Number:	<input type="text" value="00000"/>	Enum. Level.2 (B):	<input type="text"/>									<input type="button" value="Cancel"/>
Material Type:	<input type="text"/>											
Hol. Link:	<input type="text" value="0"/>											
Call No. Type/Call No.:	<input type="text"/>	<input type="text" value="B-95"/>										
2nd Call No. Type/Call No.:	<input type="text"/>	<input type="text"/>										
Description:	<input type="text"/>											

### 3.2 Orders and subscriptions

Orders in the Acquisitions module and subscriptions in the Serials module, too, are sub-library sensitive:

1. Order Display		2. General		3. Vendor		4. Quantity and Price	
Order Number:	<input type="text" value="2006/1"/>	Order Status:	<input type="text" value="RSW"/>				
Additional Order No. 1:	<input type="text"/>	Additional Order No. 2:	<input type="text"/>				
Order ISBN/ISSN:	<input type="text"/>	Order Group:	<input type="text"/>				
Open Date:	<input type="text" value="15-06-06"/>	Status Date:	<input type="text" value="15-06-06"/>				
Order Date:	<input type="text" value="00-00-00"/>						
Material Type:	<input type="text" value="MO"/>						
Sublibrary:	<input type="text" value="SL1"/>						
Acquisition Method:	<input type="text" value="P"/>						
Initiator ID:	<input type="text"/>						
Initiator Name:	<input type="text"/>						
Action:	<input type="text" value="None"/>	Approver ID:	<input type="text"/>				
Library Note:	<input type="text"/>						

1. Info. List	2. Subscription Info. (1)	3. Subscription Info. (2)	4. HOL Links
Sublibrary:	SL1		
From Date:	01/01/2005		
To Date:	12/31/2099		
Item Status:	05		
Collection:	00001		
Call Number Type:			
Call Number:			
2nd Call Number Type:			
2nd Call Number:			
Vendor Code:	BLACKWELL		
Order No.:			
Vendor Order No.:			
Delivery Type:	A	Hol. Link:	0

### 3.3 Hold request process

When requesting an item the following must be considered:

- in the Circulation module

The hold request must always be placed on items of the borrower's home library. This happens via the item filter in the hold request form. The item filter takes over defaults from the selected item, therefore it is recommended to mark resp. select an item of the desired sub-library when creating a hold request.

- via menu Requests / Create hold request

**Create Hold Request - 45758 - 000000000003/Tester, Holly**

1. Request Information      2. Item Filter Information

Only Selected Item      Copy: 0     

Sublibrary: SL2      Year:     

Item Status: 00      Volume:     

Item Process Status:      Part:     

Collection:      Issue Number:     

- via item list, button "Hold request"

**Create Hold Request**

Patron ID / Name: 000000000003      Tester, Holly     

Author of Part:

Title of Part:

Pages to Copy:

Note 1:

Note 2:

From Date: 06/15/2006      To Date: 06/15/2007

Recall Type:

Priority:

Rush Handling

Item Matching Filter

Only Selected Item      Copy: 0

Sublibrary: SL2      Year:     

Item Status: 00      Volume:     

Item Process Status:      Part:     

Collection:      Issue Number:     

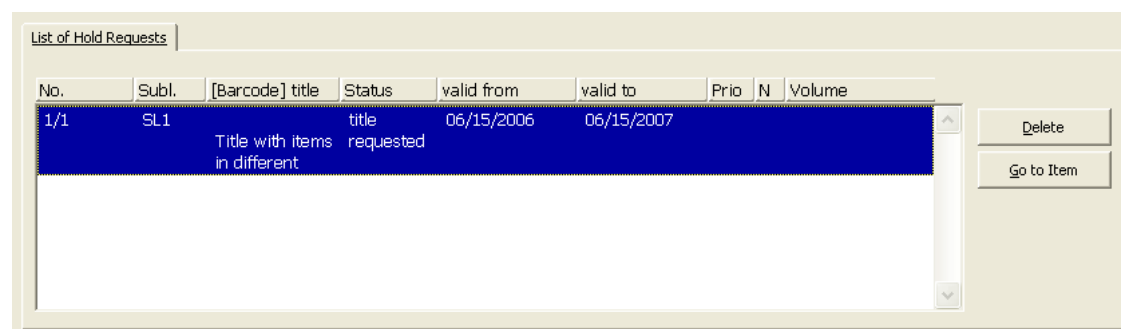
    

- in the Web OPAC

A hold request placed via the Web OPAC is usually\* a title hold request which refers to all items. When a hold request is placed, all items of the title are checked by the system whether they are requestable or not. If there is no requestable item or e.g. there is an available item a corresponding message is displayed and the hold request is not created. If Alephino is setup as sub-library system, the check for requestability is only performed on items of the borrower's home library. Requestable items of other sub-libraries are not considered.

\* (unless parameter ExactRequest in *../etc/alipac.cfg* was set to Y, then all requests are Item requests and refer to the selected item only)

The sub-library in the hold request record is always the home library of the borrower:



No.	Subl.	[Barcode] title	Status	valid from	valid to	Prio	N	Volume
1/1	SL1	Title with items requested in different	title requested	06/15/2006	06/15/2007			

If now an item is returned, the system checks whether there is a hold request for the title, i.e. for any item of the title. In a sub-library system, only hold requests of the own sub-library (i.e. hold request records whose sub-library matches with the sub-library of the logged-in Alephino user) are checked. If such a hold request is found, the system then checks whether there are available items in the own sub-library which can be provided.