Macros in the Judaica Division of the Harvard College Library

Leveraging ALEPH Acquisitions Module Capabilities with Macro Express

Elizabeth Vernon
Judaica Technical Services Librarian
Judaica Division, Harvard College Library, Harvard University
vernon@fas.harvard.edu
Why Macros?

• Macros dramatically leverage ALEPH’s capabilities

• Macros improve:
  – Productivity
  – Ergonomics
  – Accuracy

• Macros allow “customization” of ALEPH
What Macros?

• Created using Macro Express

• Macros used for:
  – Acquisitions
  – Cataloging
  – Barcoding
Why Acquisitions Macros?

• Most Judaica Division acquisitions done via approval plans

• In old online system, ordering and payment could be done simultaneously
Why Acquisitions Macros? (cont.)

• In Aleph, ordering and payment must be done as two separate processes
  – More time-consuming
  – Order numbers must be written down and re-keyed in to pay

• Judaica Division has many different funds - Aleph system for selecting and inputting a fund is cumbersome
Not Just Macros, A New Acquisitions Solution

• Workflow Redesign

• Software
  – ALEPH
  – Macro Express
  – FileMaker Developer
Workflow Redesign

• What stayed the same:
  – “Cataloging on Receipt”

• What changed:
  – student assistants now do payment and end-processing instead of catalogers
  – all cataloging and acquisition statistics are automated
Software

- Aleph
- Macro Express
- FileMaker Developer
Demo

Judaica Division
Statistics Database

xxxxx

Set Defaults  Statistics

Input State  Pay Invoice

Find

Exit

Created by Elizabeth Venom for the Avee Studies Department, 2000 - Version 1.0.1
Input FY

2063

Input Current Year/Month

2009-05

Input Predominant Cataloging Type (Original, Modified, Copy, Provisional, Add-To, Authority)

Org

Input Predominant Cataloging Format (Book, Serial, Video, etc.)

6

Input Predominant Acquisitions Type

Purchase

Input Current Invoice Vendor

Biggs

Input Current Invoice Number

00045

Input Fund (only if all or most of the items on an invoice are being paid with one fund)

50110

Input Predominant Acquisitions Format (Material Type)

Book

Input Note
Have you completed setting defaults?
Feldberg, Yonatan.

a) Moreh halakhah be-hilkhot Shabat:
   b) ... al hilkhot shabat,
   c) [al yede Yonatan Feldberg; be-siyuro Yaroslav Feldberg; tsiyurim al yede Yonatan Gersheim]

b) [Brooklyn, N.Y.: b) Heretz ha-Shabat, c) 763, 2002]

300 a) 396 p.:
   b) ill.;
   c) 26 cm.

650 0 a) Sabbath (Jewish law)

650 0 a) Prohibited work (Jewish law)

700 1 a) Feldberg, Y. aaron.

700 1 a) Gershten, Yonathan.

752 1 a) United States
   b) New York
   d) New York
Pre-Order/Statistics Macro Begins
Yeore ha-hilkhot Shabat

... al hilkhot dash /

[al yode Yechezkel Feldberger; be-siyura Yaakov Feldberger; tosifim 'al yode Yonatan Gershtein]

Merkaz ha-Shabat,

763, 2002

Sabbath (Jewish law)

Prohibited work (Jewish law)

Feldberger, Yaakov.

Gershstein, Yonathan.

United States

New York
Pre-Order/Statistics Macro Ends
Order Macro Begins
### Order Form - M?ore halakhah be-hilkhot Shabat:

#### 1. Order Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Number 1</td>
<td>3112503-1</td>
</tr>
<tr>
<td>Order Status</td>
<td>NEW</td>
</tr>
<tr>
<td>Order Number 2</td>
<td></td>
</tr>
<tr>
<td>Order ISBN/ISSN</td>
<td></td>
</tr>
<tr>
<td>Open Date</td>
<td>27-May-2003</td>
</tr>
<tr>
<td>Order Date</td>
<td>00-00-0000</td>
</tr>
<tr>
<td>Order Date</td>
<td></td>
</tr>
<tr>
<td>Order Date</td>
<td></td>
</tr>
</tbody>
</table>

- **Material Type:**
- **Sub-library:** WID
- **Acquisition Method:**
- **Initiator ID:**
- **Initiator Name:**
- **Action:** None
- **Approver ID:**
- **Library Note:**

