



Associazione Italiana Utenti ExLibris

<http://www.itale.it>

IV Workshop ITALE

Verona 10-11 aprile 2008



**Integrated Aleph: open issues
and perspectives**

***ALEPH500 verso l'integrazione:
problemi aperti e prospettive
future***

9.30-13.00

Agenda

- *ITALE: a profile of the Association*
- *ILL SBN and integrated ILL in ALEPH500*
- *Aleph500 and CIA System*
- *Open Issues in ALEPH500 (vs 16 and 18)*





ITALE: a profile of the Association

Our mission

- **Sharing information.** To offer the user community a forum for sharing information
- **Coordination.** To coordinate initiatives and activities in the field of library and information services and technology
- **Common strategies.** to define common strategies for the development of innovative library services
- **IT applications.** To promote, distribute and implement new IT applications among its members
- **Standards.** To share common standards for the development of library systems
- **Cooperation.** To cooperate to National and International research projects
- **Developments.** To coordinate all Members' requests for the development of Ex-libris products, interacting with the local distributors and the IGeLU



ITALE: a profile of the Association

A brief history... 19 years long

1989

First Aleph installation in Italy (Scuola Normale Superiore, Pisa)

1993

ITALE beginnings: a small group of Italian Aleph Users starts his activities

1999

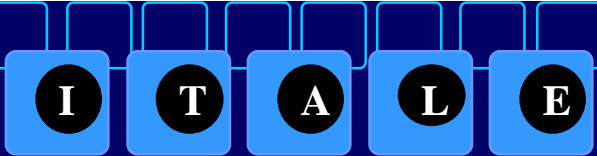
The Italian Association of ALEPH Users (ITALE) was officially established

2007

ITALE enlarge its mission, opening to members using any Ex Libris products

2008

40 institutions are members of ITALE



ITALE: a profile of the Association

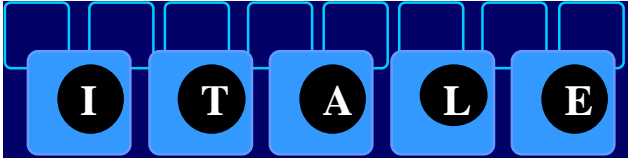
MEMBERS:

- **BERGAMO** Università degli studi di Bergamo
- **BOLZANO** Comune di Bolzano
- **BOLZANO** Biblioteca Provinciale di Bolzano
- **CAMERINO** Università degli studi di Camerino
- **CASSINO** Università degli studi di Cassino
- **COSENZA** Università degli studi della Calabria
- **FIRENZE** Accademia della Crusca
- **FIRENZE** Associazione IRIS
- **FIRENZE** Fondazione Ezio Franceschini
- **FIRENZE** Università degli studi di Firenze
- **GENOVA** Università degli studi di Genova
- **GENOVA** Sistema Bibliotecario Urbano
- **MESSINA** Università degli studi di Messina
- **MILANO** Università degli studi Milano Bicocca
- **MILANO** Università IULM
- **NAPOLI** Stazione Zoologica Anton Dohrn
- **NAPOLI** Università degli studi Parthenope
- **NAPOLI** Università degli studi di Napoli Federico II
- **PADOVA** Università degli studi di Padova
- **PALERMO** Università degli studi di Palermo
- **PAVIA** Istituto di Matematica Applicata e Tecnologie Informatiche - CNR
- **PERUGIA** Università degli studi di Perugia
- **PISA** Scuola Normale Superiore di Pisa
- **PISA** Università degli studi di Pisa
- **POTENZA** Università degli studi della Basilicata
- **ROMA** Agenzia Spaziale Italiana
- **ROMA** Banca d'Italia
- **ROMA** Università degli studi di Roma Tor Vergata
- **ROMA** Università degli studi di Roma Tre
- **ROMA** ENEA
- **ROMA** Camera dei Deputati
- **ROMA** Senato della Repubblica
- **SALERNO** Università degli studi di Salerno
- **SASSARI** Università degli studi di Sassari
- **SIENA** Università degli studi di Siena
- **TORINO** Politecnico di Torino
- **TRIESTE** ITCP
- **UDINE** Università degli studi di Udine
- **VARESE** Università degli studi dell'Insubria
- **VERONA** Università degli studi di Verona

