Remote Database
Update: CALIS

Version 18.01 and Later

ExLibris *The bridge to knowledge*

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ExLibris Aleph

1 Overview

CALIS is the Union Catalog of China. ALEPH gives an option to upload local Bibliographic records into CALIS. The upload is performed via the Z39.50 protocol using special software component CALISZ, supplied by CALIS. ALEPH users can insert new records into CALIS or replace existing records.

CALIS has two databases. The first, "we_cat", contains records in western languages in USMARC format and the second, "cn_cat" contains records in Asian languages in CNMARC format. ALEPH user can upload local USMARC records into "we_cat" and local CNMARC records into "cn_cat" database.

The upload of a local record into CALIS is done from Catalog GUI using the Remote menu. The Remote menu for CALIS has two options:

- Add Record (CALIS)
- Update Record (CALIS)

The "Add Record" option is enabled when the local record does not exist in CALIS and thus does not have field 099 with CALIS record ID.

The "Update Records" option is enabled if the local record exists in CALIS and has field 099 with corresponding CALIS record ID.

2 Remote Cataloging Services

There are several options for using the Remote Cataloging functionality:

- Searching CALIS' Catalogs "we_cat" and "cn_cat" using the Search function in the Cataloging GUI

- Copying a record from a CALIS' Catalogs "we_cat" and "cn_cat" into the Local Catalog using Catalog GUI

- Updating a record in CALIS Catalogs, using the Remote menu in the Cataloging GUI. It contains the following commands:

    o Add Record (CALIS)
    o Update Record (CALIS)

2.1 Add Record (CALIS)

To insert a new record to CALIS, ALEPH user should load a local record into Cataloging GUI Record Editor. USMARC records should have field 245 with subfield $a containing the record title. CNMARC records should have field 200 with subfield $A containing the title in pinyin in Latin letters.

User should click the Remote menu and click the "Add Record (CALIS)" option. ALEPH sends the following data to CALIS:

- Bibliographic record in format MARC 2709 with encoding UTF-8
- Local library code
- CALIS library name

A new Bibliographic record is added to CALIS. It contains a special field, field 920, with the local library code.

CALIS returns a message regarding the status of the added record. It is displayed to the ALEPH user.

If the record was added to CALIS successfully, field 099 with corresponding CALIS record ID is added to the local record.

2.2 Update Record (CALIS)

To update a record in CALIS, an ALEPH user should load the local record into the Cataloging GUI Record Editor.
The record should have field 099 with the CALIS record ID (this indicates that the record should already be in CALIS).

ALEPH users can perform two types of updates:
- Holdings update
- Record data change

To perform a Holdings update, the ALPEH user should simply click "Update Record (CALIS)".

To change the CALIS Bibliographic record, the user should perform the desired changes in the local record, add subfield $b with value "u" to field 099, and click "Update Record (CALIS)". The option to save the record in the local database is prompted automatically.

In both cases, ALEPH sends the following data to CALIS:
- Bibliographic record in format MARC 2709 with encoding UTF-8
- Local library code
- CALIS library name

If there are no changes in the Bibliographic record, CALIS simply adds field 920 with the local library code to its record. If there are changes in the record (field 099 in the supplied record has subfield $b with value "u") CALIS performs the corresponding changes in its record and adds field 920 with a local library code to its record.

CALIS returns a message regarding the status of the added record. It is displayed to the ALEPH user.

3 User Permissions

An ALEPH user must have the following permissions in order to update records in a remote catalog via Z39.50:
- CATALOG/UPDATE
- CATALOG/REMOTE-UPDATE

4 Configuration

4.1 XXX01/pc_tab/catalog

There are two settings which need to be made:

1. calis_params.dat is defined in pc_tab/catalog of the Bibliographic library. The table contains CALIS connection parameters. The table has 2 columns. First column contains the parameter code, second column contains the parameter value.

