AFO 651 – Server parameters

651.1 Introduction

This AFO contains several sets of parameters related to various aspects of the system. The vary in content and applicability. Some are not necessary for the daily running of the system, others are.

651.2 Z39.50

Z39.50 is a standard for search and retrieval of many types of information such as text, images and multimedia between distributed database system over a heterogeneous network. The protocol achieved general acceptance within the world of distributed information access due to the recent developments in the world of data communication and the Internet.

Each database residing on information servers can have unique characteristics. For example, databases may differ in the way they store data and in the access points available for searching. The records in each of the databases may also have different structures and consist of different data elements. The objective of Z39.50 is to support computer-to-computer communication in standard and mutually understandable terms and support the transfer of data between the systems independently of the structure, content, or format of the data in a particular system. However, in individual implementations, servers may be limited to specific formats of data that can be exported and the access points that are supported for searching.

Through this menu you can set the Z39.50 parameters for Vubis Smart.

Note

You can only implement Z39.50 together with Infor. In this section only parameters the library can change are discussed. Any parameters **not** covered in this section may **not** be changed by the library.

After choosing this option a submenu will be displayed:
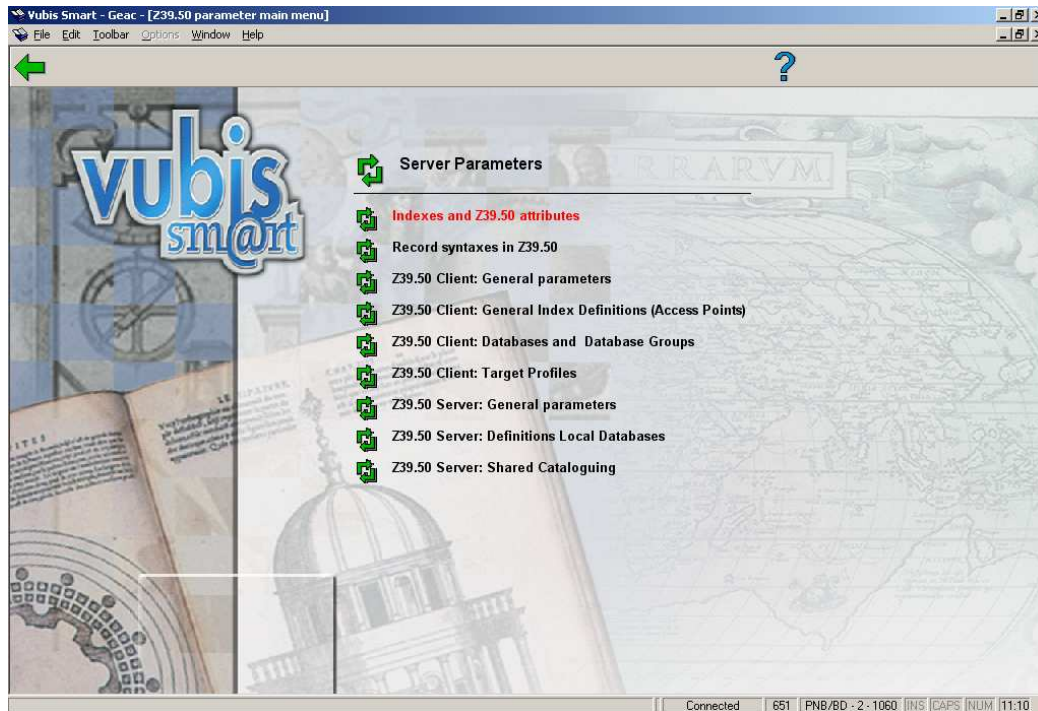
The first two options (*Indexes and Z39.50 attributes* and *Record syntaxes in Z39.50*) will **not** be covered. The last option (*Z39.50 server: Shared Cataloguing*) is meant for future use. See the release notes of version 2.2 for more information on shared cataloguing.

651.2.1 Z39.50 Client : General parameters

After choosing this option the following form will be displayed:

General Client Parameters

API Host	127.0.0.1
API Port	12346
First Port	10000
Last Port	11000
Language	English
Log?	☑
Protocol Version	3
Options	111000010010001
PreferredMessageSize	25000
ExceptionalRecordSize	25000
ImplementationId	Geac Vubis Smart Client
ImplementationName	Geac Vubis Smart Client
ImplementationVersion	2.1
System name	

Only two parameters are interesting here:

- API Port

  - This should be the same as PORT_CLIENT in VubisSmartZ39Api.ini. (See Chapter 1)

- Log

  - If this is ON, all messages are logged in ^SysLog.

Example:

^SysLog("Z3950Client","!VUBIS-LOCAL",1,"request")=10/14/2004 10:22:44

^SysLog("Z3950Client","!VUBIS-LOCAL",1,"request",1)=<Z39.50 Request>
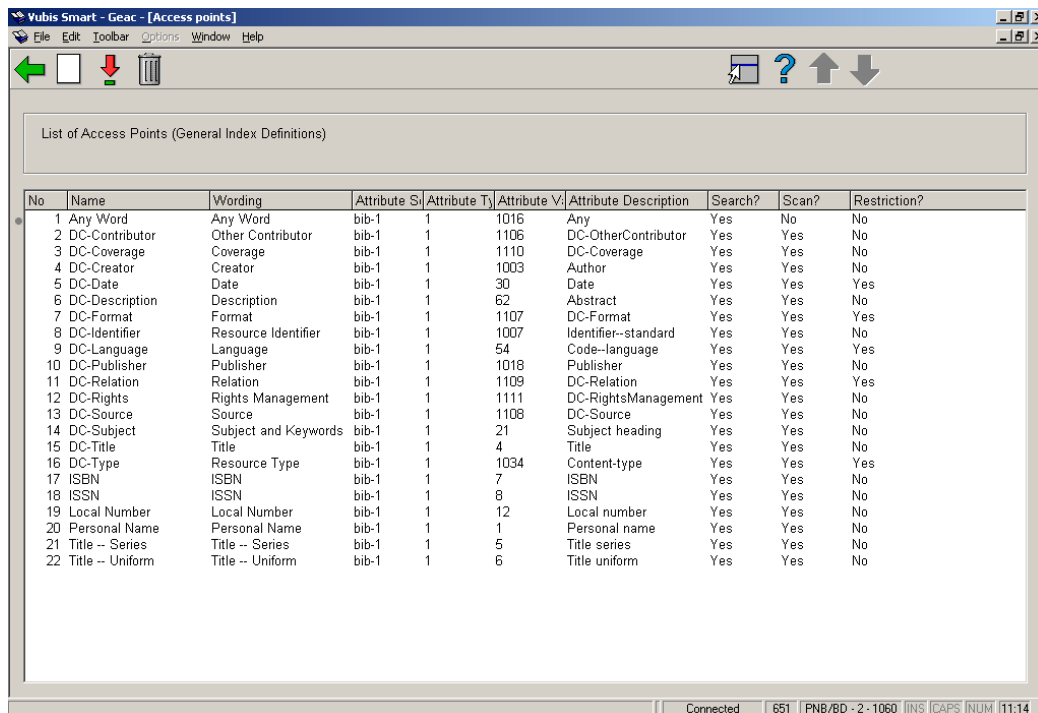

^SysLog("Z3950Client","!VUBIS-LOCAL",1,"request",2)=<Technical>

^SysLog("Z3950Client","!VUBIS-LOCAL",1,"request",3)=<RequestType>

^SysLog("Z3950Client","!VUBIS-LOCAL",1,"request",4)=Associate

651.2.2 Z39.50 Client : General index definitions (Access Points)

After choosing this option an overview screen will be displayed with codes already defined:

- These access points give you, the searcher, access to search an index on the server.

- Probably you don't have to change this, but this is the list that is shown in AFO 111/ Z39.50.

- If you want some access points not to be shown, then remove them here.

- Also ^JZ3950Client will refuse to do a Scan for this access point if this is set to "No".

651.2.3 Z39.50 Client : Databases and Database Groups

This means: we define here, for our client, databases to connect to.

The database group has no specific parameters.

After choosing this option an overview screen will be displayed with codes already defined:

Select a database and click on the icon **Details** for more information, the following form will be displayed:

Database details

Name	!VUBIS-LOCAL
Wording for the user	Local Vubis Smart server (on localhost)
Internet Address	127.0.0.1
Port nr	210
Z39.50 DatabaseName	Bib/2
Comments	
In Use?	☑
Ask for login and password?	☐
Group (for login)	
Login name	
Password	
Repeat Password	
Supports browse (Z39.50 Scan?	☑
Supports 'Named result sets'	☑
Preferred Record Syntax	Smart
Import profile (for conversion)	Z3950-Smart (Bib)
Export profile (for Shared Cataloguing)	z3950-Smart (Auth)
Scan terms have the character set defined in the Profile	☑
Element set name	F
Server type	Geac Vubis
Local data (for Shared Cataloguing)	☑ Impression ☑ Location ☑ Material type

[OK] [Cancel]

The database definition has a lot of parameters. Some are clear (hopefully), some are not important. But check the details for the database definition that you want to use.

The parameters that you should care about are especially:

- Preferred Record Syntax:

    - Ask the syntax that you want to be displayed in your Vubis Smart client.

If the server does not support that, see example below.

- Import Profile

    - Choose an import profile to change the character set or even to do a conversion in the fly (these profiles are defined in AFO 133).

Example:

You have a UNIMARC database and the server has a Smart database. Suppose that the server cannot export its records in UNIMARC. In that case you would ask Smart as **Preferred Record Syntax** and you would choose an **Import Profile** (defined in AFO 133) that does a conversion Smart-UNIMARC (defined in AFO 134).

651.2.4 Z39.50 Client : Target profiles

For your search you have to define a Target profile, a Database group and a Database.

A Target profile is what you see in AFO 111 when you do a Z39.50 search.

A Target profile consists of one or more database groups.

A database group consists of one or more databases.

After choosing this option an overview screen will be displayed with codes already defined:

Select a profile an click on the icon **Display/Modify** for more information, the following form will be displayed:

Modify a Target Profile

Field	Value
Name	!Call92251
Wording	!Call92251
Comments	

Database Groups

!Auth	Ceredigi
!BOG	
!Bogu	
!Loca	
!Marc	
!VUB	

Matching Profile

Database(s) for Matching Profile

.Wor
Auteu
Auteu
Autho
Back

Field	Value
Use database for record characteristics	Bibliographic database(B
First Search: No retrieve when hits >=	10000
First Search: Maximum to retrieve=	20
First Search: Per Present Request=	10
Time out after ... seconds	30
OID for shared cataloguing	
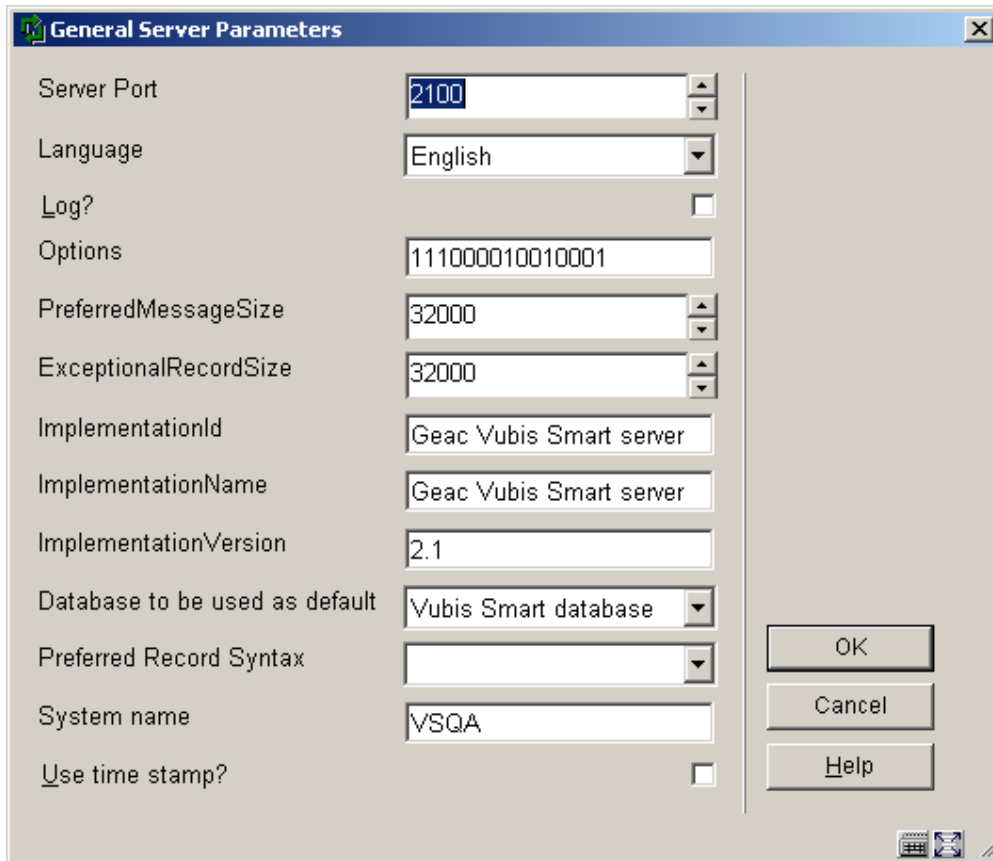
[OK] [Cancel] [Help]

Two parameters here need our attention:

- Use database

    - The Z39.50 client needs to store temporarily the records it receives. This is the Use database parameter (the databases are defined in AFO 151).

- First Search: No retrieve when hits >=

    - This is Z39.50 parameter: When Search finds more than the number of records here defined, the client will not try to retrieve the record. You see then a message like "12.000 found - 0 retrieved". So put here a high number, e.g. 999999.

651.2.5 Z39.50 Server : General parameters

After choosing this option the following form will be displayed:

Three parameters are really interesting here:

- Server Port

    - This should be the same as PORT_TO in VubisSmartZ39Api.ini. (See Chapter 1)

Note

This is not the external port number. This port number is only used by the server API. The external port number, that means the port that somebody can search, is the port where the server API is running (PORT_FROM in VubisSmartZ39Api.ini.)

- Log

- If this is ON, all messages are logged in ^SysLog.

- Database to be used as default

 - This means that when a client searches a databases "default", this request is transferred to the database defined here (for example Bib/1).

