How to Open a Library

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# Table of Contents

OPENING A NEW LIBRARY ........................................................................................................ 5

LIBRARY NAMES .................................................................................................................. 6

1. Create a directory for each library .................................................................................. 6

2. Copy files from standard library package to the directories you have created .... 6

3. prof_library File.......................................................................................................... 6
   3.1 Correct the library code in the prof_library file.................................................... 6
   3.2 Adjust the “cycle size” parameters ........................................................................ 7

4. Assign size and extension size of oracle tables, and correct table synonyms
   where necessary................................................................................................................. 7

5. Add the library to the startup file (aleph_start_505.private) ....................................... 7

6. Activate the aleph_start definitions ............................................................................. 8

7. Clean up the new library’s directories......................................................................... 8

BASIC ORACLE INITIALIZATION .................................................................................... 8

1. Create an Oracle user...................................................................................................... 8

2. Open Oracle tables ....................................................................................................... 8

3. Create library synonyms.............................................................................................. 9

4. Create/Recreate all library triggers (ADM libraries only) ........................................... 9

5. Create/Recreate all library sequences.......................................................................... 9

6. Create initial library parameters (values for param - UTIL G/3) ................................. 9

DEFINING THE LIBRARY ON THE SERVER .................................................................. 10

1. Add library to web library lists...................................................................................... 10

2. Change default language and library (optional).......................................................... 10

3. Add library to tab_base (UTIL Y/3)........................................................................... 10

4. Add library to path_convert (UTIL Y/6)................................................................... 10

5. Add library to library_relations (UTIL Y/7).............................................................. 11
6. Update table of sub-libraries: tab_sub_library (UTIL Y/4) .......................... 12
7. Update circulation/cash authorizations: tab_attr_sub_library (UTIL Y/13) .... 12
8. Password authorizations .............................................................................. 12

TAILORING THE LIBRARY ............................................................................. 13

UTIL G THROUGH M TABLE CORRECTIONS: .................................................. 13

UTIL G/5/10 ..................................................................................................... 13
UTIL G/5/14 ..................................................................................................... 13
UTIL/G/5/15 ..................................................................................................... 13
UTIL/G/5/16 ..................................................................................................... 13
UTIL/G/5/17 ..................................................................................................... 13
UTIL/G/5/18 ..................................................................................................... 13
UTIL/G/4/25 ..................................................................................................... 14
UTIL/G/5/30 ..................................................................................................... 14
UTIL/G/5/31 ..................................................................................................... 14
UTIL/G/5/32 ..................................................................................................... 14
UTIL/G/5/34 ..................................................................................................... 14
UTIL/G/4/35 ..................................................................................................... 14
UTIL/G/4/36 ..................................................................................................... 14
UTIL/G/4/40 ..................................................................................................... 14
UTIL I/1, 2, 3 ................................................................................................... 14
UTIL I/7 .......................................................................................................... 15
UTIL I/8 .......................................................................................................... 15
UTIL J/6 .......................................................................................................... 15
UTIL J/5 .......................................................................................................... 15
UTIL L/2 .......................................................................................................... 15
UTIL L/3/a ...................................................................................................... 15
1. Install the client on your PC ................................................................. 16
2. Create passwords .................................................................................... 16

LOADING BIBLIOGRAPHIC DATA ................................................................. 17

BUILDING THE DATABASE ........................................................................... 17

LOADING ADMINISTRATIVE DATA ............................................................... 17

PATRON IDENTIFICATION IN THE WEB OPAC ......................................... 17

FILE NAMES IN $ALEPHE_ROOT/WWW_B_LNG ....................................... 18

PATRONS SIGN IN TO THE WEB OPAC ..................................................... 18
OPENING A NEW LIBRARY

An ALEPH500 application typically has three "libraries", <library code>01 (for bibliographic records), <library code>50 (for Items, Acquisitions, Circulation, etc.) and <library code>10 (for Authority records). Additional library types are <library code>20 for ILL, <library code>30 for Course Reading database and <library code>60 for MARC21 Holdings records. In this document “FTS…” is used for <library code>.

