ALEPH VERSION 19.01

Upgrade Information Session Notes

Cataloging / Holdings / Items / Indexing

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OVERVIEW

This is an overview of changes in ver. 19 for Cataloging, Holdings, Items, and Indexing. It is not an exhaustive list—it highlights some of the more important changes in ver. 19. For more information, please see the Aleph Documentation area of the PALS web site at http://www.mnpals.org/sections/Aleph_Docs.html


1. CATALOGING

1.1 Field Validity Check

This checks if the field contains a valid ISSN number or a valid ISBN number. ISSN numbers may be missing the hyphen and ISBN numbers may be 10 or 13 digit numbers.

a. Edit Actions Menu/Check Record
b. Edit Actions Menu/Check Field
c. Save Record to Server
1.2 Edit Menu Split Up

The Cataloging module’s Edit menu has been split into two menus:

a. Edit Actions – Listing actions such as Open Form, Browse URL or Check Record.

b. Edit Actions can also be opened from the record Editor, use ‘Right-Click’ mouse option.

c. Edit Text – Listing text options, such as New Field, Copy and Paste.

d. Edit Text can also be opened from the record Editor, use Shift + ‘Right-click’ mouse option.
1.3 **New Table – tab_loader replaces tab_z30.** It is used for setting default values on bib records that come through the online OCLC server, MARCIVE loader, Generic Vendor Record loaders.

a. XXX50/tab/tab_loader – col. 1 = 049 holding code of incoming bib record; col. 2 = OWN code. Tab_z30 information migrated to this table. **(NOTE: All libraries should check that their correct 049 codes migrated across correctly).**
Other Tables used for the automatic creation of Item and Holding records
   a. XXX50/tab/tab_loader_def = defines values for items, orders & budget transaction records that are system created.
   b. XXX50/tab/tab_mapping is still used to configure information for the automatic creation of HOL records.

1.4 New Retrieve Catalog Record Services

   a. Retrieve catalog records > Cross Files (ret-10). This service crosses two input files using Boolean operators. The input files should be files that resulted from one of the retrieve services. If the files are created via another method such as online GUI search, they must be sorted before running the service. The service produces a new output file that includes the results of the Boolean operation.

   ![Cross Files (ret-10) - SYS01](image)
1.5 New Catalog Maintenance Procedure

a. Catalog Maintenance Procedures > Global Changes (manage-21). **NEW** opportunity for MnPALS libraries to make global changes to their BIB and/or HOL records. Libraries will be able to use this service ONLY when their Library Director signs off on a usage statement designating a librarian at a specific institution to perform global changes. **Training will be provided by the PALS office on the usage and caveats of using this service.**

This service enables you to change all catalog records that meet your selection criteria. Alternatively, you may choose NOT to change the records at this time, but only to produce a report of records that are eligible to be changed according to the criteria you enter in this form.

The OWN field of each record is checked against the logged in user's OWN permission (Z66-USER-OWN-CHECK). If there is no match, the record will not be handled by the batch job.
1.6 New General Services

a. General > Batch Jobs Summary Report (sys-90). This service reports batch jobs that have been executed during a defined range of time.
1.7 Custom Services - Customized (MnPALS) Reports Consolidation and Re-numbering

Version 19 has a new limit on privileges for custom reports. Because of this the custom reports (mnpals-##) have been grouped appropriately based on where the data is being pulled from. There are now multiple reports in some groups and radio buttons are used to choose among multiple reports in the group. In the Cataloging Module, they are listed under the Services dropdown menu/Custom Services.

The groups are called p-priv-01, p-priv-02, etc. In the Batch Log, the Log File column will show the group name, if there is one. The filename you assigned to the Output File will appear in the Task Manager in the Parameters column in the Batch Log, as well as in the Remote Name column of the File List.
2. TASK MANAGER

If you use Task Manager, it must be turned on in the staff permissions.

The Task Manager interface has been removed from the ALEPH menu, and is now found in the Admin tab, which is found in all modules. The former tabs of the Task Manager, i.e. File List, Batch Log, Batch Queue and Print Daemon are all now nodes in the Admin tab.

The [J] File List node only has one additional function in Version 19:
• Clear Filter button - This button is used to view all of the printouts in the directory, and remove a filter which was created by using the ‘View Printouts’ button on the Batch Log node.