651.2.6 Z39.50 Server : Definitions Local Databases

Here are defined all the databases than can be searched through Z39.50.
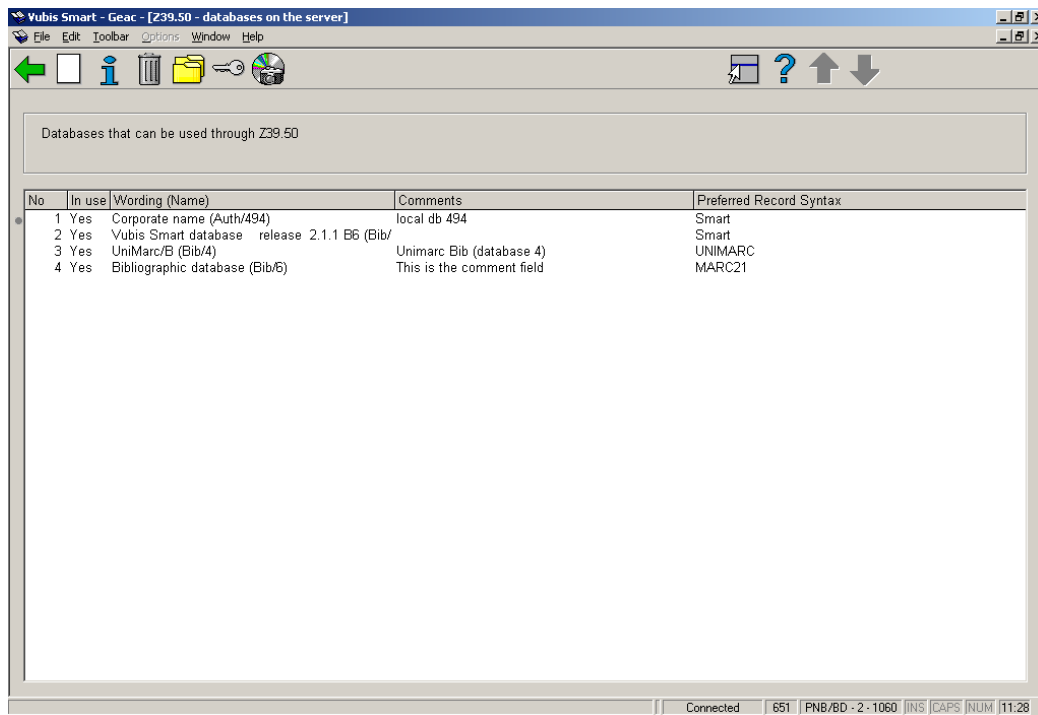
After choosing this option an overview screen will be displayed with codes already defined:

Two options are important here:

Select a database and click on the icon **Index definitions**. This leads us to a definition of indexes:

The indexes in the column **Vubis Index or Restriction** are indexes defined AFO 151.

Select a database and click on the icon **Syntaxes**. This leads us to a screen where the relation between record syntax and profile is defined:
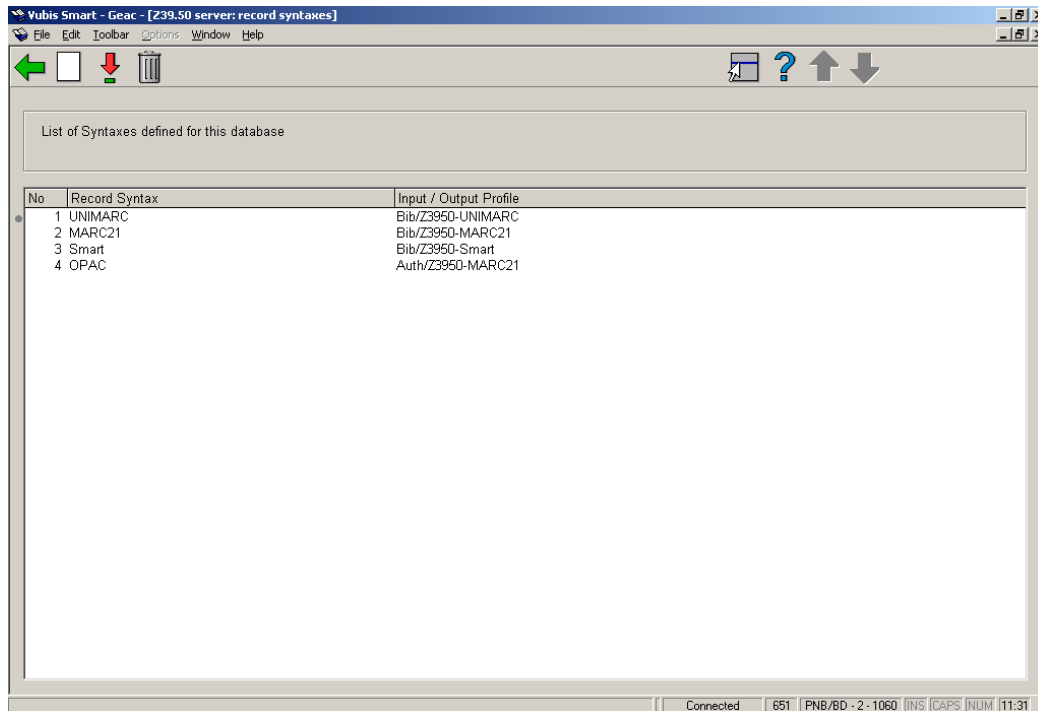
In this example the following happens: If the Z39.50 client asks for UNIMARC, the profile Bib/ISO2709 is used by the server to export its records. These profiles are defined in AFO 133.

651.3 Text manager

With this option you can trace certain text strings within the application and optionally change them. Please be careful with this functionality and do not replace texts without discussing this with Infor.

After choosing this option a submenu will be displayed:
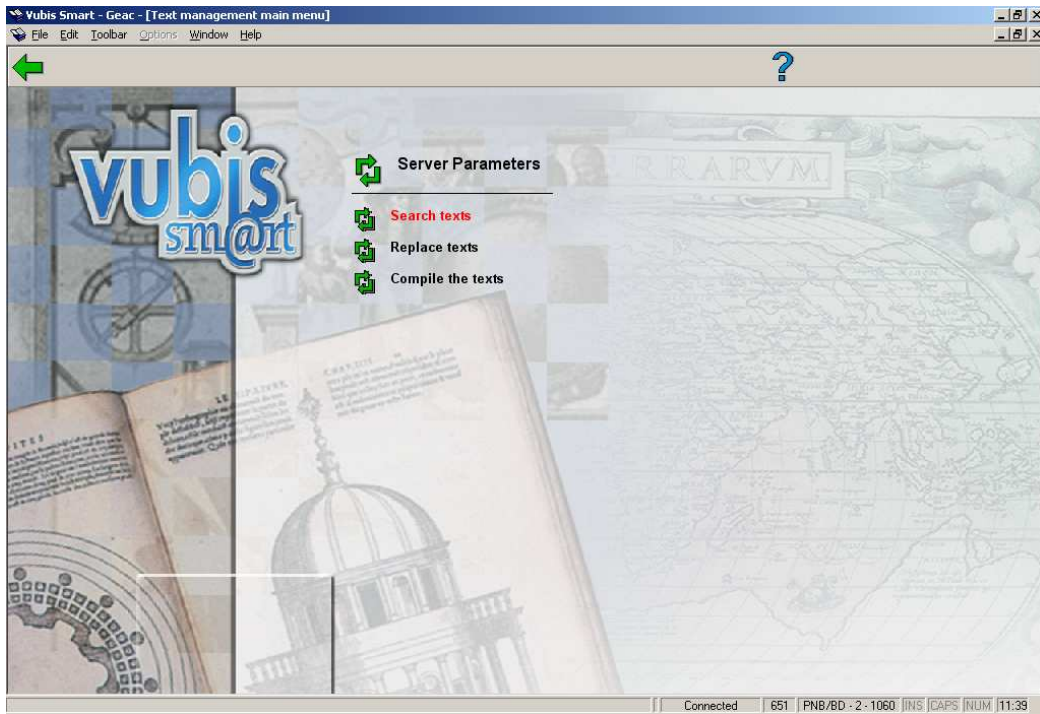
651.3.1 Search texts

After choosing this option the following form will be displayed:
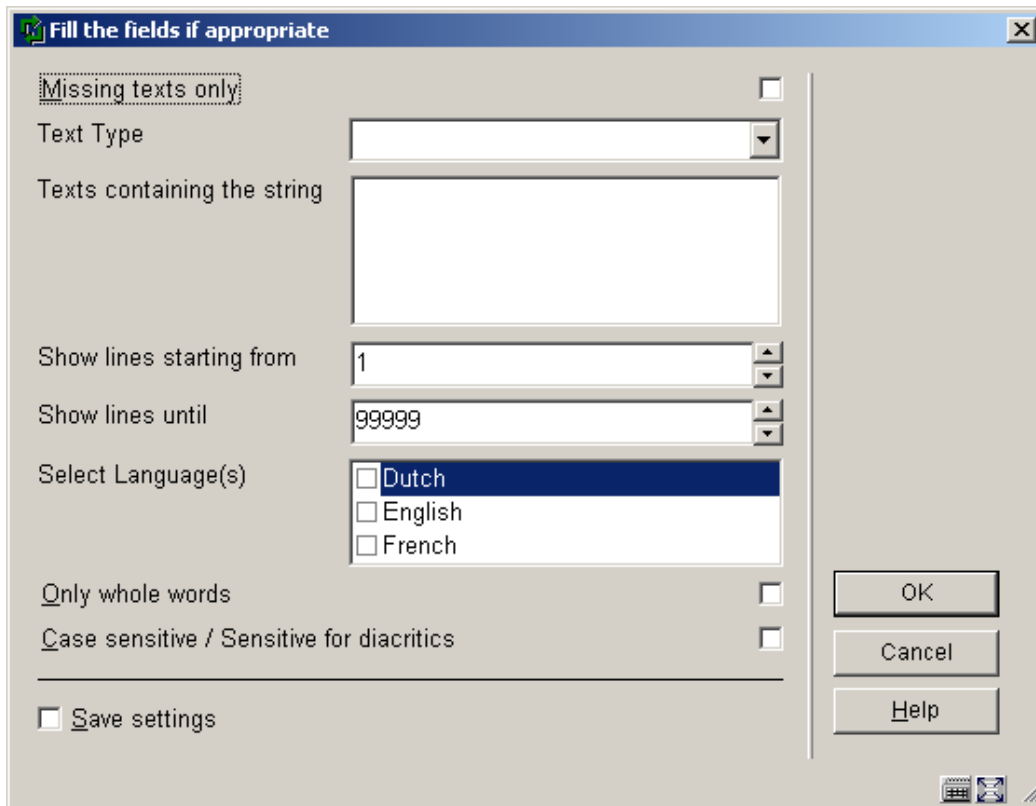
Fields on the screen

Missing texts only: If the user marks the box, only text lines containing [EMPTY] and [NO LINE] are selected.

Text type: Text Type is a drop down list. Text Type may be left empty.

Texts containing the string: Anything is allowed except ^.

Show lines starting from: This is the relative number in the select list that will be created when clicking on **OK**.

Show lines until This is the relative number in the select list that will be created when clicking on **OK**.

Select language(s) You can select 0-3 languages. Selecting 0 languages means selecting all 3 languages.

Only whole words: If the user marks this box, only strings on word boundary will be retrieved. This means that the character preceding the string and the character after the string (if any) must be not alphabetic and not numeric.

Case sensitive / sensitive for diacritics: If the user marks the box, all characters are taken literally. If not, two things are done for comparison:

- Translation of diacritic characters:

  - these characters: "ÇüéâäàåçêëèïîìÄÅÉôöòûùÿÖÜáíóúñÑ"

  - become the characters:
    "CUEAAAACEEEIIIAAEOOOUUYOUAIOUNN"

- All characters are converted to upper case.

The select list displays the result. Clicking on the OK button on the Search Form leads to a message indicating 0 found, or to the following select list:

The lines are sorted per language chosen.

- If English is selected and Dutch is selected, the order is English-Dutch-French.

- If English is selected and Dutch is not selected, the order is English-French-Dutch.

- If English is not selected and Dutch is selected and French is selected, the order is Dutch-French-English.

- If English is not selected and Dutch is selected and French is not selected, the order is Dutch-English-French.

- If English is not selected and Dutch is not selected and French is selected, the order is French-English-Dutch.

- If English is not selected and Dutch is not selected and French is not selected, the order is English-Dutch-French.

For sorting, every character is set to upper case. The blank and the following characters are eliminated:

```
`!$%^&*()_-+=["]{};'#:@~,./<>?\|
```

Due to internal limitations, the maximum length of the string is 200 characters minus the ApplicationId and minus another value. Practically, the maximum length will in general be between 100 and 170 characters.

Options on the screen

View/modify item: After choosing this option the following form will be displayed:

Modify the texts under **User text** in the various languages (if required).

Note

The text between pipes or between hashes (#)cannot be modified.

The number of underscores in the text cannot be modified.

The maximum for length for Button texts is 40 characters.

Filter: This option leads the user again to the Search Form, but with the last used Form content:
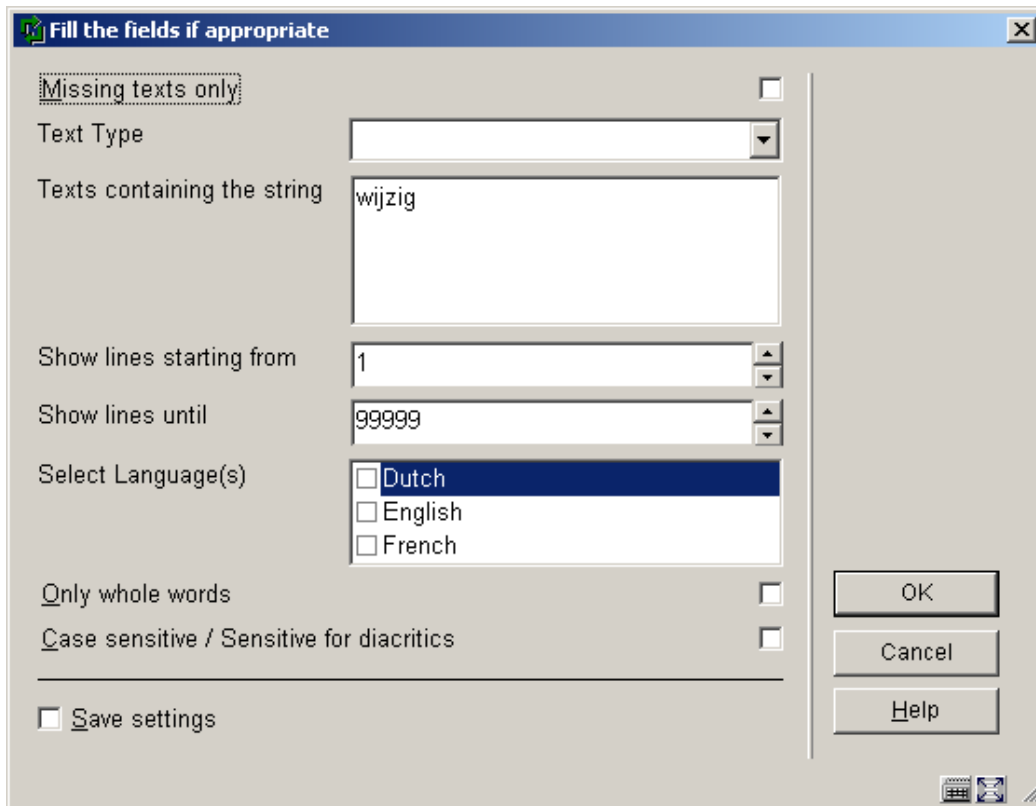
By making a choice here you can change the display of the result list. For example: show less lines, show lines also containing ….., etc.

