



# **System Librarian's Guide – Course Reading and Reserves**

Version 22

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# 1 Overview

The Course Reading and Reserves operations are managed via the Course Reading node in the Administration tab of the Circulation GUI client. The System Librarian is responsible for setting up the Course Reading library, adapting dropdown lists and display parameters, and maintaining Course Reading Databases.

The building blocks for Course Reading and Reserves are Course records and Bibliographic records. The Course records are the Z108 Oracle table. There are two types of BIB records, and it is important to understand the difference and functionality of each. One type of BIB record is the cataloging metadata record, which contains the description of the work (a book, a journal article, etc.). The other type of BIB record contains linking data, to connect between the course and the bibliographic records which make up its reading list. This second type of BIB record (a connection BIB) is an internal ALEPH structure; in addition to the default fixed fields, it contains only a CNO field (link to course) and an SID field (link to bibliographic record). It is system-created when a title is added to a Course Reading list.

The Course Reading setup requires a separate database (library) parallel to the Administrative library. In the ALEPH demo setup, this is the USM30 library. In a multi-ADM setup, each institution (ADM) that uses Course Reading has a parallel Course Reading library (e.g. USM51/USM31).

True bibliographic metadata records should never contain course links. The links should always be held in the separate connection record. The bibliographic records for the Course Reading and Reserves Collection can be cataloged in the library's main database (in the ALEPH demo setup this is USM01), or they can be cataloged in the Course Reading Database. Using records already cataloged in the regular catalog saves cataloging effort; cataloging in the Course Reading database keeps the main database free of extraneous records (such as photocopies, scanned documents and private material).

The Union View mechanism is applied to the Course Reading database so that titles that are listed for more than one course will be virtually merged into a single record for view in the OPAC. Therefore, records that are linked to more than one course will display as a single de-duplicated record, with the course information from all the de-duped records merged in the single record display.

## 2 Setup

There are two preliminary tasks for the System Librarian in the setup of Course Reading:

- Creating the Course Reading library (typically as XXX30).
- Linking the new Course Reading library to the Administrative library (in `library_relation`)

There are two additional initial tasks, not necessarily performed by the System Librarian:

- Creating users, or adding Course Reading privileges to existing users.
- Creating a borrower (patron) record for each Course Reserves Unit, in order to enable placing hold requests for pick lists.

### 2.1 Creating the Course Reading Library

This library should be based on the ALEPH demonstration Course Reading library called USM30. The document, *How to Open a New Library*, describes the creation of a new library.

#### 2.1.1 Application of Union View

In addition to standard BIB library setup, the Course Reading Library can be set up as a Union View library. Refer to [Section 10 Union View](#).

### 2.2 Linking the Course Reading Library to the ADM library

When the library has been created, in addition to the standard definitions for BIB, HOL, and ADM in the `./alephe/tab/library_relation` configuration table, the library must also be defined as a Course Reading library as in the following line:

```
CRS USM50 USM30
```

In a multi ADM-library environment, the course reading library will only show items of the related ADM library.

### 2.3 Staff User Privileges

Refer to Section 2 of the *ALEPH 19.01 Staff User Guide - Course Reading and Reserves* for information on staff permissions that are required for working with Course Reading.

### 2.4 Patron Record for Each Course Reserves Unit

Hold requests can be placed on items intended for transfer to the Reserves collection. The operator must enter a user ID to which the request will be registered. This user is a standard patron, created specifically for this purpose. The creation of a patron record for a Course Reserves Collection is carried out via the Circulation GUI.

#### Note

You should assign a status that is not limited for the number of requests and which has privileges for multiple-hold requests.

### 3 Course Records

A course is identified for the operator by the **course number**. In cases where the course number is not unique, additional information, such as instructor or course dates, is required in order that the operator be able to identify the course.

Internally for the system, a course is unique and identified by the course number to which an internal course sequence number is appended. The sequence number serves to differentiate between different courses that use the same course number.

There are two types of Course Records:

- Common course records

This type of course is optional. It provides efficient management of reading lists for multi-session courses, enabling one-time registration of reading material for all sessions of a course. It is suitable for use when there is a list of reading material that is used in common by all the instructors of all the sessions of a course. The advantage in using this type of course is that although the material is listed only once, it is included in search and display for all sessions of the course. The common course record does not have instructor or active dates. In addition to material registered to a common list, the existence of a common course does not preclude the option of adding specific reading materials to specific sessions of the course.

- Individual course records

This is the actual classroom course, and must have an instructor and active dates. An individual course is linked to a common course by virtue of the fact that they have the same course number. Since most courses at a college/university are taught in a single session only, most course records will not be linked to a common course.