The [A] Batch Log node has been enriched with the following:
• Filtering options, ability to filter the batch jobs list by various options such as type of job, status of the job and date of execution.
• Sorting options, ability to sort the jobs list by date of execution, job type and job status.
• Service Form button - Option to view the submitted form in a readable form, as is possible from the History menu.
• View Printouts button - Option to view the jobs printouts as viewed in the file list node.
• Batch File tab – Provides fuller and richer information, such as batch job submitter, batch jobs printouts and batch job statistic, all taken from the new Z100 table.
• Log File tab – Allows us the option to view the jobs’ alephe_scratch log files within the GUI client.
The [Q] **Batch Queue node** and [D] **Print Deamon node** have not changed functions in version 19.

3. **STAFF PERMISSIONS and PRIVILEGES**

   Staff permissions and privileges have changed with ver. 19. Refer to your Systems Librarian for this information.

4. **HOLDINGS**

   4.1 The update date can now be added to the Holding record’s 008 field positions 26-31.
a. Open the Holding Record in the Catalog Editor

i. NOTE: The top bar is still set to SYS01. You must change this by Connecting to SYS60.
ii. Now that you are in the SYS60 library, you can apply the Fix Routine.

b. Edit Actions menu > Fix Record

c. Fix Routine dropdown menu from the ‘Choose Fixing Routine’ box. Choose “Enables add update date pos. 26-31 008 HOL”
d. Click OK. Watch the update date change to today's date!
5. ITEMS

5.1 Item Process Status Update Date

Z30-PROCESS-STATUS-DATE – Item process status update date. This is a new Z30_Item record field that records the last date in which the Item process status field is updated.

A new Item Process Status Update Date field has been added to the item record, which records the last date on which the item process status field was updated. This new field, together with a new table (Tab42) allows functionality in the Serials module for automatic handling of process status changes for new items. This Item Process Status Update Date field may also be used as a filter to retrieve item records in the General Retrieval Form (ret-adm-01) service.

This will allow:
  
a. Retrieve item records by their Item Process Status Date using the batch service “General Retrieval Form (ret-adm-01)”

![General Retrieval Form (ret-adm-01) - TST50](image)
b. Supports a display in Item Expand – tab1. Item Display of Item Record

5.2 Ignoring Analytical Links to Serial Items that were Bound (this needs to be tested by libraries using Serials or Analytical Links)

This is a new tab100 variable that can be used to ignore analytical links of the BIB record, made via item link (e.g. LKR type ANA and ITM) to serial items that were or will be bound.

Example of Bib Record with LKR:
LKR $a ITM (case-sensitive, must be upper case)
   $i XXX50 (3-digit code of the ADM library and 50. This indicates that this record is linked through the ADM record (one item record) to the parent BIB record).
   $b Aleph ADM system number
IF THEY ARE AVAILABLE, USE the following subfields from the Parent BIB’s Item Record, Tab5. Serial Information; e.g. the pieces of enumeration: volume, number, part and chronology: year.
   $v vol.
   $i number
   $p part
   $y year

Tab100 setting can be set individually by each ADM
   # MATCH-Z30-ISSBD
   # Values:Y N Default: N
   # Type: Text; Max Length: 01
   # tab100 of library: Yes; tab100_<server_type>: No.
If Default is CHANGED to: Y = the system will ignore all analytical links except the ones to the Item record, Tab5. Serial Levels of ENUMERATION-A (volume), ENUMERATION-B (number), ENUMERATION-C (part) and CHRONOLOGICAL LEVEL-I (year) for the display of bound items (MATERIAL TYPE=ISSBD or ISSUE).

5.3 New Items Sort Options

(2) New items sort options available are:

- Sublibrary/collection/enumeration/chronology/copy
  - If an item does not have Enumeration and/or Chronology information, but there is a Description, the sort will be in the following way: Sublibrary/Collection/Description/Copy
  - If there is no Enumeration and/or Chronology information and no Description, then the sort will be by: Sublibrary/Collection Copy
- Items may be sorted only by their Barcode

5.4 Automatic Setting of Copy Number

It is now possible to automatically set item copy numbers in order to distinguish between identical copies of the same title.