Replace: This takes you to the option **Replace texts** (see section 651.3.2).

Compile: This takes you to the option **Compile the texts** (see section 651.3.2).

651.3.2 Replace texts

Never do this without consulting Infor first.

After choosing this option the following form will be displayed:
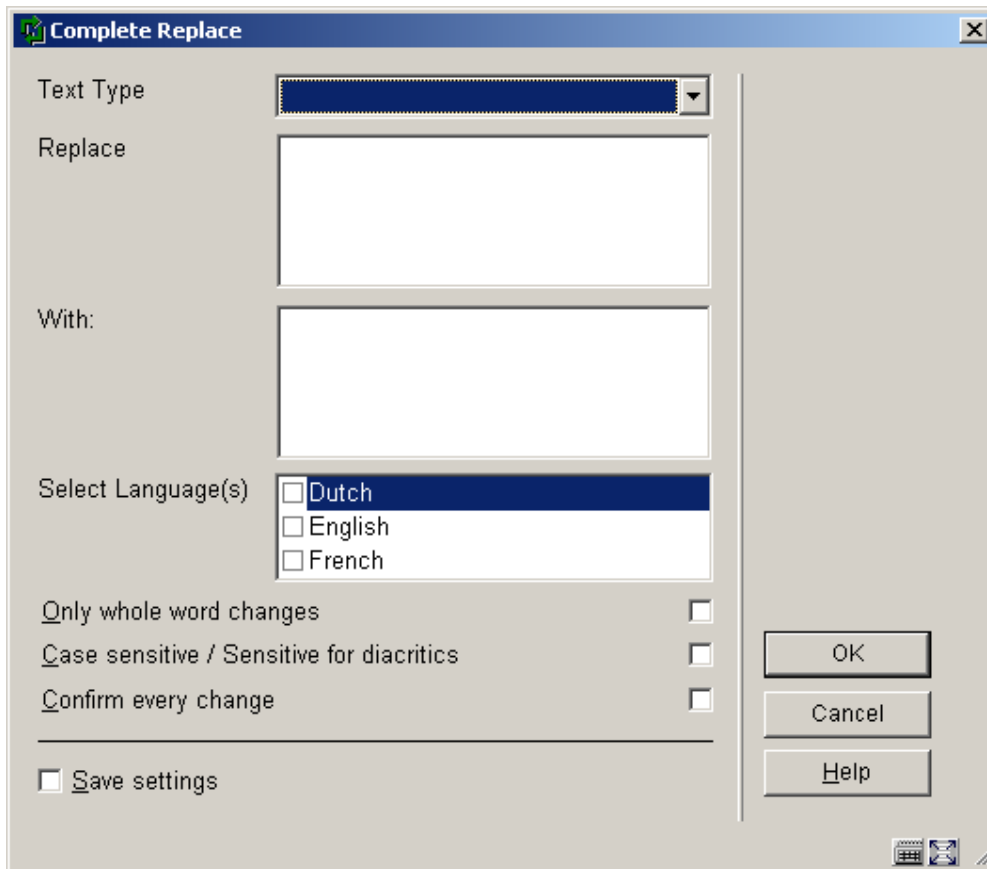
Fields on the screen

Text type: make a choice from the dropdown list. This is optional.

Replace: Here enter the characters in the original text that should be replaced.

With: Here enter the characters that should replace the characters in the previous entry..

Select language(s) You can select 0-3 languages. Selecting 0 languages means selecting all 3 languages.

Only whole words: If the user marks this box, only strings on word boundary will be retrieved. This means that the character preceding the string and the character after the string (if any) must be not alphabetic and not numeric.

Case sensitive / sensitive for diacritics: If the user marks the box, all characters are taken literally. If not, two things are done for comparison:

- Translation of diacritic characters:

  - these characters: "ÇüéâäàåçêëèïîìÄÅÉôöòûùÿÖÜáíóúñÑ"

  - become the characters:
        "CUEAAAACEEEIIIAAEOOOUUYOUAIOUNN"

- All characters are converted to upper case.

Confirm every change:

If the user **does not** mark this box, the following Message is shown:
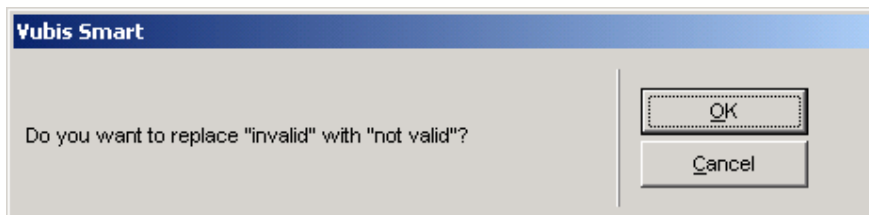
At the end the total number of modifications will be displayed:
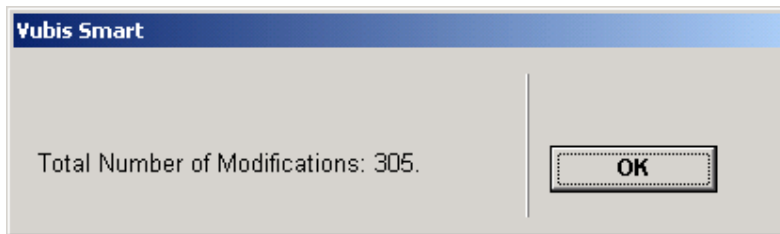
If the user **does** mark this box, the following Form will be shown for each line found.

```
@TextMgtFormReplOne - Complete Replace: Replace one by one          [X]

Original text:        Institution (or location) not defined
                      or format is invalid.



New text:             Institution (or location) not defined
                      or format is not valid.

                                                              [  OK  ]

For info: Global in current language  DM(1002,E,6)=Institution (or    [ Cancel ]
                      location) not defined or format is
                      invalid.                                 [  Help ]

                                                              [  Skip ]
```
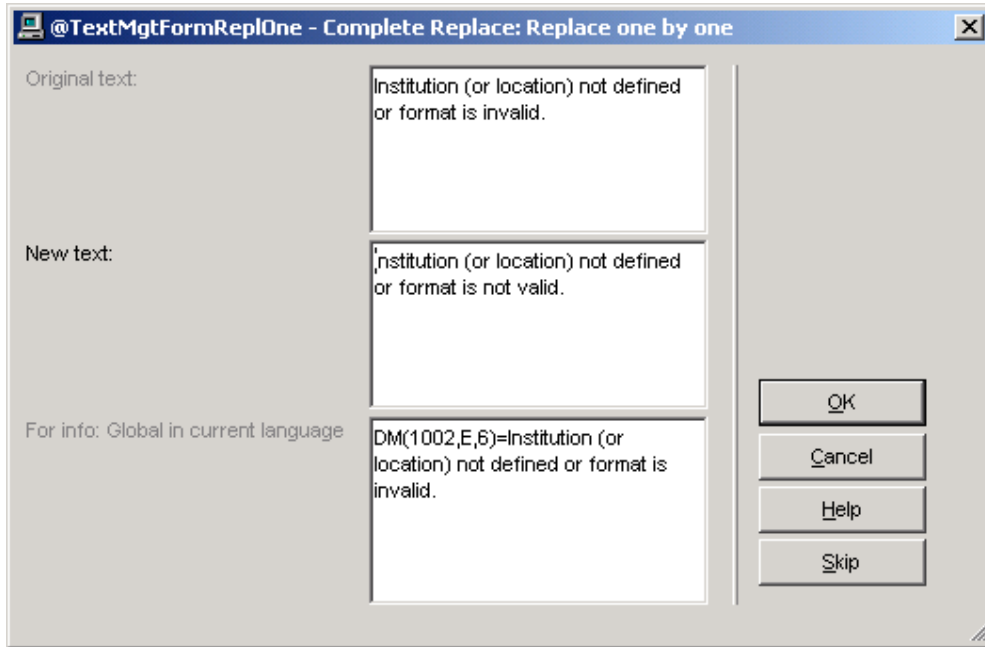
The button **OK** modifies the line and goes to the next valid line.

The button **Skip** does not modify this line and goes to the next valid line.

The button **Cancel** does not modify this line and stops the whole operation.

If a Button text is found with a length of more than 40 characters, a message is shown and the Replace operation is stopped.

If Replace is done without confirmation for every change, the error message shows also the new text that provoked the error.

The Replace function ignores the text between pipes and does not treat the texts [EMPTY] or [NO LINE].

You can type a Replace string containing pipes or hashes, in two conditions:

- o The Original text and the New text between pipes/hashes should be the same

- o There should be an even number of pipes/hashes in the Original text.

The number of underscores in the text cannot be modified.

651.3.3 Compile the texts

Never do this without consulting Infor first.

651.4 Custom barcodes

This feature is designed to provide custom-defined barcode formats for borrower and item barcodes (primarily in the circulation module, but also when adding items to bibliographic descriptions, etc.). The aim is to allow a wide variety of barcode formats to be catered for, eliminating the need for additional programming specific to individual Vubis Smart customers.

This will be achieved by providing a number of variable parameters which may be selected in varying combinations to allow the validation required for a particular barcode format. It will be possible to define multiple formats for both borrower and item barcodes.

The main features include:

- Multiple formats may be defined for both borrower and item barcodes.

- Formats are fully customisable, catering for many barcode formats.

- Multiple formats can be used for both borrower and item barcodes.

- Existing customers may continue to use their existing barcode routines, allowing them to change to use custom-defined barcode formats at their convenience.

Note

It is important to realise that, if you are either already using older versions of Vubis Smart or if you are migrating from older Vubis versions (Vubis Original or Vubis 4 Windows), you are in no way obliged to start using this new feature.

The system is completely backwards compatible and you can continue to use the existing test procedures for both borrower and item barcodes.

After choosing this option a submenu will be displayed:
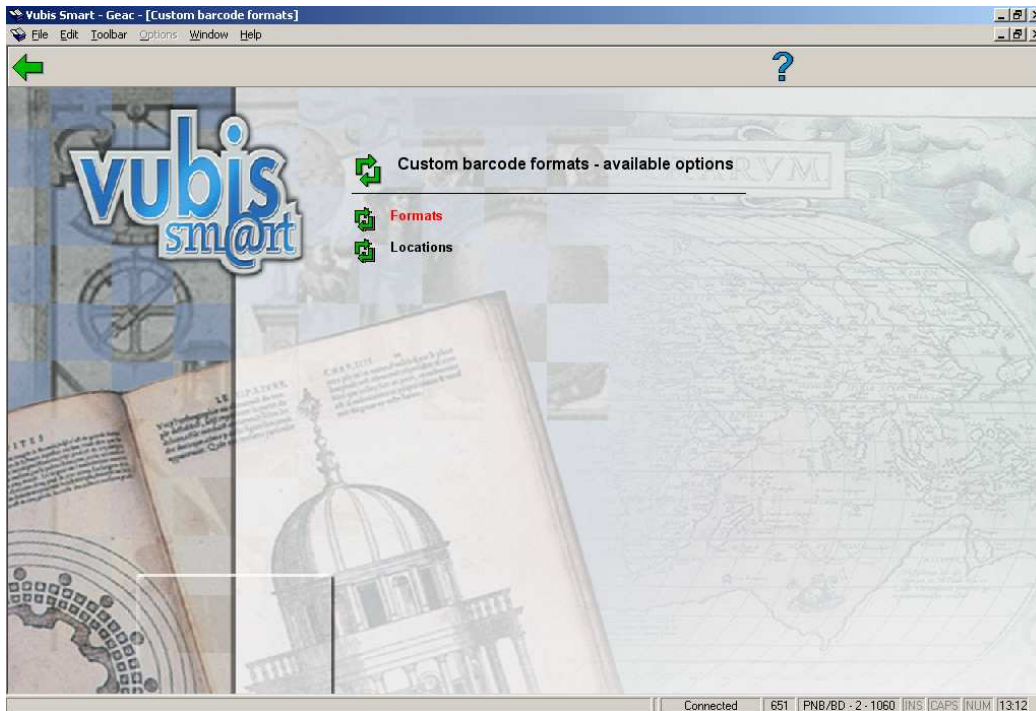
If you select AFO 651, section "Custom barcodes", the system offers you the choice between two features: managing formats and managing locations. The relation between these two concepts is as follows: you first define one or more formats, for items and/or borrowers, which you then link to one or more locations.

The system allows you to define one or multiple barcode format profiles and link these to institutions/locations. One institution/location can link to multiple barcode profiles, and one barcode profile can be linked to multiple institutions/locations.

The system displays all available barcode format profiles for borrowers and items.