**40 installations
more than 500
Libraries**

Universities
Library Consortia
Public Libraries
Research Centers





ITALE: a profile of the Association

OUR PATRIMONY

Special funds

- Archival materials (3 institutions)
- Collections of letters (4 institutions)
- Music funds (5 institutions)
- Audio-visual medias (14 institutions)
- Photographic funds (4 institutions)

Authority files

Started up in 25 institutions

Electronic resources

- 25 institutions manage local electronic resources
- 18 institutions manage remote electronic resources



ITALE: a profile of the Association

Source of data: survey 2004

OUR DATA

7.538.000 bibliographic records

(monographs, serials, special funds, electronic resources, archival materials)

8.093.000 volumes (physical units)

According to the annual increasing index of our members, in 2007:

11.823.000 bibliographic records

12.316.000 volumes (physical units)

Our patrimony and our data are accessible for downloading through Z39.50.

On ITALE web site is published and frequently updated a database containing the archive of Z39.50 servers parameters.

The access is already provided by **20** of our members.



ITALE: a profile of the Association

Committee 2007-8

ORGANIZATION

CHAIR

Alessandra Bezzi (University of Insubria-Varese) alessandra.bezzi@unisubria.it

STEERING COMMITTEE

(four members and a chairperson) elected by ITALE's members

Liliana Bernardis (University of Udine) liliana.bernardis@amm.uniud.it

Fiorella Liotto (Stazione Zoologica Anton Dohrn-Napoli) fliotto@szn.it

Ennio Ferrante (University of Bergamo) ennio.ferrante@unibg.it

Antonella Trombone (University of Basilicata-Potenza) antonella.trombone@unibas.it

FUNDS

Annual members fee

WORKING GROUPS

Product Working Groups and Special Interest Working Groups



ITALE: an Association profile

DOCUMENTATION

All Information, technical documentation and the ITALE Newsletter are freely available on the ITALE web site (www.itale.it). An area with projects and activities of the Association is restricted to ITALE members. The official language is Italian, but all the documentation for international events is produced in English

INFORMATION

ITALE manages three mailing lists, restricted to:

- Italian Ex-Libris users (**IT-ELUG**)
- Members of ITALE Association (**ITALE**)
- System and Library Managers, Members of ITALE (**ITALE-SYS**)

MEETINGS AND TECHNICAL SEMINARS

- Annually we had two plenary ITALE meetings. Several technical seminar on specific issues have been done since 1996

9.30-13.00

Agenda

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- **ILL SBN and integrated ILL in ALEPH500**
- *Aleph500 and CIA System*
- *Open Issues in ALEPH500 (vs 16 and 18)*

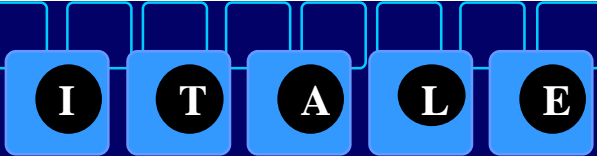


Agenda

- Relations between ITALE and ICCU (the institution that manages the Italian National Bibliographic System)
- Italian institutions tests about integrated ILL
- ITALE - ICCU meeting (April 3th, 2008)
- Future perspectives

Relations with ICCU

- The ITALE – ICCU meeting (Rome, September 18th 2007)
- ITALE attendance at the Meeting on Interlibrary Loan (Rome, December 12th 2007)
- The following agreements



ILL SBN and integrated ILL in ALEPH500: perspectives of integration

Tests about integrated ILL

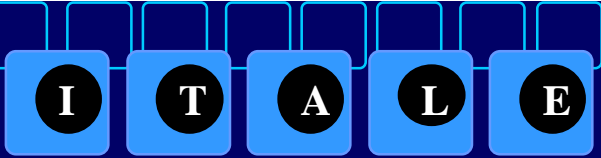
- **ILL and DD services in the Italian ALEPH libraries**

