



ALEPH VERSION 19.01

Upgrade Express 18.01 to 19.01 User Guide

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1. Introduction

The ALEPH integrated library system is constantly under development in order to accommodate ongoing changes in automated library market requirements, respond to ALEPH customers' development requests, and adopt and integrate new hardware and software technologies. Ex Libris releases a new version of ALEPH annually that includes new features and enhancements to existing features and is compliant with new hardware and software technologies.

The ALEPH upgrade process is the process of replacing a version of ALEPH with a newer version. The main objective of the Upgrade Express is to perform the upgrade of ALEPH versions quickly and efficiently so that the cutover phase will take less than 36 hours (a weekend). It is important to note that during this period, the library's OPAC can function in read-only mode. In other words, activities such as hold requests, photocopy requests, and so on are disabled.

The methodology of Upgrade Express is simple. A copy of the 18.01 **utree** and database is added to the new version, ALEPH 19.01. This creates an ALEPH 19.01 software environment with 18.01 configuration and data. From this upgrade, it is possible to use utilities to copy the utree. For details, see the appendix to this document.

It is also possible to upgrade from lower versions, such as v.16 to v.19, without installing v.17 and v.18. In this case, a copy of the 16.01 **utree** and database is added to the new version, ALEPH 19.01. Minor changes need to be made to allow login. After these changes, the upgrade process is executed three times (v.16 to v.17, v.17 to v.18, v.18 to v.19). It transforms the configuration and data into the ALEPH 19.01 format.

Note that when upgrading from a lower version than 18, all the documentation of the previous versions of the Upgrade Express (such as 16 to 17 and 17 to 18) must be reviewed. One of the main issues to consider is the upgrade of the Oracle version.

This process can be performed several times for testing before the final cutover. We highly recommend performing at least one test.

Although much of the upgrade is performed automatically, some configuration has to be performed manually -- for example, the implementation of changes to Web files. Some of these changes may take longer than 36 hours. For this reason, there is a mechanism to store these changes during the test phase and restore them instantly during the cutover phase.

This document explains, step-by-step, how to perform the upgrade from ALEPH 18.01 to ALEPH 19.01 using the Upgrade Express.

2. Upgrade Conventions and Requirements

2.1. Conventions

The Upgrade Express documentation refers to the “source” and “target” versions or environments.

The **source version** is the current ALEPH version environment that the customer would like to upgrade. In this document, the source version refers to ALEPH 18.01.

The **target version** is the new production ALEPH version environment that is the target of the upgrade process. In this document, the target version refers to ALEPH 19.01

2.2. Upgrade Options

- **Option 1** – Run the Upgrade Express "inside the database." If you use this option, the version 19.01 software is installed in parallel with the version 18.01 software and is connected to the same database as version 18.01. Only one version can be active at any given time (version 18.01 before the upgrade and version 19.01 after the upgrade). The advantage of this method is less downtime. The disadvantage is that if the upgrade fails, a restore from backup will be required. The risk of a failure is not any higher than during the usual working of the system, as the upgrade kit runs SQL scripts inside the database in order to upgrade the data. A full cold backup before the upgrade is absolutely necessary.

If you choose Option 1, you should be aware that after running the Upgrade Express, version 18 will no longer be available. This is due to the fact that the version 18 database will be used by version 19. This method, therefore, is only suitable for those sites that have a test installation of ALEPH, or for those sites that are not currently in production.

Option 2 – The Upgrade Express can also be run in a separately installed database. If you use this option, the version 19.01 software is installed together with a new database. The advantage of this method is that if the upgrade fails, you can continue working on the old database while the problem is being fixed. The disadvantages are more downtime and the necessity for more disk space.