- This may be done by clicking on New to create a new item record.
- Click the Hol. Link arrow to choose the correct Holding Record number.
- Click Refresh to bring in the location information from the Holding Record.
- Enter the correct Item Status, Material Type and any other information.
- Place a question mark ‘?’ in the Copy Number field of the Item Form.
- Click Add.
  - The system will set a copy number which is an increment of 1 from the last copy number.
The Items List will depict this new Copy Id.

5.5 Notifications and Blocks at Item Change

The following options have been added to the process of changing an item’s information:
- It is now possible to block changing any item’s item status if the item is on loan. This block is set up by setting the CHANGE-ITM-STS-LOAN tab100 variable to N in the ADM library’s data_tab_directory. This variable is relevant for both online and offline item updates.
(NOTE: xxx50/tab/tb100 is set like the following):
!# CHANGE-ITM-STS-LOAN
!# Values: Y N Default: Y
!# Type: Text; Max Length: 01
!# tab100 of library: Yes; tab100_<server_type>: No.
! Y = Allow change of item status if item is on loan
! N = Block change of item status if item is on loan

The default setting is ‘Y’ on CHANGE-ITM-STS-LOANS. This tab100 parameter is set by the PALS office for each library. Libraries who wish to change this setting, should send in a request via the Support Center.

- It is now possible to get the following notifications about an item during the item update:
  - Item is on loan
- Item has hold requests

- Item has booking requests
5.6 RFID Button removed

The RFID button, previously found in the Items tab where RFID is activated, has been removed. Now, when RFID is activated, any item update will automatically attempt to update the RFID Reader. This is true regardless of which RFID vendor’s equipment is used.

5.7 Delete Item Records (item-11)

A new ‘Record Management’ parameter enables deleting BIB or HOL records that have become orphaned as a result of the item being deleted. Choosing 'Delete' will delete HOL and BIB records which were connected to the items removed, and are now not in use by any item. Choosing 'None' will only delete the items without checking the HOL and BIB records.

a. Create the input file via ret-adm-01
b. On the bottom of the ret-adm-01 service workform, Batch Report should be check-marked NO. This is so the report can be used as an input file to the next service workform.

c. Go to the Task Manager, connect as TST50 to see that the report has SUCCESSFULLY completed.
d. Use the above filename as input for item-11 (Delete Item records)
   i. Update Database – Choosing 'Yes' will make the deletions in the Database. Choosing 'No' will only report the items that should have been deleted, but will not make the deletions in the Database.

ii. Record Management (NEW) – Choosing ‘Delete’ will delete HOL and BIB records which were connected to the items removed, and are now not in use by any item. Choosing ‘None’ will only delete the items without checking the HOL and BIB records.
e. Read the HELP for the other options
   i. Items Report File Name - suffix_deleted is the report of deleted items.
      Suffix_not_deleted is the report of items that could not get deleted.

ii. Notices Files Name – this contains the notices to the patrons whose requests
    have been deleted.

6. INDEXING

6.1 YRR – Date range can now be indexed

It will retrieve all records between dates in the Publication date 1 and Publication date 2
for USMARC records based on the Type of Date/Publication Status (008/06).
   For example, 008/06=c (continuing resource currently published and 008/07-10
   (Date 1) = 1990 and 008/10-11 (Date 2) = 1999. The search would be done like
   this: 1990->1999. The results would be all continuing resources currently
   published in the date range of 1990-1999.

The current index of WYR (word index on year) does not do the complete range of a
   title. It retrieves records from Publication date 1 and/or Publication 2, but not
   necessarily that they are both on one bib record.

6.2 Prioritizing Ongoing Indexing

Processing of records waiting to be indexed used to be indexed like this:
   a. new records created within Aleph before updated records
   b. online cataloging records before batch records
   c. records loaded through the OCLC server the same as online cataloging
   d. records loaded through the RLIN server after online records, but before batch
      records.
It is now possible to change these priorities. For the batch load of jobs, there is an ‘Override Indexing Priority’ parameter. Type a year that is lower than the current year. The content of the variables is a four-digit number for a year, in the desired priority sequence. For example, setting 1921 for p-manage-18 and 1923 for p-file-90 will cause records loaded through p-manage-18 to be processed before those loaded by file-90.