ALEPH500 has three standard types of bibliographic applications: USMARC, UNIMARC and MAB. The following conventions are used for library names:

- BIBliographic records library is USM01; UNI01; MAB01
- AUTHority records library is USM10; UNI10; MAB10/11/12
- ADMinistrative records library (Items, Circulation, Acquisitions, Serials) is USM50; UNI50; MAB50
- HOLDings records library is USM60; UNI60; MAB60
- ILL library (bibliographic records of the requests) is USM20; UNI20; MAB20
- Course Reading library for course reserve materials is USM30; UNI30 or MAB30

The local application should use the same conventions (FTS01, FTS10, FTS50, etc.) when opening a new library, using as the basis the USM, UNI or MAB package (according to the type of library being opened). The following instructions are general and may differ slightly, depending on the type of library.

In a “complete” library setup you should have at least “01” for bibliographic records and “50” for administrative records. You may also have “10” for authority records, “60” for holdings records, “20” for ILL bibliographic records and “30” for Course Reading database.

Note:
The standard ALEPH UNI and MAB libraries do not include Web directories or files. The alephe/path_convert file is used to direct these applications to USM Web directories and files.

***** Repeat the following procedures for each library you are adding *****
LIBRARY NAMES

1. Create a directory for each library
The person in charge of the server should inform you where [on which disk] the libraries should be located, after which you must create a root directory for each library, using `mkdir ..../u50_5/fts01`. The library should NEVER be under a50_5. The convention is to have it parallel to a50_5.

e.g.,
>>> mkdir /aleph/u50_5/fts01
>>> mkdir /aleph/u50_5/fts50
(mkdir = make directory; /aleph = disk; /u50_5 = directory of aleph users on the disk; fts01 = library code)

2. Copy files from standard library package to the directories you have created
This step is repeated for each library. In each case, in the copy (cp) command, use usm01/uni01, usm10/uni10, usm50, depending on the library being opened.

dlib usm01
dr
cp -pR * /aleph/u50_5/fts01
This will copy the data_root from the library that is the source for your new settings. Be sure to enter the right type of library. If you are creating an administrative library, do this procedure in USM50, for example.

3. prof_library File

3.1 Correct the library code in the prof_library file
Under the library’s root directory (e.g. cd /aleph/u50_5/fts01)
>>> vi prof_library
This can be done using the following line command:

:1,$s/usm01/fts01/g

**Note:**
The library code in the following lines MUST be in upper case:

```plaintext
setenv active_library FTS01
set_symbol ACTIVE_LIBRARY FTS01
```

After making the substitution, correct the two instances mentioned above to upper case, write and quit.
3.2 Adjust the “cycle size” parameters

```
setenv acc_loop_length nnnnn
setenv word_loop_length nnnnn
setenv index_loop_length nnnnn
setenv z0102_loop_length nnnnn
```

(The "acc" is p_manage_02, "word" is p_manage_01, "index" is p_manage_05, and "z0102" is p_manage_32.)

Generally, the loop_length should be about 3% of the number of doc records in the library:

- 5000 for < 100,000 doc records
- 20000 for < 500,000 doc records
- 50000 for < 2,000,000 doc records
- 100000 for < 4,000,000 doc records
- 200000 for > 4,000,000 doc records

4. Assign size and extension size of oracle tables, and correct table synonyms where necessary.

Under the library’s root directory (e.g. /aleph/u50_5/fts01)

```bash
>>> vi file_list
```

Use sample file_lists in the ../a50_5/usm01 directory as models:

- file_list.02M (200,000 doc records)
- file_list.05M (500,000 doc records)
- file_list.2M (2 million doc records)
- file_list.4M (4 million doc records)

See the ALEPH500 System Administration Guide (14.2), section 4.4.1, for more details on the file_list.