If you choose Option 2, before you can run the Upgrade Express, you will need to bring your data to the newly installed instance. There are two methods for doing this:

- **Import and Export** – This method can take a long time for larger systems; it is therefore suitable only for smaller sites. The export may take two hours and the import 20 hours on a site with 1 million bibliographic records. It is also possible to exclude from the import Oracle tables that take a long time to export/import (Z97 and Z98), and instead run p_manage_01 to build these tables. p_manage_01 should be run after the Upgrade Express. The installation

team will be able to create the same number of user tablespaces on the target as you have on the source installation. The import and export is performed using the Oracle export and import utility. For performing import/export using this utility, see the appendix of this document.

- **Cloning the Database** – A database with 10,000,000 bibliographic records takes about 5 hours to copy using the cloning database method. (Contact your local Ex Libris representative for complete instructions on cloning a database.)

For both Option 1 and Option 2, the upgrade requires some additional disk space. During the upgrade of Oracle tables, the processed table is renamed for backup, in case the upgrade fails. This means that in the target installation, you need additional space in each tablespace. The additional space should be at least twice the size of the largest table/index in the tablespace.

2.3.Prerequisites

Installing the Target Version (19.01)

The first step in the actual upgrade process is the preparation of the target environment. The hardware and operating system requirements for 19.01 and the size of the customer's database must be taken into account. The installation is scheduled with the local Ex Libris representative, and you may be required to complete the *Request for Installation* form.

Note: When upgrading from a lower version than 18, the database needs to be upgraded to Oracle 10, as explained in the *Upgrade Express 17.01 to 18.01 User Guide*.

Note: In order to estimate the size of exported data, you can use the "expdp" utility with the "ESTIMATE_ONLY=y" flag, as follows:

```
expdp $ALEPH_ADMIN ESTIMATE_ONLY=y full=y
```

The result is in the following format:

```
Total estimation using BLOCKS method: 4.403 GB
```

```
Job "ALEPH_ADMIN"."SYS_EXPORT_FULL_01" successfully completed at  
16:50:41
```

Downloading the Upgrade Express Package

The Upgrade Express Package should be downloaded either to the source or target environment, depending on the Upgrade Express Method you choose to use. The standard Upgrade Express method involves downloading the Upgrade Express Kit to the target environment and following the instructions in section 3 "How to use the Upgrade Express Kit". The advanced Upgrade Express method involves downloading the Upgrade Express Kit to the source environment and following the instructions in Appendix 1. Skip to Appendix 1 if using the advanced method.

Download the Upgrade Express package to the target (19.01) environment. The Upgrade Express package is available for download from the FTP server. The

package is a .tar file that can be extracted anywhere, but it is recommended that you extract it to \$ALEPH_MOUNT, as follows:

```
ftp ftp.exlibris.co.il
```

```
Ver19up/<password to be obtained from a local representative>
```

```
bin
```

```
get <filename>
```

For example:

```
get upgrade_express_1801_1901.tar.1.01.gz
```

To open the kit:

```
>>gzip -d <filename>
```

For example:

```
gzip -d upgrade_express_1801_1901.tar.1.01.gz
```

```
>>tar -xf <filename>
```

3. How to Use the Upgrade Express Kit

This section is divided into two subsections. The first subsection presents a generalized list of the actions that can be done using the Upgrade Express Kit. The second subsection returns to this list and details the conditions and procedures for each step in the upgrade process.

3.1.How to Use the Upgrade Express Kit – General

The following is a list of the actions that can be performed using the Upgrade Express Kit:

- Pack library data and configuration tables.
- Transfer library data and configuration tables to the target server.
- Load library data and configuration tables into v.19. Perform the minimal required manual changes to the selected configuration files, such as updates to \$alephe_root/aleph_start, in order to allow basic functions such as login.
- Copy the Apache directory from the **utree** provided with the target version (19.01) to the new **utree** brought from the source version (see [Copying Apache](#)).
- Backup Oracle tables to be upgraded (optional) (see [Backing Up Oracle Tables](#)).
- Run the Upgrade Express (see [Running the Upgrade Express](#)).
- Check the upgrade results (logs, functionality, and so on) (see [Analyzing the Upgrade Express Results](#)).
- Implement changes described in the implementation notes (see [Implementation Notes](#)).