#### 2. Vendor

- **Order Number 3:**
- **Order Group:**
- **Status Date:** 27-May-2003

#### 3. Quantity and Price

- **Order Unit:** WID04

**Buttons:**
- OK
- Save Def.
- Refresh
- Cancel
- Help
Order Form - M?ore halakhah be-hilkhot Shabat:

1. Order Information

Order Number 1: 9112503-1  
Order Status: SV  
Order Number 2:  
Order Number 3:  
Order ISBN/ISSN:  
Order Group:  
Open Date: 27-May-2003  
Status Date: 27-May-2003  
Order Date: 00-00-0000  

Material Type: BK  
Sub-library: WID  
Acquisition Method:  

Initiator ID:  
Initiator Name:  
Action: None  
Approver ID:  
Library Note:  

2. Vendor

3. Quantity and Price

OK  
Save Def.  
Refresh  
Cancel  
Help
Order Macro Ends
What Vendor and Invoice Number do you want to pay?

Input Invoice Vendor

Input Invoice Number
What Vendor and Invoice Number do you want to pay?

Input Invoice Vendor

Input Invoice Number
What Vendor and Invoice Number do you want to pay?

Input Invoice Vendor
(name)

Input Invoice Number
(SN001)
Message

Do you want to see only those entries that have not yet been paid (for payment purposes) or all entries (for verification purposes)?

[All] [Unpaid]
<table>
<thead>
<tr>
<th>Name</th>
<th>Total Payments via Memo</th>
<th>Total Exclusions (Not Paid via Memo)</th>
<th>Invoice Total (Payments + Exclusions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bingal</td>
<td>$228.00</td>
<td>$89.18</td>
<td>$317.18</td>
</tr>
</tbody>
</table>

Table with details of transactions and amounts.
# Payment Macro Begins

<table>
<thead>
<tr>
<th>Name</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item 1</td>
<td>$123.45</td>
<td>Description 1</td>
</tr>
<tr>
<td>Item 2</td>
<td>$67.89</td>
<td>Description 2</td>
</tr>
<tr>
<td>Item 3</td>
<td>$34.56</td>
<td>Description 3</td>
</tr>
</tbody>
</table>

Total Payments: $223.50
Total Exclusions: $91.23
Invoice Total: $132.27
<table>
<thead>
<tr>
<th>Item Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item 1</td>
<td>$100.00</td>
</tr>
<tr>
<td>Item 2</td>
<td>$200.00</td>
</tr>
<tr>
<td>Item 3</td>
<td>$300.00</td>
</tr>
</tbody>
</table>

Total: $600.00
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Amount</th>
<th>Payment Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>00125050-1</td>
<td>Total Payment via Mooc</td>
<td>$228.59</td>
<td></td>
</tr>
<tr>
<td>0012703-1</td>
<td>Total Exclusions (Net Paid via Master)</td>
<td>$91.28</td>
<td></td>
</tr>
<tr>
<td>0012614-1</td>
<td>Invoice Total (Payment + Exclusions)</td>
<td>$311.77</td>
<td></td>
</tr>
</tbody>
</table>

- Other Charges
- Refund to Pay
### General Invoice & Line Items: 62515 - BIEGEL

#### Field Name | Field Data
--- | ---
Invoice Type: | REG
Invoice status: | REG
Credit/Debit: | D
Currency: | USD
Net amount: | 563.25
Shipment amount: | 0.00