If an individual course is linked to a common course, the reading list for the course includes both the individual course's reading list and all the common course's reading list, displayed in one sequence. Entries from the common course are displayed and indexed for each of its individual courses. The individual course can have additional entries of its own.

If the course does not have the same course number as a "common" course, it will have only the reading list entries that have been registered for it.

**Special Note for Course records that were upgraded from ALEPH WEB Course Reading system to GUI-Circulation Course Reading system:**

If Web Course records have no value in the 'Instructor Name' field, the Course Upgrade routine sets the Instructor Name field to INSTRUCTOR.

After the upgrade is completed, you may open the GUI-CIRC-Course List window, retrieve all courses by instructor name, INSTRUCTOR, and update the Instructor Name field with the relevant value.

## 4 Reading List Records

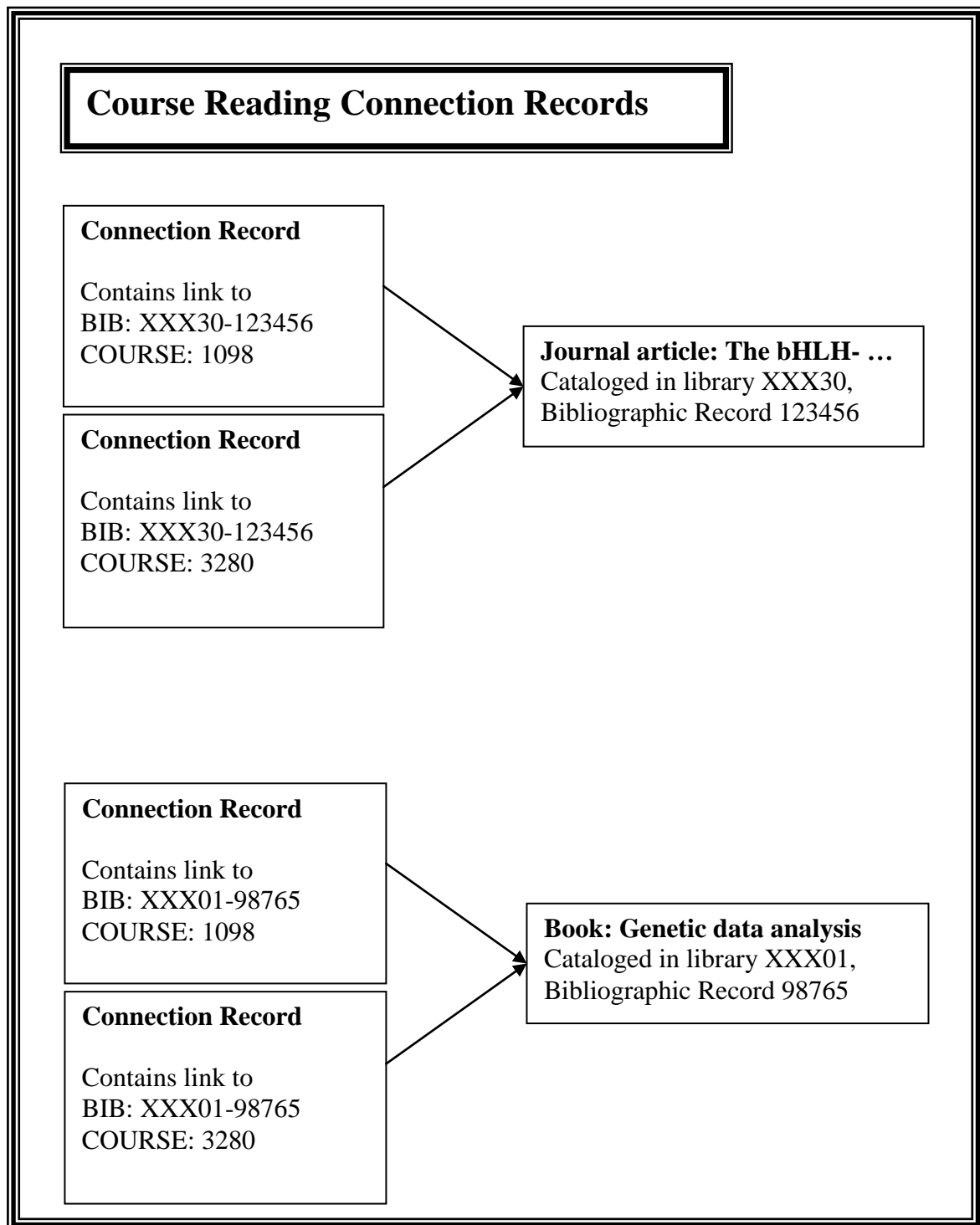
The Reading List record is a BIB record that contains links to a course and to a bibliographic record in the same or another library's catalog. This record includes:

- Default fixed fields
- CNO field (link to Z108 Course record)
- SID field (link to bibliographic record)
- Up to four note fields, specific to the bibliographic record within the context of the reading list (e.g. pages or chapters that are relevant)

When the Reading List record is displayed (in the WEB OPAC, in the Course Reading GUI client, or in the Search tab of the GUI client), the bibliographic data and the course data are expanded into the Reading List record.

The following diagram illustrates the relationship of the records and their links in the Course Reading library.





## 4.1 Linking fields

The CNO and SID are linking fields that are used by expand-doc-course and expand\_doc\_merge\_union\_crs to add Course data and Bibliographic data to the Course Reading linking record. Course data is added using the CNO link, and bibliographic data is added using the SID link. These expand procedures build virtual fields for course name, number, instructor, etc., and full bibliographic information.

## 4.2 expand\_doc\_course

This expand program adds all the bibliographic data (retaining bibliographic field tags) and the following course information in "CNO..." fields; the parts of the CNO fields are separated by hyphens, as shown.

These fields can be used for indexing and for display in the OPAC. Refer to [Section 6 Indexing](#), to [Section 8 Configuration Information](#), and to the USM30 setup of tab11\_word, tab11\_acc, tab00.eng and edit\_field.eng for examples of their use.

CNO-0	\$\$a Z108-COURSE-NUMBER \$\$b Z108-COURSE-NAME \$\$c Z108-INSTRUCTOR-NAME \$\$n (repeated)*Z108-PERIOD \$\$e Z108-DEPARTMENT
CNO-1	\$\$a Z108-COURSE-NAME
CNO-2	\$\$a Z108-COURSE-NAME – Z108-INSTRUCTOR-NAME
CNO-3	\$\$a Z108-INSTRUCTOR-NAME
CNO-4	\$\$a Z108-INSTRUCTOR-NAME – Z108-COURSE-NAME
CNO-5	\$\$a Z108-DEPARTMENT
CNO-6	\$\$n (repeated)*Z108-PERIOD
CNO-7	\$\$a Z108-UNIT
CNO-8	\$\$a Z108-COURSE-NUMBER – Z108-INSTRUCTOR-NAME
CNO-9	\$\$a Z108-INSTRUCTOR-NAME – Z108-COURSE-NUMBER
CNO10	\$\$a Z108-COURSE-NUMBER – Z108-COURSE-NAME – Z108-INSTRUCTOR-NAME
CNON1	\$\$a NT1
CNON2	\$\$a NT2
CNON3	\$\$a NT3
CNON4	\$\$a NT4

CNO-6 is the period during which the course takes place. For example: Winter, Spring, and so on. The values are stored in the CNO-6 field in the following format: \$\$n<period>. *n* is a number from 1 to 7. For example: \$\$1Spring. If the course is valid for more than one period, the field is filled with a series of values, each value in a separate subfield, with no spaces in between. For example: \$\$1Spring\$\$2Summer.

Note that if the record is connected to a common list, the expanded information will be added for each section of the course.

In addition, subfield \$\$8 is used in the course information, in order to group together all the information of one course.

## 4.3 Grouping of Expanded Fields

The Course Reading public access Web interface is based on Union View architecture, with virtual de-duplication and merged display of records that are detected as being the same in order that bibliographic records linked to more than one course will display as a single de-duplicated record. In order to retain course information grouped by course, a sequence number is added to each CNO field created by the program.

CNO-0	\$\$8 <sequence>
-------	------------------

```

$a <course number>
$b <course name>
$c <course instructor>
$d <period>
$e <unit>
CNO-1      $8 <sequence> $a <course name>
CNO-2      $8 <sequence> $a <course name> - <course instructor>
etc.

```

#### 4.4 expand\_doc\_merge\_union\_crs

This expand procedure is required for the application of Union View to the Course Reading database for OPAC. This procedure adds bibliographic and course data to the Course List (connection) record. It adds all the bibliographic data (using the SID link) and the course information of ALL the courses/sections that have this same SID (i.e. are linked to the same bibliographic record). This is done using the Union View Z120 table, which groups together all documents that share a common SID. To display only active courses, add the "ACTIVE" parameter in col 3 of the tab\_expand. (For more details regards the union view setup, see section [10 Union View](#).)