- Perform standard final actions (such as `clear_vir`, repackaging of the cataloging tables, and so on) (see [Packaging and Final Steps](#)).

3.2.How to Use the Upgrade Express Kit – Detailed Explanation

The following is a detailed description of the steps that can be performed using the Upgrade Express Kit. If you are running two upgrade packages (such as when upgrading from 17 to 19), it is recommended that you run the standard final actions (such as UTIL I/6 and others described under the [Packaging and Final Steps](#) section) only after running the last upgrade (in our example, only after running the upgrade from 18 to 19).

Pack Library Data and Configuration Tables

Make sure that ALEPH is down on the target version (run `$alephe_root/aleph_shutdown`). Copy the complete **utree** from the source (18.01) to the target (19.01). Use the `tar` command in order to copy the tree. This is necessary in order to copy the symbolic links correctly.

Note that the **utree** delivered with the target installation (19.01) by Ex Libris must be backed up. Some steps in the upgrade process make use of files in this tree.

It is recommended that you clean the copied **utree** as much as possible. Remove all unnecessary files from all directories (such as `scratch`, `files`, `print`, and so on).

Example of the commands that can be used:

```
cd /exlibris/aleph/
Backup u19_1 tree: mv u19_1/ u19_1.orig/
Tar u18_1 tree: tar -cf u18_1.tar u18_1/
Move u18_1 to u19_1: mv u18_1/ u19_1/
Restore u18_1 tree: tar -xvf u18_1.tar
```

Note that copying the utree can be performed using the Upgrade Express utility. For details, see the appendix of this document.

Performing the Minimally Required Manual Changes

To enable login to the new version, perform the following minimal changes:

1. Add the following line to the `./alephe/tab/tab_version` file:

```
19.01 ALEPH Y 0
```
2. Add valid `./alephe/tab/license` and `alephe/tab/license.www_x` files. Either copy the licenses if they have been supplied by Ex Libris, or copy the license files from the `u19_1.orig/alephe/tab` directory.
3. Restore the `aleph_startup` and `aleph_shutdown` files supplied with the version. (They are found in `u19_1.orig/alephe`.)
4. Synchronize the new `/alephe/aleph_start` file with the `aleph_start` file supplied with the target installation under the **utree** supplied with the version. It is recommended to merge the files by taking the file supplied with the installation and adding local specifications into the new file.

5. Refer to the [Manual Changes: Store and Restore](#) section. This section describes how to save modified files so that potential subsequent upgrade runs do not override them.
6. Log into version 19 and test `aleph_startup` and `aleph_shutdown`. Make sure that the correct version has been shut down and started up.

Note that several of the steps above can be performed automatically using the Upgrade Express utility. For more information, see Appendix 1 of this document.

Copying Apache

In order to have a functional Apache configuration, you must copy the Apache directory supplied with the version (under the backed up **utree**) to the new **utree** that is to be upgraded. Copy the directory by using the `tar` command to preserve the links. Avoid copying the links as directories. Note that the links might point to locations that do not exist. In this case, it will be necessary to recreate the links.

To locate the `tar` Apache directory in the original `u19_1/ tree`:

```
cd /exlibris/aleph/u19_1.orig/alephe
tar -cf apache.tar apache/
```

Move `apache.tar` to the "real" ver 19 tree:

```
mv apache.tar /exlibris/aleph/u19_1/alephe
cd /exlibris/aleph/u19_1/alephe
```

“Untar” using the following command:

```
tar -xvf apache.tar
```

After copying the Apache directory, perform the following:

1. If necessary, add any local configuration (such as local files) that was a part of your previous Apache configuration.
2. Clean up the `logs` directory (`./alephe/apache/logs`) by removing all files (`rm *`).
3. Recreate the Apache links by running the following command from the `apm` directory (get to this directory by typing `apm` at the command line):

```
createhtdocs_links
```
4. Restart the Apache server.

