Creating Aleph Workflow Scripts with e-Glue

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What is e-Glue?

- **An authoring tool**
  - **Workflow: step-by-step help**
    - Offers the ability to create training sessions that users can use at their own pace and at their own workstation
  - **Helper: context-sensitive help**
    - Allows locally customizable, context-sensitive linkage between screen elements and help topics

- **A viewer**
  - Allows staff to individually select which workflows they want assistance with
  - Supports scripted training sessions without instructor intervention (self training)
Creating Processes

- Project staff develop scripts using general Iowa workflows/terminology
- Technical Coordinator copies and edits scripts to follow generic Aleph workflows/terminology
- Process is captured and saved in Iowa Project and in Aleph500 Project.
Iowa began creating e-Glue scripts fall 2002
- Acquisitions (fall 2002)
- Cataloging (winter 2002)
- Serials (spring 2003)
- Circulation (summer/fall 2003)
Processes Completed

**Acquisitions / Administrative**
- Creating a Vendor Record – Control Data
- Creating a Vendor Address Record
- Creating a Budget (Fund) Record
- Creating an Order Record (Purchase Order)
- Acquisitions Based Receiving (Arrival) – Order Type M, O
- Creating a General Invoice/Registering a Payment
- Claiming a Monograph (Initial Claim/Subsequent Claims)
- Creating a Subscription Record in Acquisitions
Processes Completed

- **Cataloging**
  - Fixed Field Editing & Help on field
  - Creating a Basic HOLdings Record
  - Creating an ITM Link
  - Creating and Saving a Template

- **Serials (in process)**
  - Creating a Subscription Record in Serials
  - Creating a Subscription Record in Acquisitions
  - Creating Publication Schedules
  - Arrival in Serials Client
  - Claiming in the Serials Client
Processes Completed

- Cross-Module
  - How to search for a record using SCAN
  - How to search for a record using FIND
  - Creating an Item Record
**e-Glue Terminology**

- **Project:** a collection of workflow processes.

- **Process:** series of consecutive online steps and actions required to bring about a desired result

- **Topic:** a description of each step or action

- **Element:** any component part of an online display
Putting Them Together

- Topics + Elements = Process
- Process + Process = Project
What is a topic?

- A single step or action required to complete a discrete task or workflow

- Types of topics
  - Help “balloons”
  - External files
  - Web pages
  - E-Mail
Steps to Create a Process

- Create topics in e-Glue
- Capture Elements in Aleph
- Link Topics to Captured Elements
e-Glue Builder

- Topic Explorer
- Context Navigator
- Process Navigator
- Control Panel
- Toolbars
- Change screens
- Notes
Builder
Topic Explorer
The Elements Navigator is used to display the captured elements.

The Elements Navigator has two modes:
- Context Navigator and
- Process Navigator
Context Navigator
Process Navigator
Control Panel
Toolbars

- Project Toolbar
- Process or Context Navigator Toolbar
- Topic Explorer Toolbar
Change Screen

- Change screen is a feature of the Process Navigator. It’s purpose is to direct the user to the screen he must go to in order to proceed with the process.

- Change screen will appear whenever the user has a different screen open than the screen to which the next topic is directed.

- Change screen will not disappear until the user is at the correct screen.
Change Screen

- There must be a Change Screen balloon at the top of every process directing the user to correct screen. The Captured Process itself starts at the first step on the correct screen NOT at a description of how to get to the correct screen.
Notes

- Note is a feature of the Process Navigator.
- It is a balloon Topic that appears at the center of the screen but is not attached to a specific element.
- The Note’s purpose is to provide a space for random help in the middle of a Process.
Notes

- It will appear where ever it is placed in the Process, regardless of the users actions and will disappear when clicked on.
- The final step in every process is a NOTE that says “End of Process”