651.4.1 Formats

Each barcode format profile allows you to define the properties of the barcodes. The properties are grouped in four categories:

- general

- check digit

- prefix

- suffix

After choosing this option an overview screen will be displayed with codes already defined:

Options on the screen

New format: Select this option to define a new format. See section 651.4.1.1 for more information.
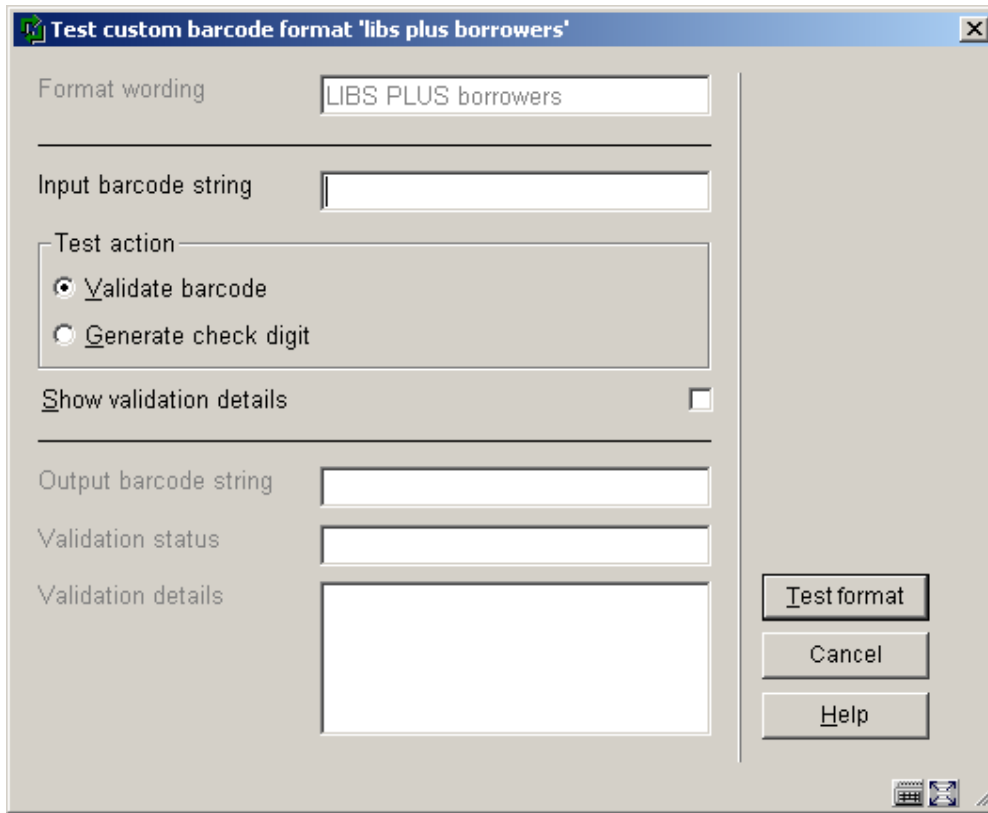
Modify format(+): Select a format and choose this option to modify the parameters of this format. See section 651.4.1.1 for more information.

Delete format(+): Select a format and choose this option to delete the format.

Copy format(+): Select a format and choose this option to create a new format based on the parameters of the chosen format.

View format properties(+): Select a format and choose this option to look at the general properties of the format.
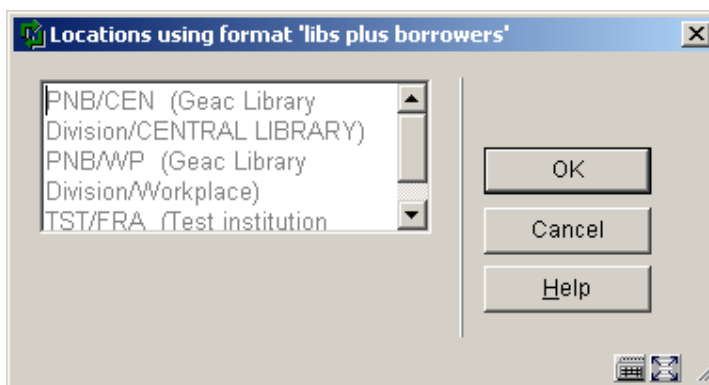
Test format(+): Select a format and choose this option to test the format definition. You need to enter a barcode.

Locations using format: Select a format and choose this option to see which locations are using this format. This is for information only, you cannot make modifications on this screen.

651.4.1.1 New format

After choosing this option the following form will be displayed with four tabs. These tabs will be described individually.

Tab 1 – General

Fields on the screen

Format name – This is the ID of the format and must be unique. When updating parameters this field cannot be changed.

Format type – This is "Borrower" or "Item".

In use – Set this flag to Yes if the profile may be used, and to No if it is not be used.

Wording of format – – Use this field to give the profile a meaningful wording (description).

Alphabetic case – This is either Unchanged (input is not changed), Lower case (input is transformed to lower case) or Upper case (input is transformed to upper case).

Format pattern – This allows you to define a format pattern to which a barcode must comply. The format patterns are defined using the regular Vubis Smart format pattern definition characters.

Drop surplus trailing characters – If the input is longer than the length expressed in the format pattern, the system will drop the trailing characters, if this flag is set to Yes.

Number position This is defined as a start and end value, separated by a hyphen, and indicates begin and end value of the numeric part of the barcode.

Pad with leading zeros If the input is shorter than the required number of numeric characters, the system will automatically pad leading zeros to the input, if this flag is set to Yes.

Tab 2 – Check digit

The defined parameters determine calculation of the check digit.

Fields on the screen

Barcode includes check digit – Set this flag to Yes if the barcode includes a check digit.

Include prefix in check digit – Set this flag to Yes if the prefix has to be taken into account for the check digit calculation.

Modulus – Select the modulus value (e.g. 10).

Weight values – Set the weight values of each digit in the numeric part of the barcode string. The digits are separated by comma's.

Sum of weights rule – This is either "Add weight products" or "Add digits of weight products". "Add weight products" will add the weight product to the calculated figure; "add digits of weight products" will add the total of the digits of the weight product to the calculated figures.

Don't subtract remainder – Set this flag to Yes if the system does not have to subtract the remainder of the modulus calculation.

Use 0 for Mod 11 check digit X – Set this flag to Yes if the system if the system has to use 0 for modulus 11 check digit X.

Tab 3 – prefix

Fields on the screen

Prefix(es) – You can enter a list of prefixes, separated by comma's, that are replaced by the corresponding prefix in the "Replacement prefix(es)" list.

Replacement prefix(es) – You can enter a list of replacement prefix(es), separated by comma's, that will replace the corresponding prefix in the "Prefix(es)" list.

Prefix must be input Set this flag to Yes if it is mandatory that the prefix is part of any input.

Default prefix – The prefix that will serve as default.

Invalid prefix action – This value can be either "Generate error" or "Ignore invalid string". If an invalid prefix is detected, the system will either generate an error, or ignore the invalid string, and process further.

Tab 4 – Suffix
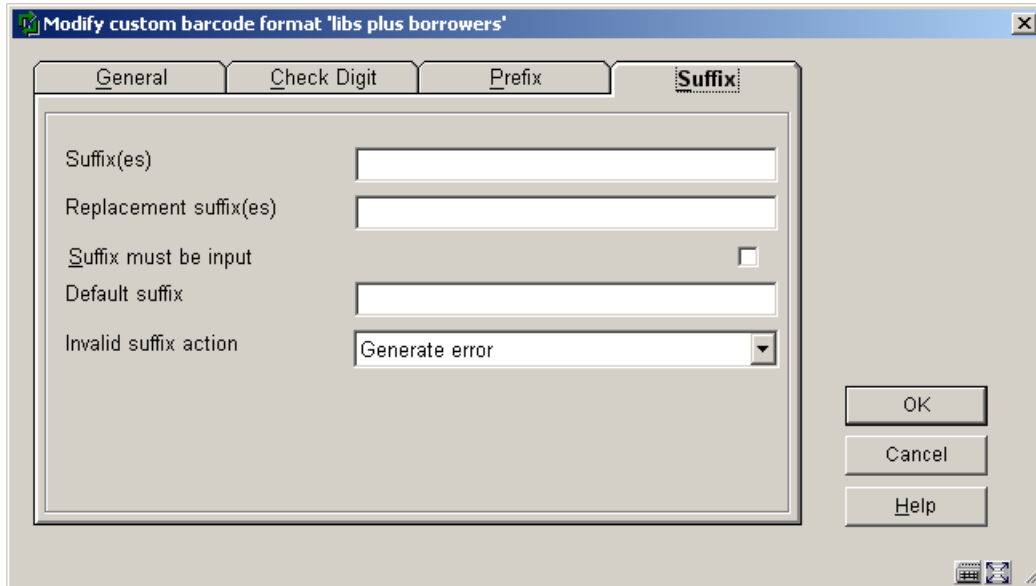
Fields on the screen

Suffix(es) – You can enter a list of prefixes, separated by comma's, that are replaced by the corresponding suffix in the "Replacement suffix(es)" list.

Replacement suffix(es) – You can enter a list of replacement suffix(es), separated by comma's, that will replace the corresponding suffix in the "Suffix(es)" list.

Suffix must be input Set this flag to Yes if it is mandatory that the suffix is part of any input.

Default suffix – The suffix that will serve as default.

Invalid suffix action – This value can be either "Generate error" or "Ignore invalid string". If an invalid suffix is detected, the system will either generate an error, or ignore the invalid string, and process further.

651.4.2 Locations

The option "Locations" will show you an overview of the locations that are defined for your system, grouped by institution.

After choosing this option an overview screen will be displayed with codes already defined:

If you select a location, the system will allow you to define the custom barcode properties for this location. These are:

Define whether or not custom barcode formats should be used and select the borrower and item formats that are valid for the selected location by moving them to the right.

651.5 Client

Please leave the maintenance of these parameters to Infor.
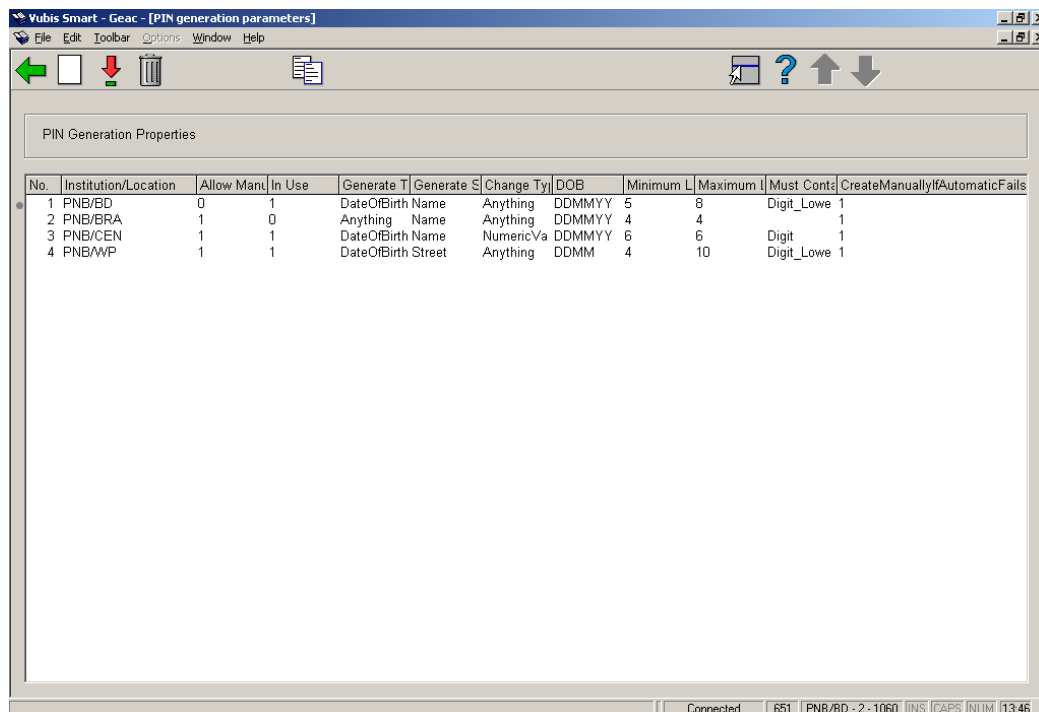
651.6 Custom PIN codes

The borrower record in AFO 431 has an optional feature for generating PIN codes for use in the WebOpac. In order to activate this option you must set the following parameter:

AFO 481 Main circulation parameters – Miscellaneous – Circulation workflow – Borrowers – Activate optional features.

The means of generating a PIN code from the borrower record in AFO 431 are defined here..

After choosing this option an overview screen will be displayed with codes already defined:

Options on the screen

Change properties(+): Select a code and choose this option to change the parameters.

Delete parameters(+): Select a code and choose this option to delete the code.

Copy parameters(+): Select a code and choose this option to copy parameters of a specific location to another location.

Add new parameters: Choose this option to define new parameters. After choosing this option the following form will be displayed

:

Choose from the dropdown list and click **OK**. An input form will be displayed:

Fields on the screen

Allow manual changes: tick to allow manual changes.

In Use: tick to enable PIN code generation for this location.

Generate type: this is used in conjunction with the rest of the fields.

Select **Date of birth** then the **DOB format** field is relevant and you must select Digit in the **Must contain** field. If you select **Anything** then a random code is generated dependent on the **Must contain** options selected.

Generate secondary type: also used in conjunction with the rest of the fields. This field is used if the primary Generate type fails. You can select fields from the borrower record, such as Name.

Change type: this field is not in use.

DOB format: select the format from the drop-down box. Only used if you select Date of birth as the primary type. Ensure that the Minimum length corresponds to the format selected and allow for any delimiter spaces.

Minimum length: enter a number for the minimum length of a PIN code

Maximum length: enter a number for the maximum length of a PIN code

Must contain: select at least one option from the left side. If Date of birth is selected as the type then the right side must contain Digit.

Create manually if automatic generation fails: tick to allow manual creation. This allows staff to create a PIN code if the generate type and generate secondary type fails. The PIN code must still adhere to the parameters for type, minimum and maximum and Must contain.

Note

The AFO 651 parameters do not have to be defined as **Date of Birth** in the **Generate type** parameter.

The default for automatic generation of a pin code is set in AFO 482, Circulation parameters ; borrower administration, Automatic pincode generation.

651.7 SDI parameters

The purpose of SDI (Selective Dissemination of Information) is to inform borrowers when items that may interest them become available in the library.

When a new item is entered into Vubis Smart, the system registers the date that it is entered. It is also possible for the librarian to reset the availability for an item to the current date.

At a regular interval (for example every night), the SDI processing job will run. This will look at all items that have become available since the last time it was run, and compare them to criteria set by the borrower. If the item matches the criteria, then it is added to a list of items that may interest the borrower. When this list reaches a set number of records, or number of days since the last notification, the system can notify the borrower via email of the newly available items.