**Note:**
In a BIB library (including ILL), you must correct the line below, substituting xxx with the code of the ADM library.

```
LS z303 xxx50
```

5. Add the library to the startup file (aleph_start_505.private)

An ALEPH installation contains two “aleph_start” files: aleph/aleph_start_505 and aleph/aleph_start_505.private. The “private” file is empty and is intended to serve as the site’s aleph_start file. It is activated by the aleph_start_505 file, which also includes the standard libraries that are included in the ALEPH installation. Use the lines in aleph_start_505 as templates for the aleph_start_505.private file.

```bash
>>> vi $alephe_root/aleph_start_505.private
```
List the libraries that are particular to your installation.
<lib-code>_dev
"ALEPH_LIBS <lib>"

Example:
setenv fts01_dev /aleph/u5${VERSION_NUMBER}_5
setenv fts50_dev /aleph/u5${VERSION_NUMBER}_5
setenv fts10_dev /aleph/u5${VERSION_NUMBER}_5
...
setenv ALEPH_LIBS "$DEMO_LIBS fts01 fts50 fts10"
setenv ALEPH_LIBS "$ALEPH_LIBS fts60 fts20"

Note:
The ALEPH_LIBS line can be repeated as many times as necessary in order to list all libraries.

6. Activate the aleph_start definitions

>>> source $alephe_root/aleph_start_505
[this also activates aleph_start_505.private]

7. Clean up the new library’s directories

After you have finished setting up the above steps, check that the library’s scratch, files and print directories are empty. If they are not, use the remove command (>>>rm *) to remove files.

To do this, connect to the library you have created; for example, ‘dlib fts01’, and then, to remove the unnecessary files, enter each of the directories in the following way:

dlib fts01
ds
rm *
dfl
rm *
dp
rm *

BASIC ORACLE INITIALIZATION

1. Create an Oracle user

>>> dlib fts01
>>> ap
>>> create_ora_user fts01

2. Open Oracle tables

>>>dlib fts01
Perform UTIL A/17/1/ALL to open all files, as listed in "file_list"
Reply YES to first prompt
Reply NO to second prompt
3. Create library synonyms
Perform UTIL A/17/5

4. Create/Recreate all library triggers (ADM libraries only)
Perform UTIL A/17/6

5. Create/Recreate all library sequences
Perform UTIL A/17/9

6. Create initial library parameters (values for param - UTIL G/3)
Perform UTIL G/3
Confirm Y
DEFINING THE LIBRARY ON THE SERVER

Add library to web library lists

```bash
>>> cd $alephe_root
>>> cd www_a_eng
>>> vi base-list
add the base code to the list
```

**Internal EXL note:** on Ex Libris machines be sure to put the customer codes in alphabetical order BELOW the EXL libraries.

2. Change default language and library (optional)

```bash
>>> cd $alephe_root
>>> vi www_server_defaults
setenv www_con_lng                  ENG
```

3. Add library to tab_base (UTIL Y/3)

4. Add library to path_convert (UTIL Y/6)

In this table you can define a non-standard path for aleph tables. For example, you can set USM01's forms to be used instead of your own forms:

```
$rug50_dev/fts50/form_eng        $usm01_dev/usm01/form_eng
```

Or you can define all forms in your own “01” environment and not separately for your “01” and “50”:

```
$rug50_dev/fts50/form_eng        $rug01_dev/fts01/form_eng
```

**Note:**
Some of the usm “10”, “20”, “50” and “60” use “usm01”. Because the tables you need will therefore not be present in your own 10, 50, etc., in order for the stem to work, you will have to set up these equivalencies for your own libraries as well.

Remove the directories/files that you have included in the path_convert table. For example, if you use $usm01_dev/usm01/www_b_eng, etc. for your WWW batch interface (this is recommended), you should not have a fts01/www_b_eng directory.

**The following examples show how to do this:**

```bash
>>> dlib fts01
>>> dr
>>> rm -r www_b_eng
>>> rmdir www_b_eng
```
This would remove the entire www_b_eng directory. If you are entering several files to path_convert and not the entire directory, remove them one by one.