#### General Invoice
- **Total Amount:**
  - 563.25

#### Items
- **Number of Line Items:** 20

<table>
<thead>
<tr>
<th>Seq</th>
<th>Order No.</th>
<th>Net Amnt.</th>
<th>Total Amnt.</th>
<th>Budget</th>
<th>Local Amnt.</th>
<th>Units in</th>
<th>Units in or</th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td>9112631-</td>
<td>-3.00</td>
<td>-3.00</td>
<td>415.37</td>
<td>-3.00</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>860.5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>60251.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>65507</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.0000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>.00000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>-2003</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>9097944-</td>
<td>-14.00</td>
<td>-14.00</td>
<td>415.37</td>
<td>-14.00</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>860.5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>62277</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Additional Buttons
- Add
- Modify
- Delete
- View Order
- Order Log
- Close
- Help
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor Code</td>
<td>BIEGEL</td>
</tr>
<tr>
<td>Estimated Price</td>
<td>12.50</td>
</tr>
<tr>
<td>Net Amount</td>
<td>12.50</td>
</tr>
<tr>
<td>Added Amount</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Amount</td>
<td>0.00</td>
</tr>
<tr>
<td>Local Amount</td>
<td>0.00</td>
</tr>
<tr>
<td>Number of Units</td>
<td>1</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
</tr>
<tr>
<td>Object Code</td>
<td>1</td>
</tr>
<tr>
<td>Invoice Number</td>
<td>62515</td>
</tr>
<tr>
<td>Order Completely Invoiced</td>
<td>✓</td>
</tr>
</tbody>
</table>

**Bibliographic Info**

Feldberger, Yehezkel.
Me'ore halakhah be-hilkhot Shabat : ... 'al hilkhot dash / ['al yede Yehezkel Feldberger ; be-siyu'a Yaakov Feldberger ; tsiyurim 'al yede Yonatan Gershtein]
[Brooklyn, N. Y. : Merkaz ha-Shabat, 763, 2002]
<table>
<thead>
<tr>
<th>Invoice</th>
<th>Name</th>
<th>Description</th>
<th>Amount</th>
<th>Time</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>101</td>
<td>Item 1</td>
<td>Detailed Description</td>
<td>100.00</td>
<td>2023</td>
<td>Paid</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>102</td>
<td>Item 2</td>
<td>Additional Notes</td>
<td>50.00</td>
<td>2023</td>
<td>Confirmed</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>103</td>
<td>Item 3</td>
<td>Main Instruction</td>
<td>150.00</td>
<td>2023</td>
<td>Paid</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>104</td>
<td>Item 4</td>
<td>Supplementary Notes</td>
<td>75.00</td>
<td>2023</td>
<td>Confirmed</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>105</td>
<td>Item 5</td>
<td>Final Notes</td>
<td>25.00</td>
<td>2023</td>
<td>Paid</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Payment Macro Ends
Compiling Statistics

- Done monthly for cataloging and acquisitions
- Cataloging
  - Count by cataloging type, broken down by format and language
- Acquisition
  - Count of titles and pieces, broken down by format and language
After producing monthly statistics reports, change statistic reporting month below to the new month.

2003-04
<table>
<thead>
<tr>
<th></th>
<th>Orig</th>
<th>Mid</th>
<th>CopyR</th>
<th>CopyO</th>
<th>CopyL</th>
<th>CopyP</th>
<th>NAO</th>
<th>NAC</th>
<th>Add-To</th>
<th>PrevA</th>
<th>PrevO</th>
<th>PrevR</th>
<th>PrevV</th>
<th>Oril</th>
<th>Arq</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>246</td>
<td>27</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>eng</td>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>helb</td>
<td>23</td>
<td>22</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>job</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>yid</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>S</td>
<td>helb</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Do you want to print?
After producing monthly statistics reports, change statistic reporting month below to the new month.

2003.04
### Julia Division Acquisitions Statistics FY2003

**Current: Leah 2003**

<table>
<thead>
<tr>
<th>Type</th>
<th>271</th>
<th>281</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>Book</td>
<td>256</td>
<td>367</td>
</tr>
<tr>
<td>Book</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Book</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>CD-ROM</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Period</td>
<td>2</td>
<td>4</td>
</tr>
</tbody>
</table>

Do you want to print?
Judaica Division
Statistics Database

xxxxx

- Set Defaults
- Statistics
- Input Stats
- Find
- Pay Invoice
- Exit

Compiled by Elizabeth Yerca for the Area Studies Department, 2003 - Version 7.1
Results

• The acquisitions processing of one book (order, payment, statistics):
  – Without macros: approximately 46-58 keystrokes and mouse-clicks, plus writing down of order number, plus manual recording of statistics
  – With macros: approximately 10-19 keystrokes and mouse-clicks
Results (cont.)

• Able to maintain and improve on pre-Aleph productivity

• In FY2003 to date (mid-July to end of May):
  – fully processed (cataloging, acquisitions, barcoding) over 15,000 titles and over 19,000 pieces (not including paper serials and photographs)

• Statistics are fully automated