## 5 Course Period and Logical Bases

### 5.1 Period

In USM30 Course periods have been set for Winter, Spring, Summer, or Not Active. Different or additional periods can be defined in the COURSE-PERIOD section of the ADM library's ./tab/pc\_tab\_exp\_fields.<lng>.

The **Period** field is indexed in the "wpe" word file in USM30.

### 5.2 Logical Bases

#### 5.2.1 Period

You can create a logical base for the course period and enable the user to search in the Web OPAC interface for a course according to a period.

In order to enable limiting a search according to the time period, you must define logical bases in the tab\_base table based on "wpe". Note, however, that if you use common lists you cannot use "alldocuments not ..." for the period. For example, "alldocuments not na".will not function as needed, and you must exclude a group by not including it in the FIND definition (e.g. wpe=(winter or spring or summer)). If your library uses the "suppressed" option for records in a Course Reading list, remember to define "suppressed" as part of the FIND command in tab\_base.

In the following example:

- USM30 displays all records; this should be used for the Search in GUI.
- U-USM30\_1 is union view display, limited to records listed for courses that have period "winter", and not including suppressed or deleted records
- U-USM30\_2 is union view display, limited to records listed for courses that have period "spring", and not including suppressed or deleted records
- U-USM30\_3 is union view display, limited to records listed for courses that have period "summer", and not including suppressed or deleted records

```

USM30                               Course Reading - Complete           USM30 N
U-USM30_1                           Course - U.V.Winter   USM30           USM30 N
wpe=winter not wst=(suppressed or deleted)
U-USM30_2                           Course - U.V.Spring   USM30           USM30 N
wpe=spring not wst=(suppressed or deleted)
U-USM30_3                           Course - U.V.Summer   USM30           USM30 N
wpe=summer not wst=(suppressed or deleted)

```

## 6 Indexing

Indexing in the CR library (XXX30) is done in the same manner as in a BIB library. For this purpose the following library's tables should be set: tab11\_word, tab11\_ind, tab11\_acc, tab00.lng, etc.

Note that after editing any of these tables, the XXX30 database should be re-indexed: Indexing of the Course Reading database is carried out via the Cataloging GUI, from where the Indexing services are run.

In addition, the ue\_01 procedure must be consistently run in order to perform on-going indexing.

**Note: To allow searching and browsing of CR records via WEB OPAC; the OPAC HTML files must quote the relevant index codes.**

### 6.1 Browse Indexing (tab11\_acc)

In addition to the bibliographic indexes, the course information can also be indexed. Following is the full list of course indexes:

Index Name	Field Code	Subfield Code	Index Code
Course Number	CNO-0	a	CNO
Course Name	CNO-0	b	COU
Department	CNO-0	e	DEP
Instructor	CNO-0	c	INS
Course Number + Instructor	CNO-2	a	COUIN
Instructor + Course Name	CNO-4	a	INSCO
Period	CNO-6		PER
Course Name + Instructor	CNO-8	a	CONIN
Instructor + Course Number	CNO-9	a	INSCN
Course Number + Course Name + Instructor	CNO10	a	CONNI

This is maximal setup. You might not want to use all these indexes in your library.

## 6.2 Search Indexing (tab11\_word)

The Word Indexing of the Course Reading database can use bibliographic data (as words from titles, authors, subjects, etc.) as well as Course information such as words from course number, course name, department, instructor and period.

The STA (status) field is indexed in "wst". The "wst" index is used for excluding suppressed or deleted records from the OPAC view.

## 6.3 Direct Indexing (tab11\_ind)

Direct indexing has been set up for purposes of internal structure and staff functions, using SID, CNO and CNO-S.

The following lines must exist in your XXX30/tab11\_ind:

SID	SID	a
CNO	CNO-S	a
CNO-0	CNO	a

**Note:**

The CNO, CNO-S, SID indexes must not be renamed.

## 7 E-Reserves

### 7.1 Introduction to E-reserves

The home of e-Reserves (Electronic Reserves) in ALEPH 500 is the Course Reading library (for example, USM30). e-Reserves uses the standard Course Reading tools and workflow. The e-Reserve title is linked to a Course and cataloged either in Course Reading or in the BIB library.

E-Reserves are items which are available electronically via the library's Web OPAC. The Web OPAC is used by students and professors to perform such tasks as searching (by course, instructor name, and so on) and displaying and activating files.

The purpose of e-Reserves in ALEPH is to regulate access to items available via external links (856) based on course enrollments. Files can be in any electronic format.