5. Add library to library_relations (UTIL Y/7)
Definition of library relations
Add the library to the library_relation table, using the following as an example:

<table>
<thead>
<tr>
<th>ADM</th>
<th>USM01</th>
<th>USM50</th>
<th>USM51</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOL</td>
<td>USM01</td>
<td>USM60</td>
<td></td>
</tr>
<tr>
<td>HOL</td>
<td>USM50</td>
<td>USM60</td>
<td></td>
</tr>
<tr>
<td>ADM</td>
<td>USM20</td>
<td>USM50</td>
<td>USM51</td>
</tr>
<tr>
<td>BIB</td>
<td>USM50</td>
<td>USM01</td>
<td>USM20</td>
</tr>
<tr>
<td>BIB</td>
<td>USM51</td>
<td>USM01</td>
<td>USM20</td>
</tr>
<tr>
<td>BIB</td>
<td>USM60</td>
<td>USM01</td>
<td></td>
</tr>
<tr>
<td>ILL</td>
<td>USM50</td>
<td>USM20</td>
<td></td>
</tr>
</tbody>
</table>

This table defines the relationship of the BIB, HOL and ADM records, stating which BIB records can be related to a specific ADM library, and vice-versa.

“ADM” defines which ADM libraries are related to a BIB library.
(The BIB library is in the second column, and the related ADM libraries are listed in the third and following columns.)

“BIB” defines which BIB libraries are related to an ADM library.
(The ADM library is in the second column, and the related BIB libraries are listed in the third and following columns.)

“HOL” defines which HOL libraries are related to a BIB library.
(The BIB library is in the second column, and the related HOL libraries are listed in the third and following columns.)

“HOL” also defines which BIB library is related to an ADM library.
Actually, there is no direct link from ADM to HOL; the link is through the BIB record. In this case, the ADM library is defined in the second column, and the HOL library is defined in the third column. There can be only one HOL library per ADM library.

“ILL” defines which ILL libraries are used for storing bibliographic data for an ADM library.
(The ADM library is in the second column, and the related ILL libraries are listed in the third and following columns.)

“SET” defines the library in which the Z05 set records (created in WEB OPAC) are retained.
Each search library must be defined. One library can be used as the set library for many libraries, by repeating libraries on the same line, with one of the BIB libraries in column two, and the remaining libraries from column three on (up to 10).
In the above example, the USM library has two administrative libraries (USM50 and USM51), 1 holdings library (USM60), and one ILL library (USM20).

For a typical new library that has one Administrative library, an ILL (20) library, and a Course Reading (30) library, the setup would be the following:

ADM fts01 fts50
BIB fts50 fts01 fts20 fts30
HOL fts01 fts60
ILL fts50 fts20
SET fts01 fts01 fts20 fts30

Note:
The library_relation table is used to create the /pc_tab/catalog/hol_libs.dat file in the BIB library application(s). The table is created/updated using UTIL M/7, and is required for functionally linking the BIB and HOL libraries in the GUI modules.

An HOL-ADM link must be defined for the libraries using US libraries, using special USMARC holdings setup:

For example:

HOL USM50 USM60

This means that USM50 items will be linked to USM60 holding records through Z30-HOL-DOC-NUMBER.

6. Update table of sub-libraries: tab_sub_library (UTIL Y/4)
This is relevant for ADM libraries only.

7. Update circulation/cash authorizations:
tab_attr_sub_library (UTIL Y/13)
This is relevant for ADM libraries only.

8. Password authorizations
Using the ADMIN GUI client, add the libraries to USER “TAMI” in USM50, assigning “All functions, All sub-functions”. You will want to set up real users later.
TAILORING THE LIBRARY

The items in the following section of this document relate to tailoring ALEPH for a particular library. They are not part of the basic setup, and the library will function without performing them, except for UTIL L/3 (which sets the base and search codes for the OPAC GUI client).

UTIL G through M table corrections:

UTIL G/5/10
Switch settings for Circulation and Acquisition modules. Check whether you want to change certain switches.

UTIL G/5/14
Item reshelving time (ADM library only)
This table contains the time (per sub-library and collection) which is needed to put an item back into the closed stack after return. Fill in the names of your sub-libraries and the correct time durations.