All the steps above are performed automatically when using the Upgrade Express utility. For more information, see the appendix of this document.

Importing Demo Libraries

This section is only relevant for the cloned database. At this point, the data of the demo libraries is also in the format of the source database (18.01). To replace this data with the demo data supplied by the installation, run the following command from the `ap` directory (To get to this directory, type `ap` at the command line):

oracle_imp_demo_libs

Note that this process can take up to several hours, depending on the capacity of the server.

Configuring Upgrade Express

To configure the initial upgrade, perform the following steps:

1. Log in to version 19.01.
2. Go to the `upgrade_express_1801_1901` directory by entering the following:
`cd $ALEPH_MOUNT/upgrade_express_1801_1901`
3. Open the Upgrade Express menu by entering the following command:
`source ./upgrade_util.`

The following menu appears:

```
+-----+
| Upgrade Express Utility 18.01 -> 19.01 Version 1.01 Target |
+-----+

0. Exit
1. View/Update upgrade parameters
2. Check environment
3. Run upgrade express
4. Perform Post Upgrade Express Actions
5. View logfiles

6. Backup/Restore Oracle Tables to be Upgraded
7. Store/Restore configuration files
9. Transfer data / configuration files to another server
```

4. From the Upgrade Express menu, select the first option, **Define Upgrade Parameters**.
5. Select **View Current Parameters**. This option displays a default set of parameters:
 - The following libraries are not in demo and they will be processed
 - Course libraries and their corresponding ADM libraries
 - Notification email address
 - Current languages

The defaults can be overridden if necessary. Selecting the **Update Parameters** option from the **Define Upgrade Parameters** submenu enables you to override the default options and update the above parameters. Note that defining or updating the parameters without using the utility may cause problems when running the Upgrade

Express. The proper way to define or update the upgrade parameters is by using the utility.

Backing Up Oracle Tables

You can back up the tables that are modified by the Upgrade Express. Although this step is optional, it is recommended. Perform the backup as follows:

1. Open the Upgrade Express menu as explained in the previous step.
2. Select **Backup/Restore Oracle Tables to be Upgraded**. The following choices are displayed:
 - Backup
 - Restore
 - List all backed up tables

The **Backup** option enables you to create a backup of the tables that are modified by the upgrade. If you select this option, you are prompted to supply a directory for export and the table name of the tables to be backed up. (ALL can be used for all tables involved in the upgrade.)

If you supplied an e-mail address when defining parameters, a notification e-mail message will be sent when the export is complete.

The following Oracle tables are modified by the 18.01 – 19.01 Upgrade Express process: Z66 Z67 Z13U Z13 Z37 Z31 Z77 Z70 Z403 Z73 Z30 Z108 Z107 Z52 Z61 Z410 Z00(COURSE) Z416 (Z108, Z107 were moved to ADM library).

Note that Z00 should be backed up only in the CRS libraries, since there was no change in the structure of this table.

The following new Oracle tables are added by the 18.01 – 19.01 Upgrade Express process: Z100, Z00p, Z07p, and Z13U (Z127 and Z120 were created in CRS libraries).

The **List all backed up tables** option enables you to view the list of tables that you have backed up.

The **Restore** option enables you to restore the backed up Oracle tables if something went wrong with the upgrade. As with the **Backup** option, you are prompted to supply the directory of the exported files to be imported and the table name of the tables to be imported. (ALL can be used for all tables involved in the upgrade.)

If you supplied an e-mail address at the parameter stage, a notification e-mail message will be sent when the restoration has been completed.

Upgrade Express Localization

Note: For most customers this section is not relevant.

The Upgrade Express supports multi-language environments. The localization process includes the translation of the Upgrade Express to other languages other than English.

This translation is usually performed by distributors / offices and does not require customer involvement.