Here is a specific example: e-Reserves must allow Student A to access File B which is linked to Course C - provided that Student A is enrolled in Course C. Conversely, e-Reserves must block Student A from accessing File B which is linked to Course C - provided that Student A is not enrolled in Course C.

E-Reserves functionality is based on extended services related to the subfield u of the 856 (Electronic Location and Access) field in the MARC21 standard. Subfield u defines the URL for locating an item using existing Internet protocols.

## 7.2 Copyright and Use Permission Form

Copyright law governs the right to prepare derivative works, to reproduce a work or portions of it, and to display or perform a work in public. The Copyright mechanism in the e-Reserves module lets a library regulate access in terms of user permissions.

The e-Reserves librarian is responsible for setting up copyright and usage permissions for each e-Reserves item. These permissions are set up in the Copyright form in the Course Reading interface or directly input in the Bibliographic record in the Cataloging module. ALEPH proprietary use of subfield \$\$4 in the 856 field is used to store the copyright and usage permissions defined.

## 7.3 Usage Permission

A patron using the ALEPH OPAC must have “Link Permission” in his profile in order to view an object. In addition, there are three levels of usage permission that can limit viewing an object:

- **Open use** - When a Web OPAC user clicks the link in the bibliographic record, he receives the object immediately without having to sign a copyright agreement.
- **Open use with copyright statement** - When the Web OPAC user activates the link in the bibliographic record, a copyright notice appears. The user must sign this copyright agreement in order to receive the object.
- **Use is allowed to patrons who are registered in the course** - Only patrons who are registered in the course to which the bibliographic record is related are given access to the object. The system recognizes patrons as being registered in the course after they have signed in.

If a patron does not meet the usage conditions set for accessing an object, e-Reserves blocks the patron from accessing the file.

For example, if a student fails to sign in when searching the Course Reading OPAC, a message displays if he attempts to view a file associated with a course.

There are three messages associated with usage permission blocks. The messages are taken from \$aleph\_root/error\_lng/media\_heading:

```
1006 0000 L Object is only permitted for course(s) $1
1007 0000 L This link is limited to students registered in
specific courses. Please view it through the Course Reading
Catalog. [this message displays when the bibliographic record is displayed in
the regular OPAC, and not through the Course Reading OPAC]
1008 0000 L Object is only permitted for courses, but no course
is linked.
```

Conversely, if all of these conditions are met, e-Reserves lets the patron access the file (if necessary, after he reads the Copyright statement and clicks **OK**).

### 7.3.1 Usage Permission Configuration

The following lines should exist in your XXX30/tab/ tab\_buf\_z403:

```
##### get_buf_z403_course      856##, ,y,*,Y,
##### get_buf_z403_course      856##, ,y,-,U,
```

### 7.3.2 Setting up Usage Permissions

To set up usage permissions in e-Reserves:

Usage permissions in e-Reserves are handled using subfield 4 (a special ALEPH subfield) in the 856 (Electronic Location and Access) field. The subfield 4 information can be entered in the bibliographic record in the Cataloging GUI, or through the Copyright form in the Course Reading module.

There are three options for usage permissions:

- **Open use** - \$\$4 = Y  
No copyright message appears.
- **Open use with copyright statement** - \$\$4 = blank or non-existent  
A copyright agreement appears and must be signed in order for the user to be able to access the resource.
- **Use limited to users who are registered in a given course** - \$\$4 = E  
Usage includes option Y above and viewing resources is allowed only for users who are registered in the course. Course registration is regulated by the Z107 (e-Reserves Course Registration) table.

The Z107 record contains the patron's ID and the course number of the course in which the student is enrolled. If a student who is not enrolled in a specific course attempts to view a file associated with that course, a message will display.

There are additional subfields in the 856 field which contain information about the object's provider and related charges:

\$\$V - vendor/provider code  
\$\$F - type of fee  
\$\$C - fee amount

These subfields are optional and for information purposes only.

The data for the Z107 table can be loaded from a flat file. To do this, you use the Import Database Tables - Without Checks (file-04) service which is accessed from the Manage Database Tables submenu of the Services menu.

You import the files into the ADM (for example, USM50) library. In the **Table to Import** field, enter the file name `z107`. After the service has been run, the files can be found in the `xxx50/files` directory.

The flat file structure (for `p_file_04`) is:

Z107-ID. Positions 1-12 only. This is the user's identification key. The relevant ID number must match a valid Z303-ID).

Z107-COURSE-NUMBER. Positions 13-30. This course number must match a valid Z108-COURSE-NUMBER.