UTIL/G/5/15
Item statuses (ADM library only)
Fill in the item statuses and the parameters per sub-library or per sub-library group which is defined in $alephe_tab/tab_sub_library (UTIL Y/4)

UTIL/G/5/16
Due dates and fine rates (ADM library only)
Fill in the due dates per sub-library or per sub-library group which are defined in Salephe_tab/tab_sub_library (UTIL Y/4)

UTIL/G/5/17
Library hours (ADM library only)
Fill in the daily open hours per sub-library. A library does not have to have this table. If it does, fines will be calculated based on the hours the library is open and not on a 24-hour day.

UTIL/G/5/18
Cash control (ADM library only)
Add the fines of your library. The table defines the functions for which users will be charged a fee.
UTIL/G/4/25
Item material type (ADM library only)
This table defines the list of possible values for the item material type. “ISSUE” has special function and must not be changed.

UTIL/G/5/30
Borrower registration renewal (ADM library only)
This table defines the periods for renewal of the borrower record (and associated privileges).

UTIL/G/5/31
Borrower statuses (ADM library only)
This table defines various defaults for borrower statuses.

UTIL/G/5/32
Overdue letter intervals (ADM library only)
This table defines overdue letter intervals for borrower/item statuses.

UTIL/G/5/34
Lost material costs (ADM library only)
This is an optional table that computes the charges to be added to the borrower’s cash record in case an item is lost. The charges are defined for each item-borrower combination.

UTIL/G/4/35
Location numbers and other information for EDI orders(ADM library only)
You need this table only if you want to use EDI.

UTIL/G/4/36
Acquisition item creation information (ADM library only)
This table has defaults for automatic creation of Monograph acquisition items. The table includes the sub-library level.

UTIL/G/4/40
Collection codes and names (ADM library only)
This table defines the expansion of the collection code as entered in the item collection field to the expanded form to be displayed in OPAC.

UTIL I/1, 2, 3
Formatting for document display (fields, paragraphs and document)
For standard applications, no update is required.
This is relevant for “01”, “10” and “20”, not for “50” and “60”. Remove/change/add lines to suit the application.

**UTIL I/7**

**Short record display**
For standard applications, no update is required.
This is relevant for “01”, “10” and “20”, not for “50” and “60”. Remove/change/add lines to suit the application.

**UTIL I/8**

**Full record display, with links**
For standard applications, no update is required.
This is relevant for “01”, “10” and “20”; not for “50” and “60”. Remove/change/add lines to suit the application.

**UTIL J/6**

If this is a first-time installation, update the server IP address and domain in the **www_server_defaults file**.
This is a node file, not related to a specific library.
Therefore, it suffices to correct this once for all libraries.

**UTIL J/5**

Update the **/alephe/pc_server_defaults file**.

**UTIL L/2**

**GUI field values (pc_tab_exp_field.[lng])**
This is relevant for ADM libraries only. Correct the library and the sub-libraries in the lines:

- ILL-PICKUP-LIBRARY
- ILL-LIB
- HOME-LIB

**UTIL L/3/a**

**GUI OPAC search codes, and print and display formats**
This is relevant for “01”, “10” and “20”, not for “50” and “60”. Substitute the base code and remove/change/add lines to suit the application.

The substitute command is:

```
1,$s/usm01/xxx01/g
```
UTIL L/4/b

Acquisitions index (tab_acq_index)
This is relevant for ADM libraries only, and only if you want to add another index.

UTIL L/4/c

Order update control (tab_order_aut)
Add the passwords which are allowed to update special orders if you want to use the “order number 3” in the Acquisitions module.

UTIL M/3

Cataloging module - link from field to headings lists
This is relevant for the BIBliographic libraries (“01”) not for “10”, “50” and “60”. Correct USM01 to <library code>, and make other adjustments as necessary.

UTIL M/7

Perform UTIL M/7 to create a new cataloging package (/pc_tab/catalog/pc_cat.pck) and relations file (/pc_tab/catalog/hol_libs.dat).

UTIL H

Use this UTILity to update and check tables.