The Upgrade Express can be translated into one or more different languages during the same upgrade. While running, each language-related step will be performed for each defined language. The languages are defined during the configuration stage. Each language has a separate directory under `upgrade_express_1801_1901/conf` in which all language-related steps are configured. New languages must be added to this location by copying the original `eng` directory and translating all files within this directory.

Non-language-related configuration files (there are usually only a few of these) are located in the `upgrade_express_1801_1901/conf/general` directory.

Running the Upgrade Express

All previous steps can be considered prerequisites for the Upgrade Express process. To run the upgrade, open the Upgrade Express menu and select the **Run Upgrade Express** option.

```
Running the Upgrade Express
-----

Upgrade Express runs in the background. At the end of the process you
will get an email to the address specified in the parameters.

0. Exit
1. Run all steps
2. Run a specific step
3. Run all steps >999 (Oracle data only)

Please select [0]:
```

The upgrade program runs a number of steps that include conversion of data and setup. Every step is listed in a log file that explains what action is included in the step and whether the step was successful.

The **Run Upgrade Express** option enables you to run a single step, the complete set of steps, or the Oracle data steps only. It is highly recommended that you run the complete set of steps the first time around. The option to run a single step should only be used if you find that a particular step failed and you do not want to rerun the entire process. The option to run all steps > 999 should be used to upgrade the Oracle data but not the configuration tables.

The upgrade program may take several hours to run, depending on the size of the database and server resources.

Note that while the upgrade is running, all menu options are disabled in order to avoid conflicts that may arise as a result of actions performed during this time (for example, if you change the initial parameters while the upgrade is running).

If you supplied an e-mail address during the parameter stage, a notification e-mail message will be sent as soon as the upgrade is complete.

Analyzing the Upgrade Express Results

As explained above, the Upgrade Express includes a number of steps and tasks. After running the upgrade, a log file for each of the steps is created in the log directory located under `upgrade_express_1801_1901`. Each task performed has been assigned a numeric identifier and the log file appears in the directory according to the following convention:

`[step_number].log` (for example, `198.log`)

The log files contain a description of each task performed as well as information pertaining to the success or failure of each task.

As soon as the Upgrade Express concludes, you should analyze these log files in order to detect whether problems occurred. In the event of failed steps, you may need to perform certain tasks manually, or rerun steps after making certain changes.

You can view the log file by selecting **View Log Files** from the Upgrade Express menu. This option enables you to view the main log file or the log file for a single step. In addition, you can view the log files of previous upgrade runs.

```
View Log Files
-----

0. Exit
1. View Main Log
2. View a Specific Step Log
3. View Older Logs

Please select [0]:
```

Examples:

1. A step adds a new form to the `form_eng` directory of the administrative library. While running the upgrade, the program detects that the file already exists in the target **utree**. In this case, the step's log file states that the file was not added. The user must then decide whether to keep the original file, or manually copy the new file..
2. A step adds changes to a form in the `form_eng` directory. Based on the Upgrade Express methodology, changes to the `form_eng` files are added only if the target file is identical to the source installation (18.01)'s demo file. If the files differ, the step's log file contains a message informing the user that the changes could not be made and that they should be implemented manually.

The [Step Descriptions](#) chapter contains a detailed description of the configuration changes performed by the upgrade kit. If you come across an error message "The file can not be upgraded automatically. Merge manually!", the [Step Descriptions](#) chapter 1 indicates the change that was introduced to a particular file in v.19.

For information on how to save modified files so that potential subsequent upgrade runs do not override these files, see the [Manual Changes: Store and Restore](#) section.

Implementation Notes

In addition to failed steps, which need to be handled manually, there are a number of configuration files (mainly HTML files) that require manual upgrading. A list of the

changes required to these files is included in the [OPAC Implementation Notes](#) chapter.