For example:

```
User ID      Course Number
1-12        13-30
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
123101      100-12
123103      100-12
123105      100-12
123106      100-13
123108      100-13
123110      100-14
123113      100-14
123115      100-14
```

## 8 Configuration Information

Indexing and Doc display configuration is set in the Course Reading (XXX30) library tables. All other configuration is set in the ADM (XXX50) library tables, or in `./alephe/`.

### 8.1 tab\_expand

As explained in [Section 4 Reading List Records](#), the Reading List records do not contain any course or bibliographic information, they only contain links. The full record in the Reading List is created on the fly by expanding it with the Bibliographic and Course information. Refer to the `./usm30/tab/tab_expand` table for setup.

The `expand_doc_crs_bib` program can also be set in `tab_expand`. This program is useful in case the BIB record is expanded from another BIB record and the course record should have information from both a related BIB record and its expanded document. When setting `expand_doc_crs_bib`, define in col. 3 of `tab_expand` the fields that will be expanded to the course document.

Sample `tab_expand` for MAB library:

```
CRS-BIB      expand_doc_mab
CREATE-Z13   expand_doc_course
CREATE-Z13   expand_doc_crs_bib          331-2,1##-2
```

In addition to expanding Bibliographic record fields into the Reading List record, the `expand_doc_course` routine creates the fields from the Course record and adds them to each connection BIB. See [Section 4.2 expand\\_doc\\_course](#) for details.

### 8.2 Hold Request Start Date for Pick List

The "request date" of a hold request created from Course Reading is set to default to *nn* days before the starting date of the course. This *nn* number of days is set in the `course_request_days` line in the `./alephe/pc_server_defaults` file.



If there is no value defined in the `course_request_days` variable, the number 14 is used as a default. (The hold request date is 14 days before the Course's open date).

This enables the library to create requests for Course Reserve material before the course is actually active.

Requests placed via the Course Reading module are automatically defined as Rush Recall type Hold Requests, the `Z37-CATALOGER-NAME` is set to "CRSE-READ", and the course number is registered in `Z37-NOTE-1`.

## 8.3 Submitting a List for Course Reading from OPAC

Patrons who have "Course Permission" in their profile can submit a list items that they want to put on Course Reading. This action, carried out in the Web OPAC from "My e-Shelf", sends an email message and saves the list on the server.

### 8.3.1 E-mail Address

You can choose to specify the e-mail address of the Course Reading administration inside the HTML file: `myshef-course` (or `myshef-course-<base name>`).

You can also use this option to build a drop-down menu of e-mail addresses where there are several course reading administrations to choose from. For example, if the following definition is present in the `SEND_MAIL` setting in the `myshef-course` HTML file:

```
<input type=checkbox name="SEND_MAIL" $$0200-C"on" value="mdewey@exlibris-usa.com ">
```

The system sends the e-mail notification message to `mdewey@exlibris-usa.com`:

If there is no e-mail address defined in the `myshef-course` HTML page, the system uses the e-mail address defined in the `www_course_email_address` environment variable present in `./alephe/www_server.conf`.

For example:

```
setenv www_course_email_address thechoice@exlibris.co.il
```

### 8.3.2 Directory for Saved List

You can define the directory on the server in which the items will be saved. The directory is defined in `./alephe/aleph_start`.

In the following example from `aleph_start`, the items will be saved in a file in `./tmp/save_cr`:

```
setenv TMPDIR ${ALEPH_MOUNT}/a${ALEPH_VERSION}
}_$ALEPH_COPY/tmp
setenv FILE_TMPDIR $TMPDIR
setenv SAVE_FILE_TMPDIR ${ALEPH_MOUNT}/a16_1/tmp/save_cr
```

If a directory is not set in `aleph_start`, the items will be saved in a file in `alephe_scratch`.

## 8.4 Linking

The `./xxx30/tab/tab_z103` table must be set up for Course Reading. The following lines should exist:

```
update_z103_lkr
update_z103_course
```

## 8.5 Course Reading GUI Configuration

### 8.5.1 Display Course Information

Setup for the HTML display of Course Information in the Course Display tab in the lower pane of the List of Courses in the CIRC GUI is set in the ADM library:

```
./pc_display_eng /course-details
./pc_display_eng /course-details.trn
```

### 8.5.2 Quick Cataloging

The configuration for the "quick cataloging" input form is in the ADM library:

```
./tab/pc_tab_crs_fast_cat.eng
```

### 8.5.3 Search Form for Course Reading

The configuration for the search form (searching for a bibliographic record in order to add it to a Course Reading List) is defined in the ADM library:

```
./tab/pc_tab_find_course.eng
```

### 8.5.4 Display Requester IDs

On the Items tab in the lower pane of a Reading List, there is a column which displays the IDs of patron who have hold requests for the item.