INSTALLATION OF GUI CLIENT

1. Install the client on your PC

The client is located in /aleph/a50.5/aleph/pc_exe.nn/win95 (or win3.11). FTP the gui500.exe file, in binary mode, to your temp directory to install the client.
To install the client, double-click on gui500.exe, and then on setup.

Add the library/ies to the PC client tables:
   alephcom\library.ini
   sear\tab\sear.ini (use the menu options: database)
   tab\per_lib tables in each of the PC client modules

KILL and ACTIVATE all pc_servers and www_servers
Use UTIL W to perform killing and activating.

2. Create passwords

When ALEPH is installed, the password library is set in /alephe/aleph_start_505 to USM50. When the site is ready to set up "real" passwords, this should be changed to your own ADM library, and you should set up the passwords in this library.
Bring up the ADMIN GUI and connect to your ADM library. Click on the PASSWORDS icon in order to create passwords. ALEPH ALEPH should work as the ADMIN password.

Initially, create one password for all libraries, assigning “All functions, All sub-functions”. Repeat the procedure for each library, and assign the library code as the sub-library.

LOADING BIBLIOGRAPHIC DATA

The bibliographic data must be in ALEPH sequential format. There are WEB UTILities for converting MARC format to ALEPH sequential format and for converting special characters from one value to another.

Use p_manage_18 to load bibliographic data. Before doing this, make sure that the library’s /tab tab_expand table has expand_doc_bib_acc and expand_doc_bib_aut deactivated. These “expand” functions depend on the presence of Z01 (headings) linked to AUT (authority) records, a situation which cannot exist the first time that data is loaded.

If you are not doing a UID check for duplicate detection, run the procedure in “document_only” mode (i.e., no index updating).

Run the procedure in “single_user” mode.

Add records as “NEW”, if system numbers do not have to be retained.

BUILDING THE DATABASE

After loading the bibliographic data, build indexes, use the WWW Services interface (accessed from http://[computer]:[port]/S), “Update OPAC Indexes”:
- Headings Index (b_manage_02)
- Direct Index (b_manage_05)
- Word Index (b_manage_01)
- Alphabetize Long Headings (b_manage_17)

LOADING ADMINISTRATIVE DATA

The preparation and loading of the administrative data is site-specific.

Patron Identification in the WEB OPAC

In order for the patron to be able to sign in to the WEB OPAC, the following line must be present in $alephe_tab/path_convert:

```
$usm01_dev/usm01/tab/tab_bor_id     $usm50_dev/usm50/tab/tab_bor_id
```
With this path the system identifies the patron when he signs in to a bibliographic library. The relation to the table makes it possible to know with what type of ID he signed in and what is the correct verification field to be used with this ID. When the line is not present the server will crash.

**File names in $alephe_root/www_b_lng**

In $alephe_root/www_b_lng there are several files that have the library’s name as an extension within their own name. At the top of each one of these files, the following line appears:

```xml
<!-- filename: b-base-00-usm50 -->
```

Be sure to change the library code to that of the library you have just created. Without this change, the system will not relate to the changed file and the data in it will not be taken into consideration.

**For example:**

```xml
<!-- filename: b-sub-library-radio-usm50 -->
```

This file lists the sub-library codes used under USM50. The change in the codes within the file is not enough and the top line must be changed as well. Otherwise, your new sub-libraries will not appear as options in the various WEB pages.

**Patrons sign in to the WEB OPAC**

If the new library is a bibliographic library (for example USM01) on which patrons are supposed to search the database, for the patrons to be able to sign in to the WEB OPAC, the following steps should be covered:

- Under the library’s data_root/file_list the following lines must be present:

  ```
  LS  z303              usm50
  LS  z308              usm50
  ```

  The link should refer to the matching ADM library. For example, if the new library is UNI01, the link should refer to UNI50.

- In $alephe_tab/path_convert in the bibliographic library section, the following line should appear:

  ```
  $usm01_dev/usm01/tab/tab_bor_id   $usm50_dev/usm50/tab/tab_bor_id
  ```

  The link should refer to the matching ADM library. For example, if the new library is UNI01, the link should refer to UNI50.

- Run UTIL A 17/5 to create or recreate all library synonyms.