A survey among the ALEPH libraries I carried out last November (in preparation for the Rome Seminar) gave these results

(<http://www.opinionpower.com/results.cgi?id=415051365>):

- ✓ 79% of libraries use ILL and DD services
- ✓ Only 25% of libraries use ILL GUI of ALEPH500
- ✓ No library used the WEB ILL
- ✓ At the moment no library is working with integrated ILL
- ✓ For ILL and DD services, libraries use often (74%) other tools as NILDE and ESSPER for DD, local tools for ILL
- ✓ 3 ALEPH library already subscribed to ILL SBN (Padua, Perugia and Bergamo)

- **The testing of the University of Bergamo and the University of Udine**



ILL SBN and integrated ILL in ALEPH500: perspectives of integration

ITALE – ICCU meeting (Rome, April 3rd 2008)

Goal

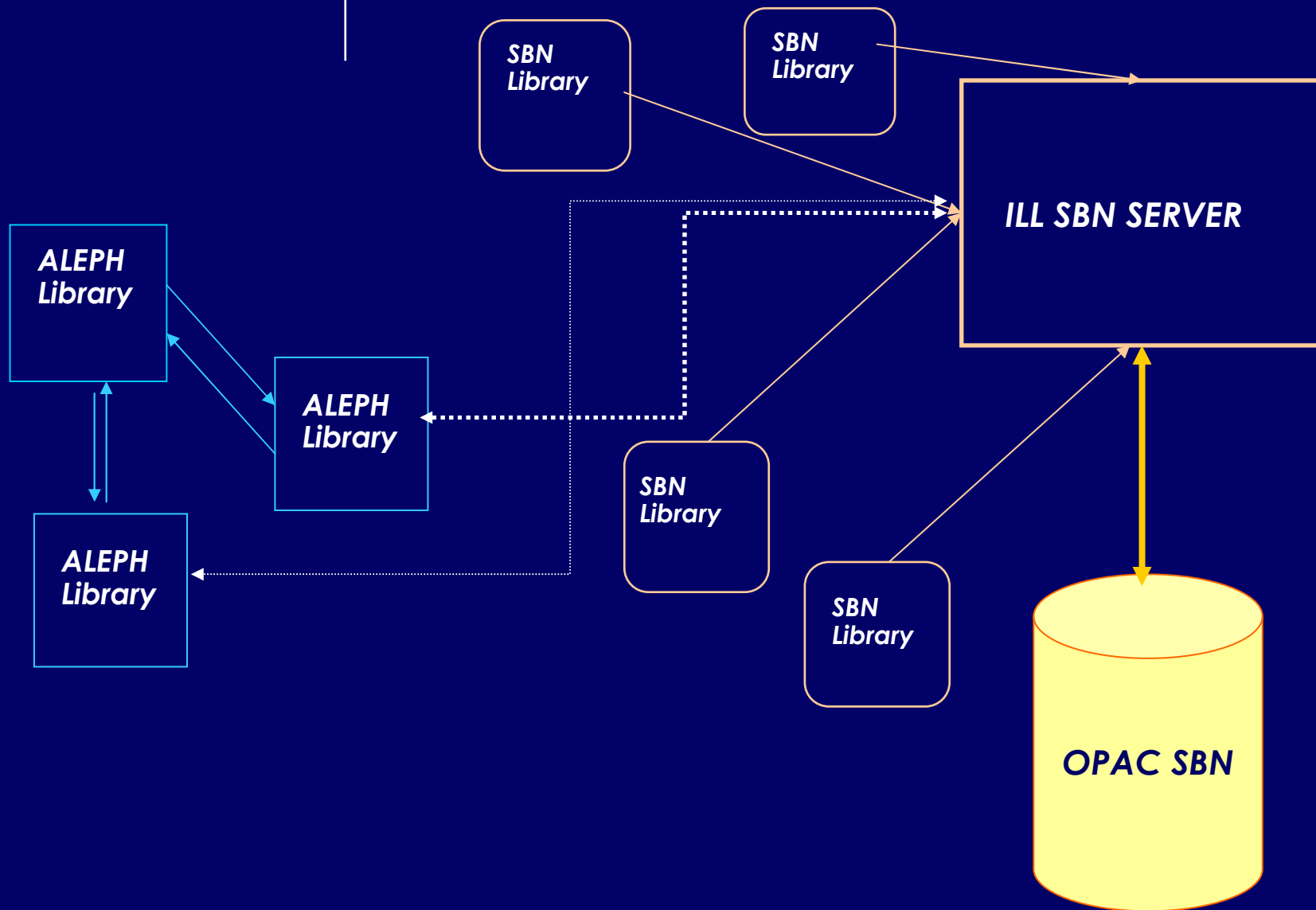
Cooperating to the growth of a national ILL network through the integration of ILL SBN and ALEPH integrated ILL