The table should contain the following parameters:
- HOST - CALIS z39.50 server IP
- PORT - CALIS z39.50 server port
- USER_NAME - user name for authentication in CALIS
- USER_PASSWORD - user password for authentication in CALIS
- LIBRARY_CODE - local library code
- CALIS_LIBRARY - CALIS library name for record uploading

Here is an example:

```
!          1                    2
!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!>
HOST               229.235.55.173
PORT               2153
USER_NAME          xxx
USER_PASSWORD      yyy
LIBRARY_CODE       123456
CALIS_LIBRARY      cal_cat
```

2. remote_catalog.dat defines the remote catalog interface. The CALIS interface should have the following setup:

```
!          1                    2            3
!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!-!!!>
CALIS               CALIS CATALOG       50
```

Column 1 contains the base code as in the Universal Gateway configuration (e.g. CALIS)
Column 2 contains the base name.
Column 3 contains the action type, which defines the Remote Database Update menu.
If column 3 contains '50' than the CALIS remote menu is presented.

This is the CALIS remote menu interface:

Note: Do not forget to update tables' package (util, m, 7) after CALIS configuration.

4.2 gui500.ini

The new setting, 'CALIS' should be defined in .\Product\Ini\gui500.ini and in .\Product\Ini\net500.ini. Possible values are Y/N.

If the CALIS setting is set to Y, the CALISZ software component is copied to the customer machine during the ALEPH installation enabling the uploading of records into CALIS.

If the CALIS setting is set to N, the CALISZ software component is not copied to the customer machine and the customer cannot upload records into CALIS.

By default the CALIS setting is set to N.

After changing this file, ALEPH should be re-installed.

4.3 menu.dat

menu.dat under .\catalog\tab\eng\ should contain the following lines :

```
ADD_RECORD_CALIS                        &Add Record (CALIS)
UPDATE_RECORD_CALIS                     &Update Record (CALIS)
```

4.4 message.dat

message.dat under .\catalog\tab\eng\ should contain the following lines :

```
!             1                         2           3  4 5     6
!-----------------------------!-------------------!---!-!-!-------->
CalisConfigurationError       ALEPH Catalog-Calis  O     E CALIS
configuration error.
CalisConnectRequestError      ALEPH Catalog-Calis  O     E Failed to
connect to the CALIS server.
CalisConnectResponseError     ALEPH Catalog-Calis  O     E Failed to
connect to the CALIS server. CALIS reported error No. %d.
CalisInitRequestError         ALEPH Catalog-Calis  O     E Failed to
initiate session with CALIS.
CalisInitResponseError        ALEPH Catalog-Calis  O     E Failed to
initiate session with CALIS. CALIS reported error: [%d] %s.
CalisUploadError              ALEPH Catalog-Calis  O     E Failed to send
Upload request to CALIS.
CalisUploadRequestError       ALEPH Catalog-Calis  O     E Failed to upload
record into CALIL. CALIS reported error: %s.
CalisUploadResponse           ALEPH Catalog-Calis  O     E CALIS Server
response: %s.
CalisInsertNoTitleError       ALEPH Catalog-Calis  O     E Cannot insert
record – no title field found.
CalisSearchError              ALEPH Catalog-Calis  O     E Failed to send
Search request to CALIS.
CalisSearchRequestError       ALEPH Catalog-Calis  O     E Failed to send
Search request to CALIS. CALIS reported error: %s.
CalisSearchResponseError      ALEPH Catalog-Calis  O     E Failed to
perform Search in CALIS. CALIS reported error: [%d] %s.
```

5 CALIS Universal Gateway Configuration

A Universal Gateway configuration file should be created for CALIS (e.g. ./alephe/gate/calis.conf). The file should contain the following line:

Z58-ES-INSERT   es_insert_calis

The es_insert_calis program converts the local record into the form required by the CALIS Catalog, inserts it into the CALIS Catalog, and updates the local record with the CALIS Catalog information

6   Additional Information

In order to upload records into CALIS, the local library should have MARC-TYPE defined in tab100. It should be equal to 1 (USMARC) or to 2 (UNIMARC).

During insertion of new records into CALIS, a special file search0.iso is created in the directory where Catalog.exe resides (.e.g .\Catalog\bin). The file is created by the CALISZ software component.

Before inserting a new record into CALIS, ALEPH automatically performs a search in CALIS for the record title (field 245, subfield $a when the USMARC record is inserted, field 200, subfield $A when the CNMARC record is inserted).

The CALISZ software component stores the search history in this file.