The number of patron IDs that displays is defined in the ADM library's `tab100` in `NUM-REQUESTERS-ID`.

For example:

```
NUM-REQUESTERS-ID=10
```

Variable can be between 01 and 99.

If the number of requests exceeds the value in `tab100`, the requests will still be registered, but not displayed in the Requesters column.

### 8.5.5 `pc_tab_col.<lng>`

The following sections of the ADM library's `./tab/pc_tab_col.<lng>` control GUI columns display:

- `PC_COURSE_LIST` – List of Courses
- `PC_COURSE_BIB_LIST` – Course's Doc List

- PC\_COURSE\_FILE\_LIST – List of Doc in Load file (Load button at the Course's Doc List window)
- PC\_COURSE\_ITEM – List of items (List of Doc, lower pane-Items)
- PC\_OTHER\_COURSE\_LIST – Other courses to which the doc is assigned (List of Doc, lower pane-Attached to Courses)

### 8.5.6 pc\_tab\_exp\_field.<lng>

The following sections of the ADM library's ./tab/pc\_tab\_exp\_field.<lng> control dropdown lists:

- COURSE-DEPARTMENT
- COURSE-UNIT
- COURSE-PERIOD
- COURSE-COPYRIGHT
- COURSE-FEE
- COURSE-DOC-SORT-TYPE - controls sorting of the reading list. These values should match the values in xxx30/tab\_sort.

### 8.5.7 View ADAM objects in the Course Reading OPAC

To view an ADAM object that is linked to a document from the main catalog (e.g: USM01) in the Course Reading OPAC, the following line should exist in the Course Reading library's ./tab/tab\_buf\_z403:

```
##### get_buf_z403_media_course      VIEW
```

In addition, www\_tab\_short and edit\_doc\_999 should contain indication about the display of the digital objects (MED, EXTL, TN).

## 9 GUI Services Templates

Following is a list of the Course reading batch report templates.

Template	Purpose
course-report Course Summary Report	Generated by course-06
course-summary Course Lists Report	Generated by course-01

<b>Template</b>	<b>Purpose</b>
course-pickup-list Course Pick Up List	Generated by course-02
course-inactive Course Not Active	Generated by course-05
course-reserve-item Remove items from Reserves Collection	Generated by course-03
course-reading-not-linked Report of Course Reading Records that are not Linked to a Course	Generated by course-04

## 10 Union View

The Union View mechanism is applied to the Course Reading database so that titles that are listed for more than one course will be virtually merged into a single record for view in the OPAC. Therefore, records that are linked to more than one course will display as a single de-duplicated record, with the course information from all the de-duped records merged in the single record display.

### 10.1 expand\_doc\_merge\_union\_crs

This expand procedure is required for the application of Union View to the Course Reading database for OPAC. This procedure adds bibliographic and course data to the Course List (connection) record. It adds all the bibliographic data (using the SID link) and the course information of ALL the courses/sections that have this same SID (i.e. are linked to the same bibliographic record). This is done using the Union View Z120 table, which groups together all documents that share a common SID.

For relevant tab\_expand setup, see Section 10.2.5 tab\_expand.

### 10.2 Configuration for Union View

The following configuration must be set for Union View, in the Course Reading (XXX30) library:

#### 10.2.1 tab100

```
UNION-LIBRARY=1
UNION-IGNORE-MATCH=SUPPRESSED
```

#### 10.2.2 tab\_base

The Course Reading database must be defined as a union database in ./alephe/tab/tab\_base.eng:

```
U-<CRS library>          Course - All USM30          <CRS library> N
```

In order to be identify as a Union View, the CR library code must follows the letter "U-" as in the following example of setting union base for USM30 :

```
U-USM30          Course - All      USM30          USM30 N alldocuments not
wst=(suppressed or deleted)
```

### 10.2.3 union\_global\_param

The CR library (XXX30) must be present in the ./alephe/tab/union\_global\_param table:

Example for USM30:

```
USM30 B candidate_prog    union_candidate_course    100
USM30 B match_prog        union_match_course
USM30 B preferred_prog    union_preferred_course
USM30 B normalize_prog    union_normalize_cdl
```

### 10.2.4 tab\_merge\_union

For correct display in the OPAC Course Reading interface, which uses Union View mechanisms, the xxx30 library must have correct setup of ./tab/tab\_merge\_union. The correct setup for the course union view is as follows, and should not be changed:

```
30 1 Y #####
30 1 N CNO##
30 1 N SID##
30 1 N NT###
30 2 Y CNO##
30 2 Y NT###
```

### 10.2.5 tab\_expand

Set the relevant sections in ./xxx30/tab/tab\_expand with expand\_doc\_merge\_union routine.