ITALE requests

- Locating SBN bibliographic records from an ALEPH client
- Sending borrowing requests to ILL SBN through ISO ILL protocol (ISO ILL is implemented both in ALEPH system and in ILL SBN)
- Allowing ILL SBN to locate bibliographic records in the ALEPH catalogues through ISO ILL protocol in order to enter the devoted messages

I T A L E

ILL SBN and integrated ILL in ALEPH500: perspectives of integration



ICCU terms

- Registration of ALEPH libraries to ILL SBN network through the subscription of the Agreement for Interlibrary Loan in ILL SBN (this is a formal aspect; in fact the ALEPH libraries will use the integrated ILL for the ILL and DD services)
- Mutual commitments and mutual services between ALEPH and SBN libraries
- Each subscribing library has to publish a form containing the offered services and their terms (costs, timing, etc.)

The meeting results

- Identification of the developments to integrate the two systems (the developments will be fulfilled by ICCU)
- Creation of a gateway to translate in xml language the APDU ILL (in both ways)
- Filtering by the ILL SBN server of the lending requests and their direction to ALEPH or SBN libraries
- Development of the Item search functionality by the SBN Index

Short term perspectives

- In 20-30 days ICCU will formally reply if the institution takes charge of this project
- In case of a positive reply Atlantis will send to ICCU the technical specifications about the ISO ILL implementation in ALEPH500
- Then a technical table will be organised on timing, resources, number of institutions for the tests, etc.

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Thanks!



*IV Workshop ITALE
Verona 10-11 aprile 2008*

Liliana Bernardis
Università degli studi di Udine
10 aprile 2008

9.30-13.00

Agenda

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Agenda

- What happened before: preliminary discussions
...
- Settlement of a workflow
- The state of the art: technically and politically
- Aleph and U-GOV

Preliminary discussions...

- An interface concerning both the Acquisitions module and the Item module
- Two possibilities: a direct interaction (a single suppliers registry for on-line queries) or an indirect one (data transfer from CIA to Aleph)
- The first theory: starting from the "order proposals"

Settlement of a workflow

- The next possibility: to maintain the management of orders within Aleph, till the invoice arrival
- Then Aleph sends to CIA the “invoice lines” loaded, and CIA manages the patrimonial phase (inventory)
- CIA keeps the suppliers register and the loading takes place in batch modality

Workflow (1)

1) Suppliers: CIA —> ALEPH

- Every night the new or modified suppliers are poured into Aleph
- The CIA supplier code becomes the only ID and it is put in Aleph Z70-ADDITIONAL-VENDOR-CODE
- The first pouring match happens on the basis of VAT number (Z70-NOTE or Z70-CONTAC-4?)

Workflow (2)

2) Invoices: **ALEPH** —> **CIA**

- In CIA the promise to expend is made handly
- At the arrival of the goods and of the invoice, the librarian inserts the invoice data in Aleph ("order lines")
- Then the item line is linked to the same invoice line ("invoice key" field)
- The data are sent to CIA

Workflow (3)

3) Inventory: **CIA** —> **ALEPH**

- CIA creates the pre-invoice and sends an inventory number to Aleph with only one item ID for every invoice line
- The accounting department prints the inventory register at the end of the year

Workflow (4): goods received as gift

- As gifts haven't any accounting relevance for CIA, it isn't possible to move them as a pre-invoice (in "accounting")
- A possibility: to load them in CIA using lists pull out of Aleph
- In Aleph the item lines do not contain information about the way of acquisition (G-GIFT is a datum of the order): to extract them it has to be created a new field (Z30-ITEM-STATISTIC?)
- It won't be more necessary to fill in the order

The state of the art (1): technically...