The borrowers define their interests through SDI profiles defined in the WebOpac. Each profile contains a number of queries. A query is based upon a normal WebOpac search. The SDI process will generate results for each profile based upon its queries.

Note

Please note that the SDI feature will not be activated automatically on your system. Infor will have to activate the feature on your site before you will be able to use it.

Note

Apart from the parameters defined here, you will need to set parameters in the WebOpac references in order to be able to use this functionality.

After choosing this option a submenu will be displayed:
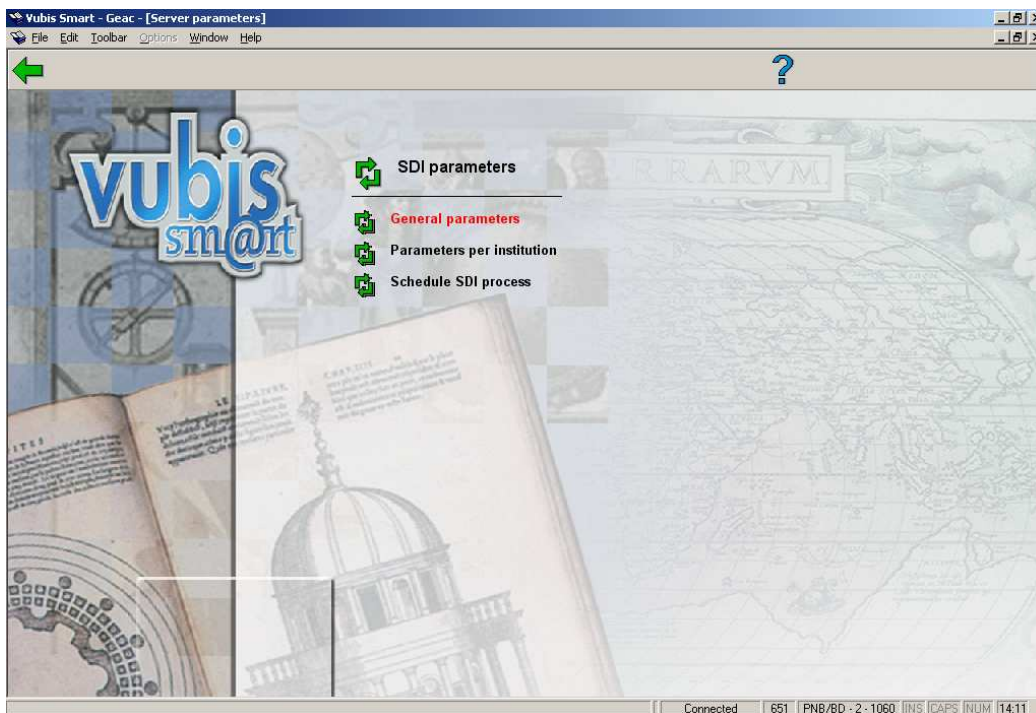
- General Parameters

  - This is where you define system wide SDI parameters

- Parameters per institution

  - This is where you define SDI parameters for the current institution

- Schedule SDI Process

  - This is used to schedule the SDI process

Note

Some of the Institution parameters duplicate the general parameters. Institution level parameters will always override general parameters.

651.7.1 General Parameters

After choosing this option the following form will be displayed:

Fields on the screen

Use Automatic Availability Date: Automatically determine the availability of items based upon the date that the item is entered.

Automatic Availability Date Offset: Set the automatically generated availability date to a number of days after the item is entered on the system.

Maximum Period Results are Saved For: Discard entries in an SDI profile's result list after this number of days.

Users are allowed to use SDI by default: Use this to determine whether users (other than those specifically denied access to SDI) have access to SDI.

WebOpac URL: This is used to create a link in the notification email. Only the base of the URL is necessary: if the URL used to access WebOpac is http://opac.vubis.test/VWeb/Vubis.csp, then this field should contain http://opac.vubis.test/VWeb/

WebOpac Profile: This is used to create a link in the notification email.

Search Level: This determines whether the SDI criteria are checked for only the borrower's location, the borrower's institution, or the whole system.

Mail Server (SMTP) Address: This is the mail server that will be used to send the SDI notification emails. You will most likely want to use the same mail server as you have defined for the WebOpac. Luckily, this is the default.

Send Notifications From (Email Address): This is the email address that will appear in the "From" field of the generated email.

Note

The WebOpac URL field provides the prefix portion used to generate SDI links for borrower email notification. This is the URL for launching the start page in the WebOpac minus the CSP page being launched. The trailing '/' is required. For example, the link to the WebOpac is: http://yoursite/webopac/vubis.csp The setting(s) for the WebOpac URL field is: http://yoursite/webopac/. The Web OPAC Profile field specifies which interface profile should be used as part of the SDI link.

651.7.2 Parameters per Institution

This form allows you to set parameters that are specific to the current institution.

After choosing this option the following form will be displayed:

Fields on the screen

Use Automatic Availability Date: Automatically determine the availability of items based upon the date that the item is entered.

Automatic Availability Date Offset: Set the automatically generated availability date to a number of days after the item is entered on the system.

Maximum Period Results are Saved For: Discard entries in an SDI profile's result list after this number of days.

Users are allowed to access SDI by default: Users will have access to SDI unless specifically disallowed.

Users access by location: Users at the selected locations will have access to SDI.

User access by borrower category: Users in the selected categories will have access to SDI.

WebOpac URL: This is used to create a link in the notification email. Only the base of the URL is necessary: if the URL used to access WebOpac is

http://opac.vubis.test/VWeb/Vubis.csp, then this field should contain
http://opac.vubis.test/VWeb/

WebOpac Profile: This is used to create a link in the notification email.

Note

The WebOpac URL field provides the prefix portion used to generate SDI links for borrower email notification. This is the URL for launching the start page in the WebOpac minus the CSP page being launched. The trailing '/' is required. For example, the link to the WebOpac is: http://yoursite/webopac/vubis.csp The setting(s) for the WebOpac URL field is: http://yoursite/webopac/. The Web OPAC Profile field specifies which interface profile should be used as part of the SDI link.

651.7.3 Schedule SDI Process

. From here you can schedule the SDI process to run.

After choosing this option the following form will be displayed:

This is the standard form for scheduling processes. See the relevant section of the Help for more information on scheduling processes.

Note

Note that you should not schedule the SDI process to run concurrently with an indexing process (AFO 157 and 158). This will slow down both processes significantly.

651.8 Performance data setup

This section describes a number of features that have been implemented to facilitate the selection process for acquisitions.

The overall goal is to help library staff with the selection process that leads to the actual ordering of records. In situations where files containing (new) bibliographic records that are

available for selection are imported into the system, the selection process will go faster and smoother.

The order process, up to the point of the actual ordering of records, looks as follows:

1. Import bibliographic records.

The bibliographic records are imported.

2. Selection, supporting *feature 1*: automatic record matching.

The system applies automatic matching of bibliographic records. The idea behind this record matching is that the system will refer the user to similar records.

3. Selection, supporting *feature 2*: provide "performance" data.

The system provides statistical circulation data for

- similar bibliographic records as retrieved with feature 1

- all records related to the authorities that are present in the current bibliographic record (grouped per authority)

Giving insight into the "performance" of the title. The idea behind this feature is that the selector will have quick and easy access to circulation performance statistics. For each "related" (i.e. "matched") bibliographic record and for each authority, this information can be accessed.

Also a numeric value will be attributed to every authority or bibliographic record as to reflect its "performance" – the higher the value, the higher its performance.

After choosing this option an overview screen will be displayed with codes already defined:
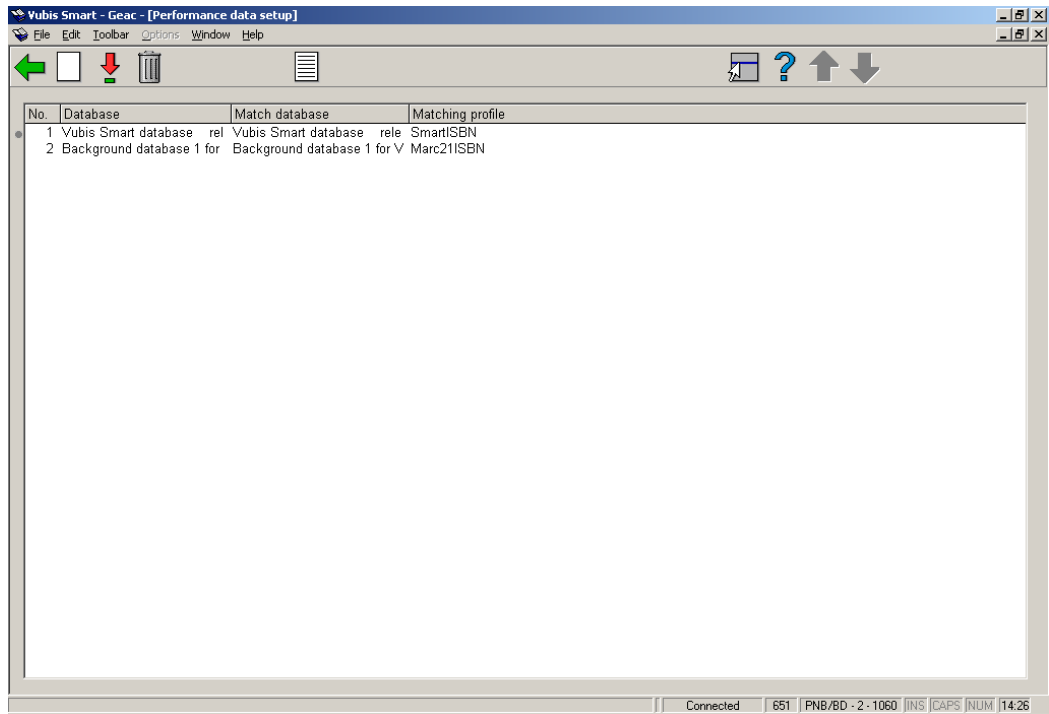
Fields on the screen

New item: Choose this option to define a new code. After choosing this option the following form will be displayed:

- Select the correct database (as defined in AFO 151) in **Database** and **Search database**.

- Select the right profile(as defined in AFO 114) in **Matching profile**.

View/modify item(+): Select a code and choose this option to modify the properties.

Delete item(+): Select a code and choose this option to delete the code.

General settings: Select a code and choose this option to modify the general parameters. After choosing this option the following form will be displayed:

- **Maximum bibliographic records linked to an authority** (if the number exceeds this maximum, the authority will not be included in the "performance data" group on the overview screen)

- **Maximum similar records to display** – only up to this maximum will be displayed in the "performance data" group on the overview screen

- **Show performance data for authorities** (e.g. "Authors", "Keyword 1") – only these authority types will be shown in the "performance data" group

- **Data to be shown** determine which groups must be displayed by moving them to the right.

651.9 C-Fly parameters

C-fly, or conversion-on-the-fly, is the functionality that is used to create bibliographic records and item records "on the fly". If items that are not available in the catalogue are presented at the circulation desk, the system will identify them and allow staff to create a "c-fly" record..

When an item with an unrecognised barcode is presented in Loans the system must allow the loan to proceed. This means a brief record must be created in order to allow the item to circulate.

Note

There is a location dependant parameter indicating whether C-fly is activated or not.

After choosing this option the following form will be displayed:

Tab – General

Fields on the screen

Activate c-fly: check whether you want to use the c-fly functionality

C-fly type: check whether you want to have a basic c-fly record, to go to a cataloguing option, or have both

- C-fly only – means the **Default option** (below) must be Create an automatic record or Link to an existing record. In **AFO 411** you will only have the option to create an automatic record or link to an existing record.

- Express cataloguing only – means the **Default option** (below) must be Create a manual record or Link to an existing record. In **AFO 411** you will only have the option to Create a manual record or Link to an existing record.

- Both options – any default option can be selected and all options are available in AFO 411.

Default option: set the default that will be offered in AFO 411 from the drop-down box

Database for c-fly records: select the database for storing c-fly records from the drop-down box

Template for c-fly records: select the template to be used for manual creation of a record in AFO 411 from the drop-down box

Template for express cataloguing: select the template to be used for automatic creation of the record from the drop-down box

Administrative manager: select the administrative manager who has to receive these items on their return from the drop-down box

Print slip for administrative manager: if this option is checked you can print a routing slip for the administrative manager after return of the item in AFO 412

Tab – C-Fly item record form

These parameters define default settings for the item, such as the location, material type and shelfmark, which are sued when the system automatically creates an item record.

Note

The library has the option to create special material types for c-fly items, so they can have different circulation parameters.

You can also indicate whether the user can modify the location, etc, when adding the c-fly item in AFO 411.

Note

The following authorisation options can be set in AFO 611:

- user is allowed to use c-fly

- user is allowed to create a new bibliographic record

- user is allowed to search for an existing bibliographic record

- user is allowed to edit existing bibliographic record

651.10 Miscellaneous cataloguing parameters

This option allows you to set various unrelated parameters for the cataloguing module.

After choosing this option the following form will be displayed:

Fields on the screen

Icons for status: It is possible to display different icons against each line in the result list of a bibliographic search. For each specific record status you can choose a different icon.

Relations: Relations can be handled in the record editor: the maximum number of relations for which relation fields will be shown in the record editor is here.

The recommended value for this parameter is 50. Make sure that it is at least high enough to use the record editor for the cataloguing of analytical records.

Note

New relations can always be created in the record editor, regardless of whether the new total number of relations would exceed the parameter.

Standard search method: This determines what the default search method is when doing an authority search from within the record editor in AFO 111, Cataloguing records. Staff can still choose another search method.

Automatically create search string for authority linking: if this option is set, then any text entered in authorised subfields defaults to the search expression for authority search.

Index to use for commercial barcode search: allows you to define which index is to be used on a Commercial barcode search. The default is "Index4" - however, if the index defined (or the default index) does not exist, then the Commercial barcode search option is not offered in AFO111.

651.11 Open URL parameters

V*Link* is Infor's information and resource product bringing access to information direct to your desktop. V*Link* is an "OpenURL resolver" or "link generator". The OpenURL standard is a syntax that has been created to offer open and context sensitive linking for references made in Web pages. It exchanges Web transportable packages of metadata and/or identifiers about an information object. Please contact Infor for more information.