For example:

```
WEB-FULL  expand_doc_merge_union_crs
WEB-FULL-1 expand_doc_merge_union_crs
WEB-BRIEF expand_doc_merge_union_crs
```

The following line must exist:

```
PRE-MERGE expand_doc_course
```

Refer to the demo set up: ./usm30/tab/tab\_expand table for setup.

#### **Note:**

If you use PST for displaying the location, then the WEB-FULL expand\_doc\_merge\_union\_crs and WEB-BRIEF expand\_doc\_merge\_union\_crs should be placed **before** the expand\_doc\_bib\_loc\_n\_x expands.

### 10.2.6 www\_tab\_short.<lng>

For the Brief view (in table format) for Course Reading, the following fields have received special handling in order to see all the values (and not only the first one as Brief view usually does):

CNO-2 (Z108-COURSE-NAME – Z108-INSTRUCTOR-NAME)  
 CNO-4 (Z108-INSTRUCTOR-NAME – Z108-COURSE-NAME)  
 CNO-8 (Z108-COURSE-NUMBER – Z108-INSTRUCTOR-NAME)  
 CNO-9 (Z108-INSTRUCTOR-NAME – Z108-COURSE-NUMBER)  
 CNO10 (Z108-COURSE-NUMBER – Z108-COURSE-NAME – Z108-INSTRUCTOR-NAME)

Choose one of the above CNO fields and define it in `./xxx30/tab/www_tab_short.lng` for display in the "Course/ Instructor" column.

For example, to display of CNO-2, set the following line:

```
4 L Course/Instructor 02---A01---A 00 00 0100 S      ## CNO-2
```

### 10.2.7 edit\_doc\_999.<lng>

The fields displayed in Full view are defined in `./xxx30/tab/edit_doc_999.eng`. Because of the Union view mechanism, one record can contain information from many courses. This happens if the bibliographic record is listed for more than one course.

To display all the fields from each course as a group, subfield \$\$8 has been added to define the "grouping".

For example, `edit_doc_999.lng` should contain:

```
## CNO-2 8 1          D LCourse          Y Z      E      W
## CNO-6 8 1          D                  Y        E      W
## CNON1 8 1          D                  Y        E      W
## CNON2 8 1          D                  Y        E      W
## CNON3 8 1          D                  Y        E      W
## CNON4 8 1          D                  Y        E      W
## CNO-2 8 2          D LCourse          Y Z      E      W
## CNO-6 8 2          D                  Y        E      W
## CNON1 8 2          D                  Y        E      W
## CNON2 8 2          D                  Y        E      W
## CNON3 8 2          D                  Y        E      W
## CNON4 8 2          D                  Y        E      W
## CNO-2 8 3          D LCourse          Y Z      E      W
## CNO-6 8 3          D                  Y        E      W
## CNON1 8 3          D                  Y        E      W
## CNON2 8 3          D                  Y        E      W
## CNON3 8 3          D                  Y        E      W
## CNON4 8 3          D                  Y        E      W
```

### 10.2.8 Union view batches

The batch service `union_04` (update `z120/z127` records) should be running on regular basis. It is recommended that it be added to `./alephe/tab/job_list`, to run every two hours. For example:

```
W2 10:00:00 Y          USM30 p_union_04          USM30
W2 13:00:00 Y          USM30 p_union_04          USM30
W2 15:00:00 Y          USM30 p_union_04          USM30
W2 18:00:00 Y          USM30 p_union_04          USM30
```

### 10.3 Union View Indexing

If you want to re-build an existing CR database, after all the indexes are built, run `p_union_01` (build empty z120 records) and `p_union_02` (creates z120 records) once. Then create the z127 records. It is necessary to run the process to create the Z127 records after running `p_union_02` (populating empty equivalencies records table - z120). The process to create the z127 records is run from the command line and does not have any parameters. The syntax for running it is: `csch -f $aleph_proc/create_z127`.

Note that prior to running this process, it is necessary to run the Drop & Create Table and Index utility for z127 by running `util/a/17/1`.

Rebuild Record Equivalencies (`p_union_04`) should be run on a regular basis to continually update the z120/z127 records. Note that z127 triggers need to be activated.

For more information regarding the Union View mechanism, refer to *How to Set Up and Configure Union View for Your OPAC*.