- Cineca proposes the nightly pouring of all the CIA registry, not succeeding in finding the new/modified records
- This could mean not desired heaviness in Aleph
- To go over difficulties, the University of Padua is helping CINECA in realizing the developments required

The state of the art (2): politically...

- February '08: Florence officially retires from the cartel
- Padua wants to continue the analysis in order to preserve the work done and also expecting a long time for the implementation of U-GOV
- 8 ITALE Universities using CIA have declared their interest in the project

Why we believe in this project...

- To avoid the duplication of administrative job
- Every system has to do what was created for
- To optimize workflows both for librarians and for administrative office

Aleph and U-GOV

- There will be soon a meeting among all the ones involved in order to start the analysis for the integration between Aleph and U-GOV
- Beforehand, the 2 Universities (Florence and Padua) will start analyzing workflows
- U-GOV and Aleph will dialogue through XML, then there will be probably a stronger interaction (also involving orders and budget?)

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Thanks!



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**Marina Corbolante
10 aprile 2008**

9.30-13.00

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Institutions and ALEPH500

- **Number of Institutions : 48**
- **Number of v.18 installations : 18**
- **Number of institutions in production with version 18 : 12**

At 15.03.2008

List of the institutions running v. 18

- **Comune di Bolzano - Biblioteca Civica e Museo**
- **ICTP – International Centre for Theoretical Physics**
- **Politecnico di Torino**
- **Scuola Normale Superiore di Pisa**
- **Stazione Zoologica Anton Dohrn**
- **Università degli studi di Camerino**
- **Università degli studi di Udine**
- **Università degli studi di Verona**
- **Università degli studi dell'Insubria**
- **Università degli studi di Milano Bicocca**
- **Università degli studi di Padova**
- **Università degli studi di Siena**

CATALOGUING (1/3)

- Aleph should completely support UNIMARC.
- With the next release of the 3^o edition of Unimarc/Bibliographic and the 3^o edition of Unimarc Authority it should be appropriate that any changes in Aleph would be implemented through SP in order to have the alignment of the UNIXX.

I**T****A****L****E**

Open Issues in ALEPH500 (vs 16 and 18)

CATALOGUING (2/3)

- The procedures available in any version for MARC21 should be available also for any version for UNIMARC without need of waiting for any following version.

CATALOGUING (3/3)

- `Fix_doc_uni_100_advanced` :
- It took long time to have a right compiling of position 9-12 and 13-16 based on the value in position 8.
- Up to now the problem related to the documents which have detailed date of publication is still open.

ITEMS

- In order to make the GUI more user-friendly the implementation of a new icon enabling the catalogued record to be pushed from cataloguing editor to item would be really appreciated. This would replace the current access provided by Record Manager function.
- We are asking also for implementation of Unimarc Holding standard.

SERIALS (1/4)

- In previous version (v.14) only NEXT issue was generated and it was the only to be displayed as "waited".
- In version 16 and in version 18, all issues for a publication pattern are opened with the same process status (NA).

SERIALS (2/4)

- As ALL issues are generated and have the same process status there are three choices:
 - 1) display of ALL waited issues, but we claim that it is extremely heavy to see all the issues in a publication pattern, especially for serials with high frequency;
 - 2) not display ANY waited issues at all.
 - 3) any editing for changing process status of next issue must be done manually

SERIALS (3/4)

- In version 14, when checking in last issue for a cycle, next cycle's issues were automatically opened by the system.
- In version 16 and version 18 this is not possible.

Even if with the procedure serial-13 all expected issues are opened, the automatic opening of the next cycle's issues by the system is considered more convenient.

SERIALS (4/4)

- In version 11, it was possible to leave blank the "Volume field" in Publication Schedule.
- In version 14, 16 and 18 this is not possible anymore, since a caret sign ^ must be entered. The problem is that this sign is displayed and printed.