651.12 Email and SMS parameters

This option allows you to define parameters for email and/or SMS configuration used for the generation of email or SMS notices to borrowers as well as WebOpac reservation confirmations. WebOpac confirmation notices can be optionally set up in the User Activities preferences. The site may define that a confirmation notice be sent to the borrower upon successfully placing a new reservation on the system.   General notices (overdue, reservation pickup etc.) are generated via AFO451/ 452.

After choosing this option the following form will be displayed:

Tab email
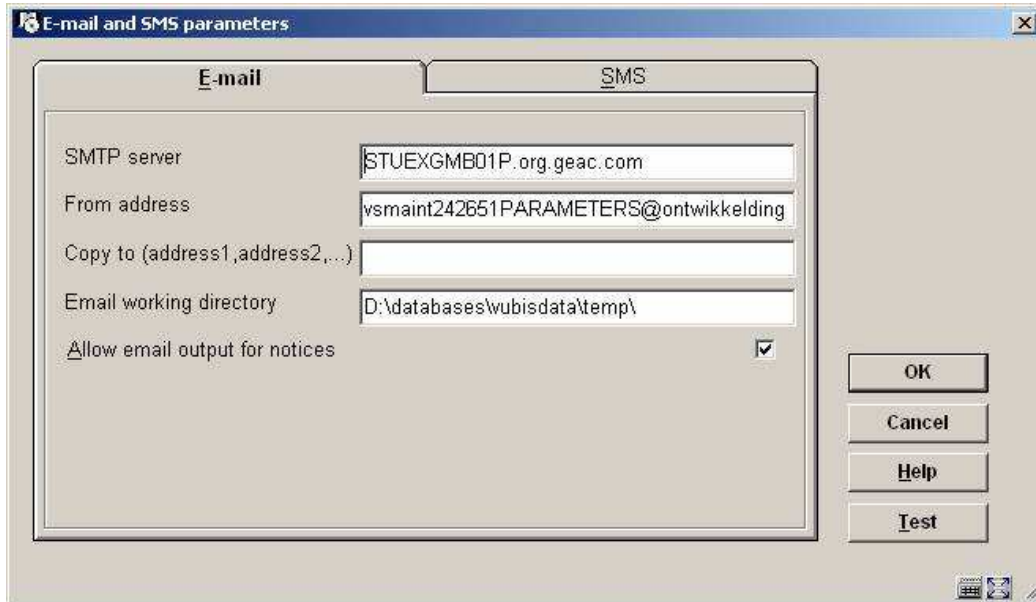
Fields on the screen

SMTP server: required - Enter the Name or the IP of the SMTP server for this site.

From address: required - Enter the sender address (your library) of the system generated email.

Copy to: Optionally enter email addresses to receive a copy of the email. Enter multiple CC recipients by separating them with a comma.

Email working directory: Email output which is generated by the server based email is sent to a temporary directory for the mail server. This directory is local to the Vubis Server. This directory is by default the same as the directory used for File./ Record Imports as well as the upgrade and stored in ^AFO("WINDOWS","UploadDir","ServerSide")=.

Allow email output for notices : If the parameter is ON, then Email output can be used for notice production. If the parameter is OFF, any contact methods / email output generated will be printed instead.

Note

Files are in the format em####.txt and are the contents of the email (previously sent as attachments). The Infor staff will set up a script to clear these files from this directory on a periodical basis as they will not be cleared from this directory automatically.

Tab SMS

Fields on the screen

SMS server: enter the IP address or machine name of the SMS gateway server that sends the SMS.

SMS port: enter the port for the SMS request, usually this is 80.

Location gateway server: enter the location (URL) of the SMS gateway server.

User name: enter the user name for gateway access.

Password: enter the corresponding password for gateway access.

Sender: enter the name of the originator of the message (your library).

Post to URL: enter the URL to request.

The **Test** button can be used to generate a test email (or SMS) to check your configuration. If a problem is encountered, an error message will be displayed. Confirmation of a successful test will be displayed on screen.

651.13 System date formats

With this option you can specify the date format as presented in the **WebOpac or for background processing when the workstation's date format is not known.** You can enter the desired notation for long and short forms of the date. It also controls the format for other dates which are not stored internally such as the date of birth on the borrower record, and it is used for batch or memory processing for reporting such as SSP.

Other dates for display or output in online mode are converted into the date format of your workstation as set in the Control Panel / Regional Settings / Customise / Date tab (see section 651.13.1).

After choosing this option an input form will be displayed:
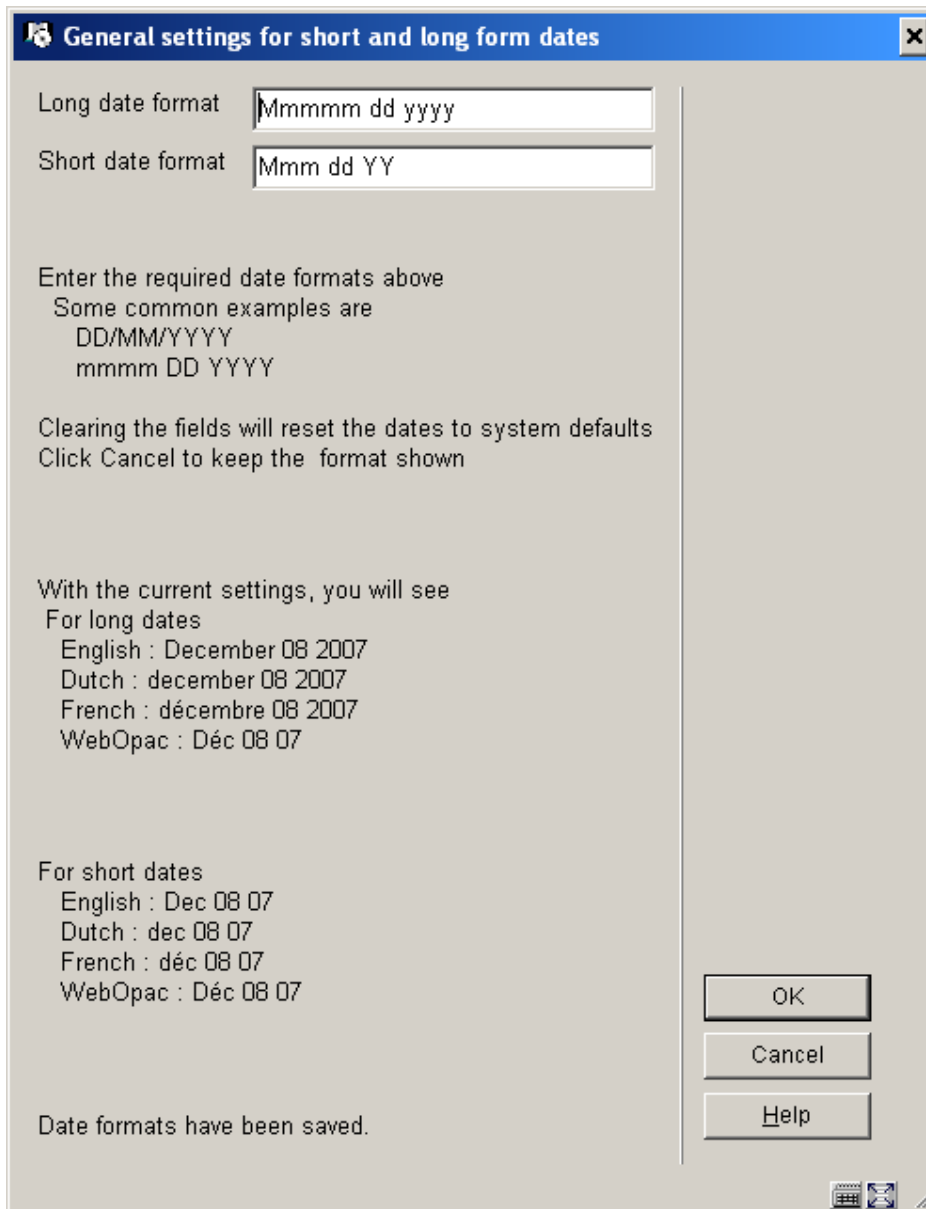
Fields on the screen

Long date format: enter the required notation for presentation of the full date.

Short date format: enter the required notation for presentation of the date in short format:

- 'D' is used to specify the numeric Day

- 'M' is used to specify the Month. f 1 or 2 characters are specified, a numeric month is used. If more than 2 characters are specified, the month is displayed in alpha characters (upper or lower case)

- 'Y' is used to specify the Year (2 or 4 digit year)

Next the system will display the result of the chosen notation on the input form in three languages.

651.13.1 Flexible date formats

General date entry, display and output (i.e. print or email) throughout Vubis Smart is in the format defined by the client's workstation Operating System instead of using a fixed format of DD/MM/YY. This allows the handling of region specific date formats (i.e. MM/DD/YYYY) and to remain consistent with the workstation and its users.

The setting that determines the date format is different between the Vubis Smart Client environment and the Vubis Smart WebOpac environment.

WebOpac

Since a browser cannot access the settings in the Operating System, the date format to be used in the Vubis Smart WebOpac must be defined in the application. This is done in AFO651 – System date formats.

This AFO is used to set the entry and display date format for the WebOpac.

If it is not defined, the default date format of DD/MM/YY remains in effect.

Client

On each workstation, the Control Panel / Regional and Language options / Customise / Date will determine:

- Short date format (used for dates throughout the system such as due dates, transaction dates, report output dates etc.);

- Long date format (i.e. create/update date for Bibliographic records, $$DATUM for notices).

This means that the date format for output such as notices, invoices or orders to vendors is controlled by settings on the various workstations.

Workstations within an organisation which are used for producing output will have to be checked for proper and consistent set up of date formats.

Impact:

Date display and entry may be different for each region and may be different from the previous fixed setting of Day/Month/Year throughout Vubis Smart.

For example:

Default German uses the format of DD.MM.YYYY (double digit Day and Month with dot separator) with the following results:

Default English, United States uses the format of M/D/YYYY (single digit month and day) producing the following results:

Default setting for English (Australia) or French (Belgium) is in the format D/MM/YYYY (single digit day, double digit month) with the following results:

Example, Due Date field for Overdue Notices

Previously, the date of September 30, 2007 would have produced the following Output

- Due Date (DD/MM/YYYY): 30/09/07

- VIDEO J BEAUTY : 39959003542262

- Title: Beauty and the beast

For US sites whose default regional date setting is M/D/YY, this same notice will produce the following output. Modification on the label (to M/D/YY) is required.

- Due Date (DD/MM/YYYY): 9/30/07

- VIDEO J BEAUTY : 39959003542262

- Title: Beauty and the beast

Exceptions:

- Some reporting structures such as the 47x series of statistics will still request input for dates in a particular structure and will not use the flexible date format.

- AFO481 – Miscellaneous - SIP2 Settings can be used to specify the expected date format for SIP2 devices.

651.14 Cataloguing permissions

651.14.1 Introduction

To address the need for more refined restrictions (rather than at AFO level) this option was developed. It allows for User or user group permissions to be defined and controlled at record and field level. Permission settings are defined and verified per database

After choosing this option a submenu will be displayed:
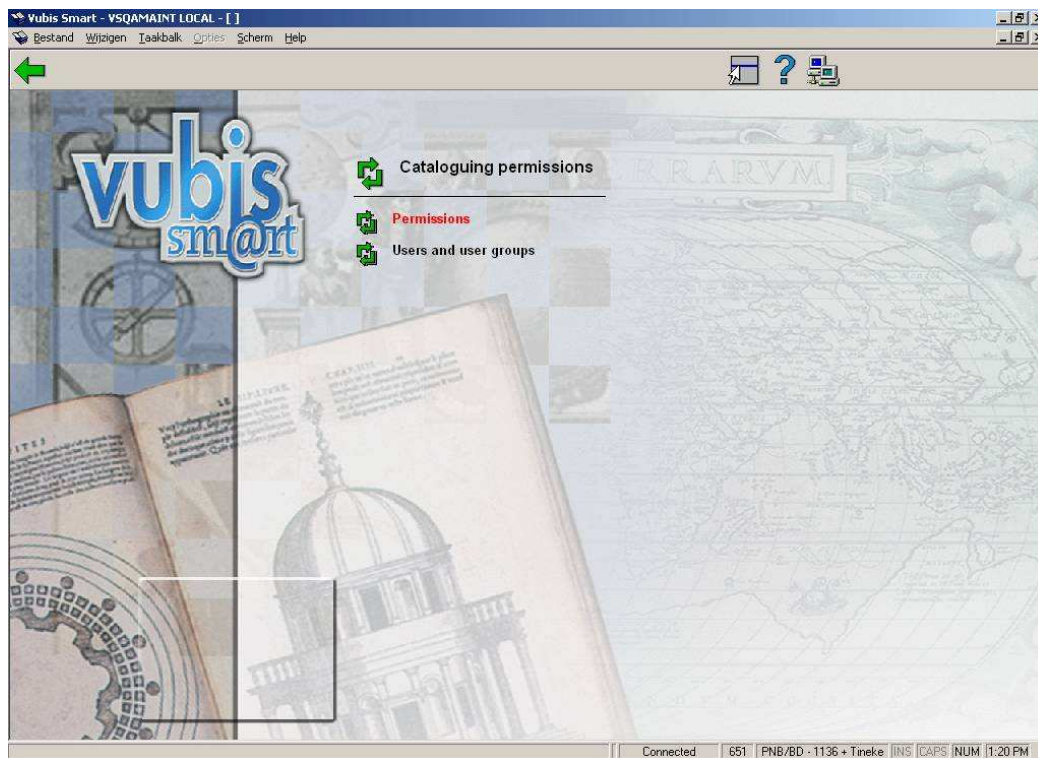
The options are described in the next sections.

651.14.1.1 Users and user groups

Permissions can be defined both for individual users and for user groups. A user group may contain any number of users, and a user can belong to multiple user groups.

A special user * **All** may be defined with the default permissions. If there are no individual user permissions or user group permissions for a specified user, then these default permissions will be used.

If no permission settings are found, everything will be allowed and access is controlled at the AFO level.

Once a permission bit is defined for one database, then all non-defined databases will be automatically set to the lowest level (read-only). Therefore it is suggested while implementing and setting up your permission profiles a full access profile is set up for All Bibliographic and all Authority databases first. This permission profile should be set to the ***All** user in order to reduce impact on staff. Continue with defining the desired profiles, using selected users as test subjects. Once all profiles are defined with the desired settings, create user groups or individual user profiles and redefine your default **ALL* user for those not explicitly defined with permissions.

651.14.1.2 Types and levels of permissions

Permissions can be set at the following levels:

- Record type and status (add, modify or remove record)

- Record technical data (modification of technical data)

- Holdings information (detailed access to holdings information)

- Order information (detailed access to order information)

- Subscription information (detailed access to subscriptions)

- Individual field (add/modify/remove field, heading creation, visibility of field)

Please note

The permissions for updating "Order" and "Shelfmark" information may become dependant of other permission settings in the future (when similar permissions are implemented for the acquisitions and circulation modules).

The record type for authorities is always *, as no record type distinction exist for authorities.

If your system uses cataloguing permissions, it is possible the message below appears in case you are not permitted to perform certain actions.

651.14.2 Setup of permissions

The database level

At the database level a select list with databases is shown, with an indication whether permissions have been defined for this database or not.

A special database * is defined (both for authorities and bibliographic databases) that can contain default permissions that are used if no specific permissions are set for a database of that application type.

After choosing this option an overview screen with all databases on the system will be displayed:

The profile or record level

Every database can have any number of permission profiles. Every profile has a name, and is linked to a record type and a list of record statuses for which the profile is valid.

The record level permission settings are a property of the profile. They determine if the record of that type may be created, modified or removed, if the technical settings of the record may be modified, and if access to the shelfmark, order and subscription functions is allowed.

Finally, every profile has a list of fields associated, with the permissions for these fields.

When you select a database an overview screen with defined profiles will be displayed:

No.	Name	Record type	Record status
1	NO DELETE	All	Complete record,Approved record
2	NO NEW RECORDS	All	All
3	No Shelfmark data	All	All
4	all	All	All
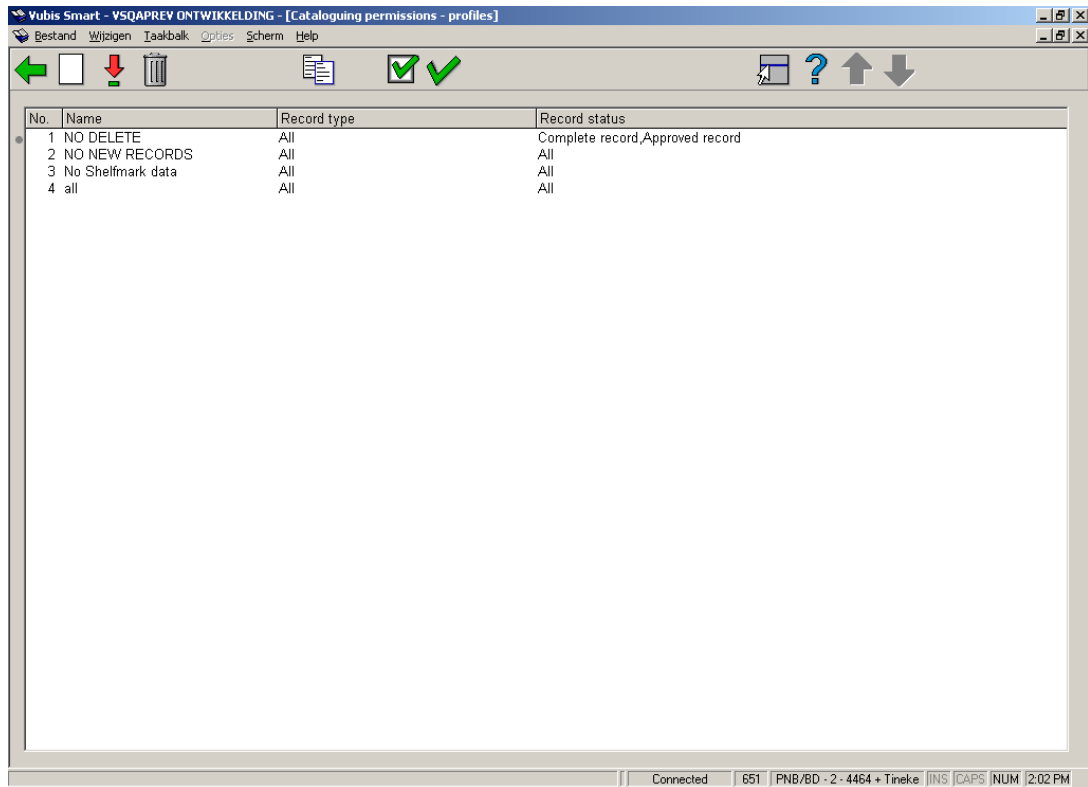
Options on the screen

New: use this option to create a new profile. See section 651.14.2.1 for more details.

Modify: select a profile and use this option to modify it. See section 651.14.2.1 for more details.

Delete: select a profile and use this option to delete it. The system prompts for confirmation.

Copy: select a profile and use this option to create a new profile based on the selected profile.

Record permissions: select a profile and use this option to view/modify the related record permissions. See section 651.14.2.2 for more details.

Field permissions: select a profile and use this option to view/modify the related field permissions. See section 651.14.2.3 for more details.

651.14.2.1 Add/modify profile

When adding or modifying a profile the following input form will be displayed:
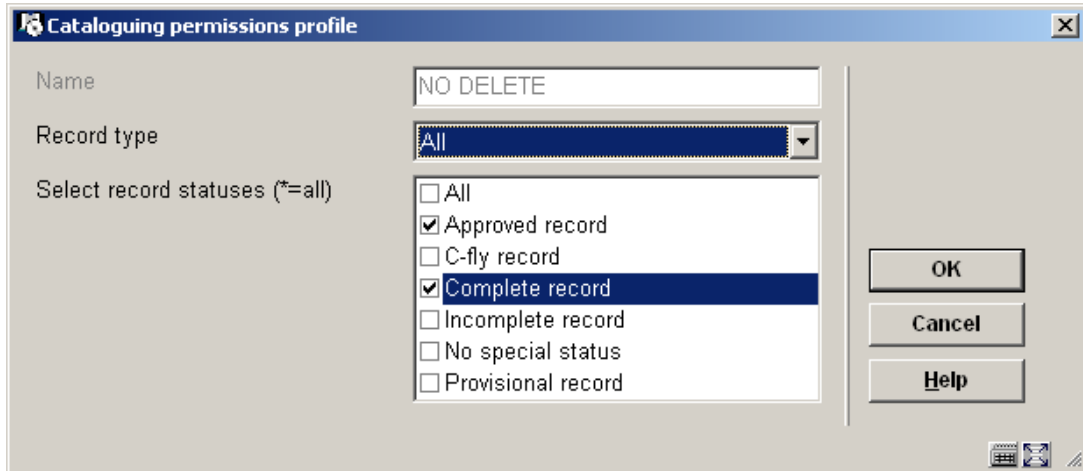
Select a **record type** and check one or more allowed **record statuses**.

651.14.2.2 Record permissions

Record permissions: select a profile and use this option to view/modify the related record permissions. An input form will be displayed:
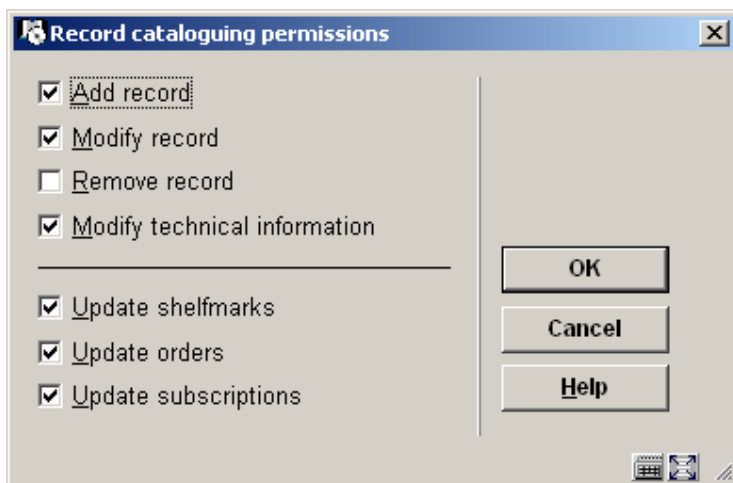
Update shelfmarks: if this is NOT checked, the user can NOT access the section Shelfmark(s) on the technical overview screen of a record.

Update orders: if this is NOT checked, the user can NOT access the section Order(s) on the technical overview screen of a record.

Update subscriptions: if this is NOT checked, the user can NOT access the section Subscription(s) on the technical overview screen of a record.

651.14.2.3 Field level permissions
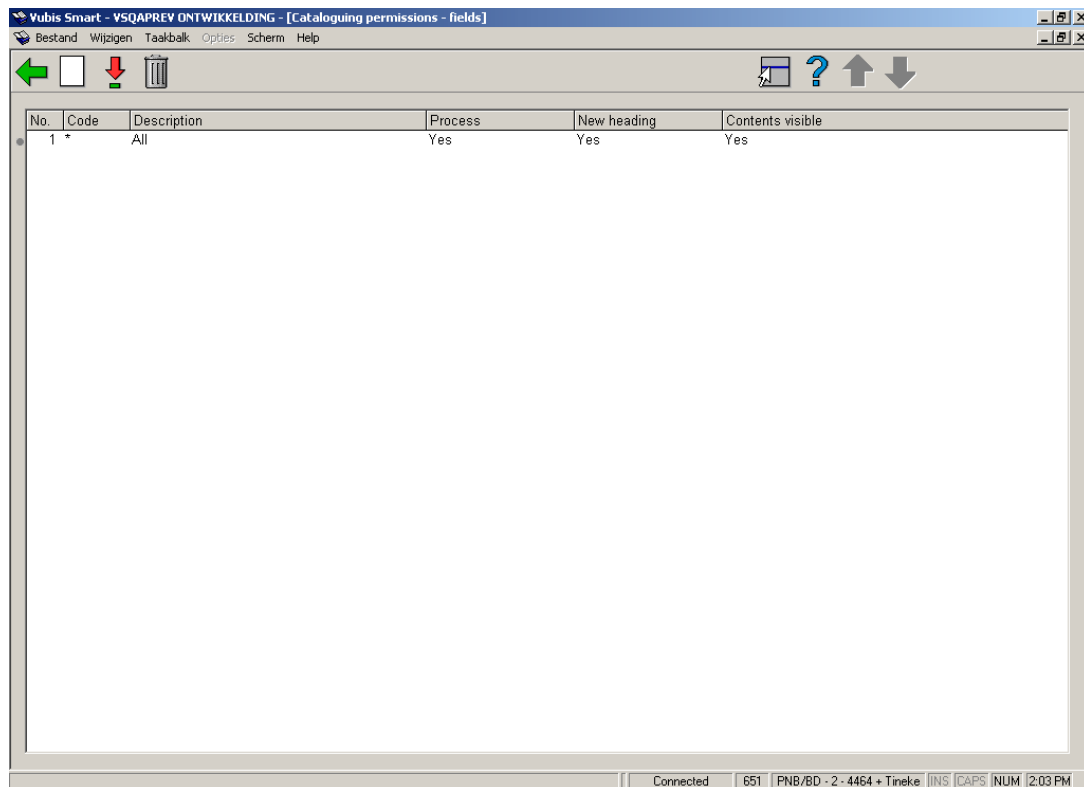
At the field level the add/modify/remove permission can be set for any field, as well as a visibility flag. A field of which the contents are not visible automatically has the add/modify/remove permission field set to "not allowed". For authority controlled fields a permission can be set for the (implicit) creation of new headings. Without this permission only existing headings can be used for the field.

A special field * can be used to set default permissions for non-defined fields.

Note

A permission profile must have fields defined. Failure to define fields in the profile will deem the profile invalid and it will not be active. Each profile should contain at least a definition for * (all fields).

Field permissions: select a profile and use this option to view/modify the related field permissions. After selecting this option an overview screen will be displayed:

Options on the screen

New: use this option to create a new permission. An input form will be displayed:

Fields on the screen

Process field – Does this profile allow the edit and processing of the field? If this checkbox is off,   data with this field cannot be modified
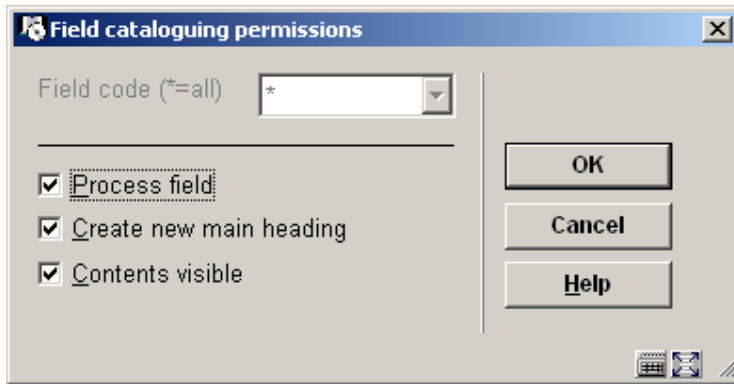
Create new main heading - For authority controlled fields, does the profile allow for the automatic creation of new authoriy entries based on the data entered into the bibliographic record.? If this checkbox is off, then only existing authority references may be selected for input. No new authority entries will be created. If this checkbox is ON, then both existing entries may be used as well as new provisional entries be created.

Contents visible - If this option is OFF, the data within the field will be masked with ********.

Note

The check box "create main heading" is not relevant for authority parameters.

Modify: select a permission and use this option to modify it. See the above input form.

Delete: select a permission and use this option to delete it. The system prompts for confirmation.

651.14.3 Users and user groups

User groups can be added, modified or removed, and permission profiles can be added to, or removed from, users or user groups. A user or user group can (and probably will) have multiple permission profiles assigned. Permissions are assigned by selecting the user (group). A user can belong to more than one user group.

When a user is defined with multiple permission profiles,   the lowest level is applied.

Note

A user listed will also inherit the rights of the default profile **(*ALL** user). Therefore if the default profile is defined in a restrictive manner, it is suggested to define and assign non-restrictive profiles to individual users. In this case, (specified users) the specified profile is applied.