CIRCULATION

- We lost the chance to assign rules of loan according to the process status, when those status are defined in table as loanable.

In version 14.1 and version 16.02

- From the list of loans it was possible to recall a loaned item.

In version 18.01

- From the list of loans the function Recall just disappeared.

OPAC

- In version 14.1 when performing a browse search, it was possible to select a heading which had "n" records related and it was possible to save those records in list of sets.
- In version 16.02 and version 18.01 from the browsing list, if more than 5000 records are linked to the heading, the system saves in the list of sets just up to 4997 records.
- This limit does not allow to use this function regularly and can invalidate the search.

SDI

- The SDI function is connected to the item and it has been for sure an improvement, but linking it only to the item (when the item is without process status), it is not possible to notify bibliographic records which don't have item information, such as record of remote electronic resources and pieces analytics.

ILL to ILL2

- The migration kit from ILL module to ILL2 has the following problems:
 - Borrowing requests:**
 - Requests with the status NEW and without any administrative records (as they are NEW) don't migrate;
 - Lending requests:**
 - Lending requests don't migrate in a proper way: the migration kit does not understand to which internal unit (sublibrary) has to assign the request.

Printouts

- Services producing letters (such as cir-51) produce as many files as many letters, so in case of editing, the changes must be done many times. In previous version, services produced only one file (which included several letters) which was very easy to change.
- If XSL creator is used to modify the labels, a table is needed in order to be able to translate captions into the appropriate language. The table `XSL_creator` contains only one line. It should include the list of tags in English to give us the possibility to insert the proper translation for each line.

Password

- Generally speaking the password management both in version 16.02 and 18.01 is more complex, let's say muddled and it is heavier than in version 14.1.
- Talking about the Budget management, in version 14.1 a specific password could work on many budgets and, for instance, could make transactions on them.
- In version 16 and version 18, the system librarian must be in charge of the setting up of pws for the management of budgets every times a librarian has to work on a new budget.
- In this way the administration staff is not independent.

Z313 Inventory number management improvements

These are some improvements that Italian customers ask in order to conform the Z313 inventory number management as required by the Italian law.

Fields to add to Z313 table:

- Invoice date (Z77-I-DATE)
- Material type (book, issue, etc.) (Z30-MATERIAL)
- OPAC note (Z30-NOTE-OPAC)
- Inventory date (Z30-INVENTORY-NUMBER-DATE)

Z313 Inventory number management improvements

End of year inventory number management

- The inventory management is yearly based. At the beginning of the new year the contents of the inventory "register" up to that moment become not changeable. This means that the used Z313 records must be flagged as "locked". We suggest adding a specific flag to Z313 records that will be set by a batch procedure run yearly from library manager.

Z313 Inventory number management improvements

End of year inventory number management

- In these records the only fields that should be “always” updatable are:

Z313-WITHDRAWAL-NOTE and
Z313-WITHDRAWAL-DATE

- As the item could be lost or destroyed after the end of the year, these two fields will be updatable only if the value inserted in the “Internal note” field is not RECOVER (this word has a special meaning for Z313 inventory number management).
- This means that the used inventory after the execution of the yearly batch procedure must not be reusable.

Open Issues and perspectives

Z313 Inventory number management improvements

- Change the Z30-PRICE and Z313-PRICE data type from alphanumeric ("picture X") to numeric ("picture 9"); this because the price is a fundamental field for inventory reports and the presence of alphabetical characters creates some problems in the total amount of books value calculation.

Z313 Inventory number management improvements

- Creation of an on-line interface to create and update the inventory series. Now the new inventory numbers are created using an external program (filling the Z313-USED, Z313-SUB-LIBRARY, Z313-SERIES and Z313-INVENTORY-NUMBER) and are uploaded using p_file_04.

Z313 Inventory number management improvements

- In addition, the z313 management should be aware of the binding function. In ver.18 the z313 table needs to be modified when the z30 records are bound in a new single record with the inventory number of the first issue.

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*Thank for your kind
attention!*



*IV Workshop ITALE
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Emanuela PISANU – Marta PUTTI
Università degli studi di Siena

10 aprile 2008

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13.00-14.00

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