After choosing this option an overview screen will be displayed:
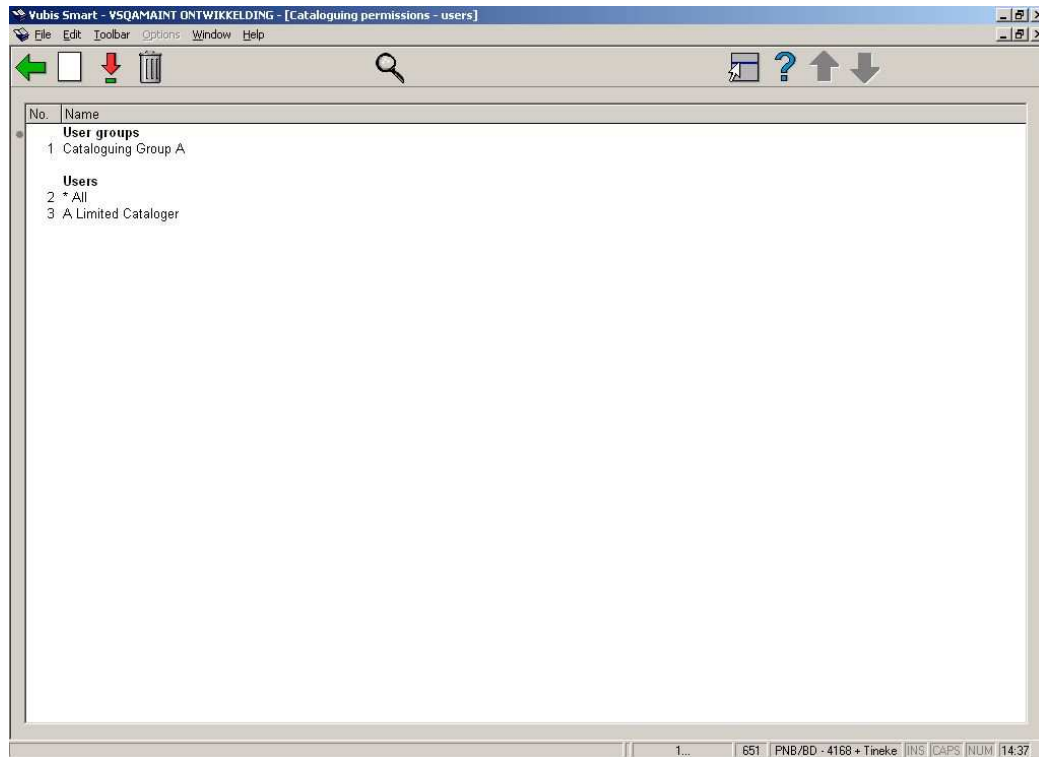
Options on the screen

New: use this option to create a new user or group. See section 651.14.3.1 for more details.
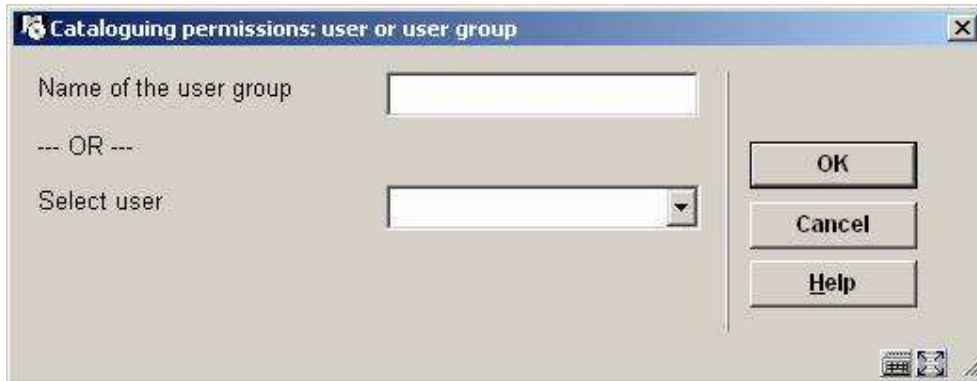
Modify: select a user or group and use this option to modify it. See section 651.14.3.1 for more details.

Delete: select a profile and use this option to delete it. The system prompts for confirmation.

View profiles per user: use this option to view the settings for a particular user. See section 651.14.3.2 for more details.

651.14.3.1 Add/modify user or group

After selecting the option to add a group or a user an input form will be displayed:
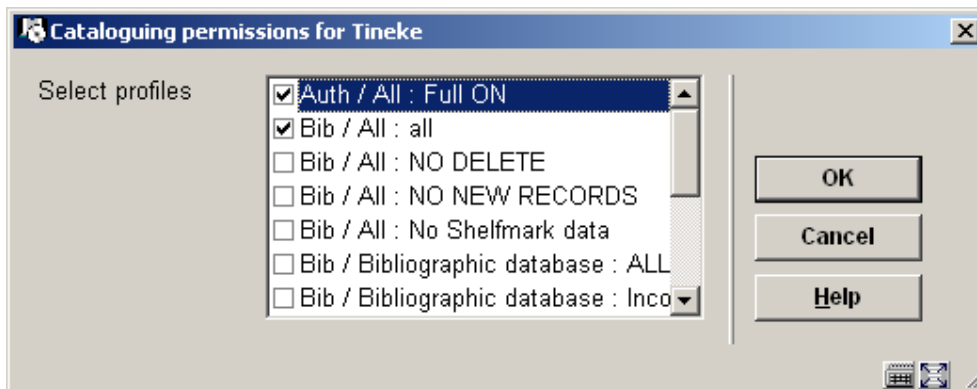
Enter the name of the new group (free text) OR select a user from the dropdown list.

After clicking **OK** the next form displayed will depend on the selection of group or user:

User - check the appropriate profile(s):

Group - check the appropriate users that will belong to this group, then check the appropriate profile(s):
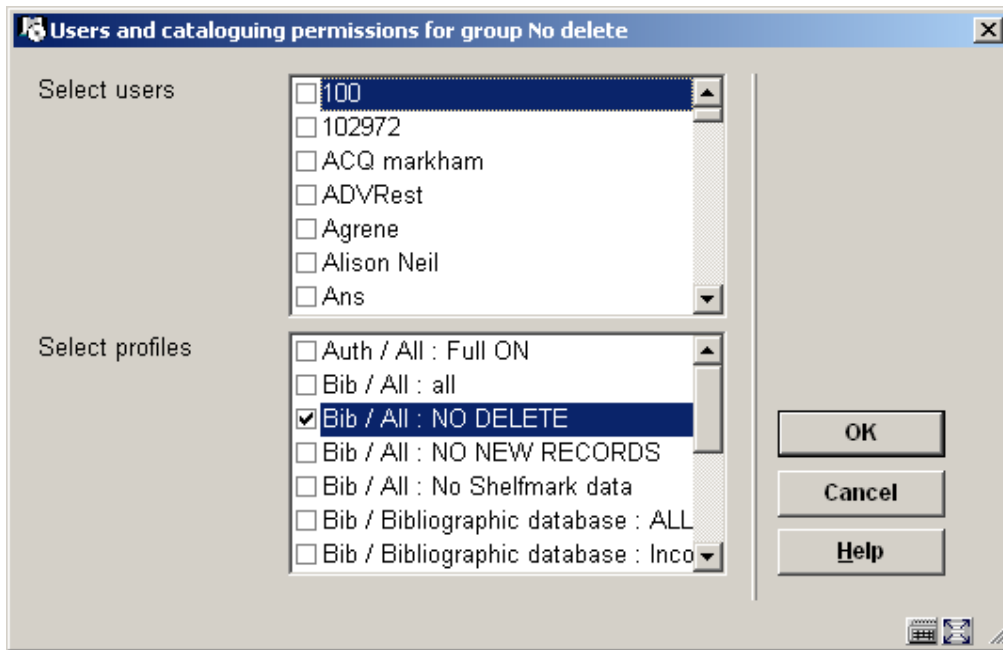
651.14.3.2 View profiles per user

After selecting the option to view the settings for a user, a selection form will be displayed:
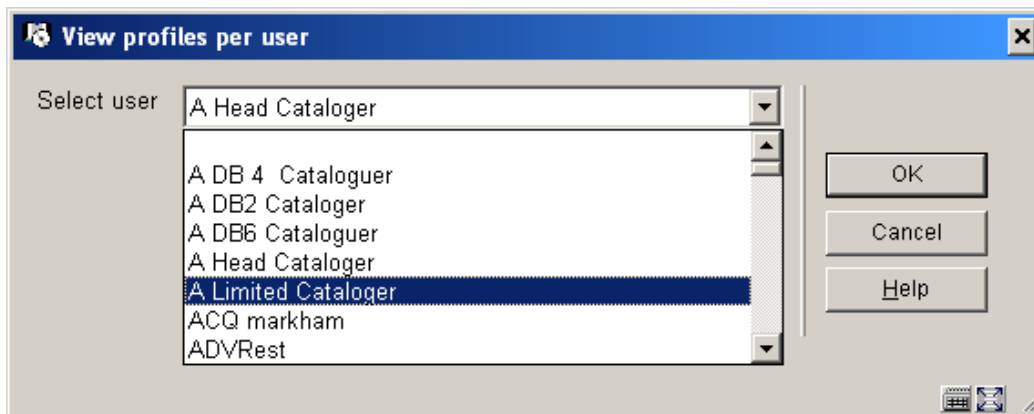
Select a user from the dropdown list (these are the users as defined in AFO 611) and click **OK**. The system returns with a list of groups / permissions applicable to this user:

```
Vubis Smart

ℹ

User A Limited Cataloger is part of the following groups:

Cataloguing Group A

The following permission profiles apply to this user:

Auth / All : Full Access all Databases

Bib / All : ALL DATABASES full Access

Bib / Vubis Smart database  : NoOrdersNoSubscription

Bib / Vubis Smart database  : Use Existing Authors only

Bib / Bibliographic database : Do not display 856 at all

Bib / Bibliographic database : Use Existing Subjects Only

                                            [    OK    ]
```

651.14.4 Verification of permissions

Below is a description of the steps the system takes to verify the permissions in the application, when users try to perform a certain action.

Retrieval of the permission profile

For the verification of the permissions, the permission profile to be used must be selected:

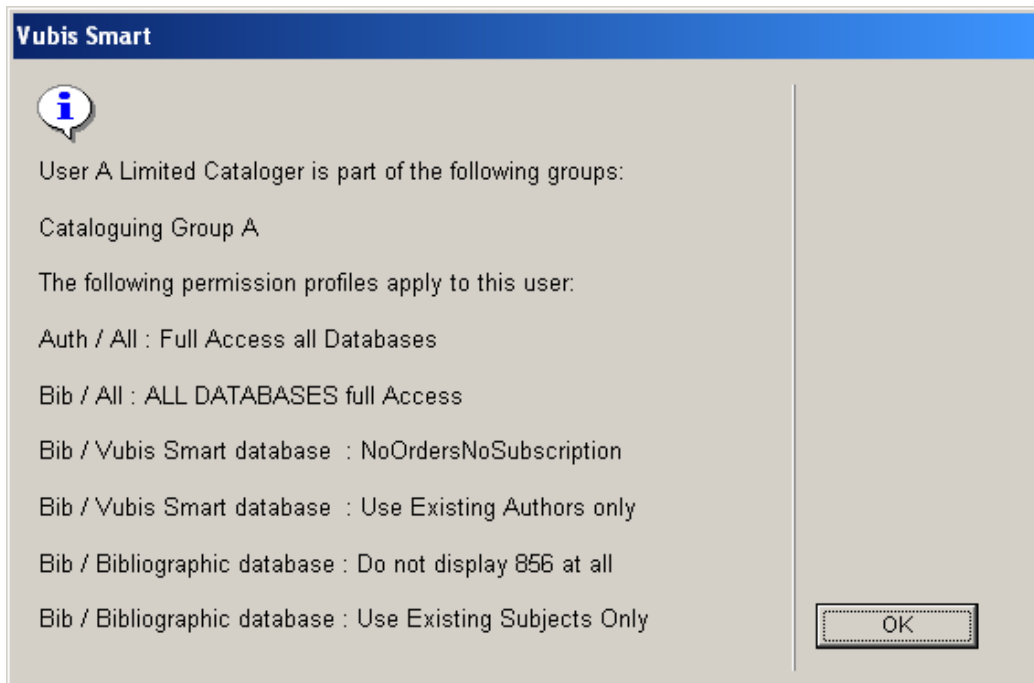The record type and record status are used to obtain a list of valid permission profiles for that type and status within the database.

The system will check all permission profiles that can be applied for the given user and record type/status, and always take the most restrictive permission. So if for instance two permission profiles can be applied in which a field may be modified according to the first one, but not to the second one, the second profile rule will apply.

Verification

The verification of the permissions for the different cataloguing actions is implemented as follows:

- Addition of a new record

The permission is checked based upon the record type

- Modification of an existing record

  The permission is checked based upon the record type and record status

- Removal of an existing record

  The permission is checked based upon the record type and record status

- Modification of the technical data of an existing record

  The permission is checked based upon the record type and record status

- Copy of an existing record

  Only allowed if addition of a record of the record type is allowed

- Merge of an existing record

  Only allowed if addition, modification and removal of this record type/status is allowed.

- Global delete (from SSP functions)

  Record deletion will not be allowed when the user has no permissions for it

Once permission has been given to add or modify a record, the permission checks are done at the field level:

- Addition of a new field

  If not allowed, the field will not be shown in the list that is obtained with Ctrl-F5, and if the field is typed in manually, it will be refused upon saving.

- Modification of an existing field

If not allowed, the field will be protected in the record editor. If the field contents should not be visible they are displayed as stars and the field will be protected.

- Removal of an existing field

    If not allowed, the field will be protected in the record editor. If the field contents should not be visible they are displayed as stars and the field will be protected.

Addition, modification and removal of relations through the relations group on the record overview screen will be verified based upon record type, record status and the field that is used to store the relation internally.

Authority controlled fields

If an authority controlled field is created or updated, and if the user has no permission for the creation of new headings, then (s)he will only be able to use *existing* authorities for the bibliographic field. Any attempt to enter a new authority, or change an existing one, will be refused in that case.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	unknown	creation	
2.0	May 2006	updates for release 2.4.1 build 16	
3.0	September 2006	updates for release 2.4.1 build 17	
4.0	December 2006	made minor modifications to C-fly chapter	
5.0	March 2007	added chapter on cataloguing permissions; updated email info; minor textual corrections; added option system date formats; added authority link search parameter and commercial barcode index parameter	
6.0	November 2007	updated info on flexible date formats; added new details feature for cataloging permissions delivered as part of 2.4.2.4 updates	