Packaging and Final Steps

The final step of the upgrade includes a set of standard actions. These actions can be performed by selecting **Perform Post Upgrade Express Actions** from the Upgrade Express.

```
Perform Post Upgrade Express Actions
-----
0. Exit
1. Remove UTF files (util-x-7)
2. Clear VIR sessions (util-x-8)
3. Repack Cataloging tables (util-m-7)
4. Create Print Templates Package for the PC Client (util-i-6)

6. Organize pcb files
7. Organize error files
```

The following actions should be performed:

- Remove the UTF files.
- Clear the VIR sessions.
- Repack the cataloging tables (UTIL M/7).
- Create a Print Templates Package for the PC Client (UTIL I/6).
- Run Util H/2 and Util H/3 to synchronize headers. (Although this step is not in the menu above, it is recommended).

After these steps are completed, restart the servers and run the UE processes. The system should then be operational.

Note: When upgrading two separate packages, you should restart the server and run the UE processes only after the second package upgrade. For example, if you are upgrading from 17.01 to 18.01 and then from 18.01 to 19.01, the **Post Upgrade Express Actions** should be run only after the second upgrade has been performed.

4. Guidelines for the Upgrade Methodology

4.1.Manual Changes: Store and Restore

All configuration files that are modified during the Upgrade Express process must be saved in a separate location; otherwise, subsequent upgrade runs will override them. The Upgrade Express package has a mechanism for storing files that have been modified during the process. Each time a file is modified, ensure that you run **D. Online Store/Restore Utilities**.

```
D. Online Store/Restore Utilities
0. Exit Procedure
```

- | |
|---|
| <ol style="list-style-type: none">1. Store Library Data2. Store Library Configuration3. Restore Library Data4. Restore Library Configuration |
|---|

All saved files can be restored after a subsequent run of the Upgrade Express.

4.2. What Is Not Included in Upgrade Express

The Upgrade Express upgrades the customer's ALEPH system with the aim of maintaining the current setup and functionality. Do not implement new functionality, as this will interfere with the upgrade itself. New functionality should be implemented after the switch to production with the new version. The Upgrade Express does not include automatic setup for implementing new and enhanced functionality, unless it must be implemented to maintain the current functionality. The Upgrade Express from 18.01 to 19.01 will not add new setup files or make changes in setup files unless these changes are mandatory.

4.3. Cleanup Utilities

Due to architectural changes in ALEPH, and for clarity and upgrade purposes, version 17.01 `pc_b_[lng]` and `error_[lng]` directories are located in the `aleph` directory, which means that they are part of the installation of the product. However, the customer can still configure these files within the `alephe` directory, as in previous versions of ALEPH. To avoid duplication and possible misunderstandings, you should clean up these files in `alephe`. The Upgrade Express includes two utilities that can help you clean up the `pc_b_[lng]` and `error_[lng]` directories.

pc_b_[lng] File Cleanup Utility

This utility is available from the main menu of the Upgrade Express:

6. Organize pcb files

It compares the `./aleph/pc_b_[lng]` directory to the customer's `./alephe/pc_b_[lng]` directory. A report, which includes the detailed current situation of the directory and advice regarding the action that should be taken, is provided.

For example, the following may be provided:

- Similar files in the two compared directories can be deleted from `./alephe/pc_b_[lng]`.
- Files with differences may be customized and should remain under `alephe`.
- Files that appear only under `./alephe/pc_b_[lng]` and not under `./aleph/pc_b_[lng]` are not in use anymore by ALEPH and can be deleted.

The **Delete Obsolete Files** menu option deletes all files with a file name identical to the updated file from `./alephe/pc_b_[lng]`.

error_[lng] File Cleanup Utility

This utility is available from the main menu of the Upgrade Express:

7. Organize error files

It compares the `./aleph/error_[lng]` and `./alephe/error_[lng]` directories. A report, which includes the detailed current situation of the directory and advice regarding the action that should be taken, is provided.

For example, the following may be provided

- Similar files in the two compared directories can be deleted from `./alephe/error_[lng]`.
- If files differ in one or more error message lines, the files should be merged.

The **Delete Similar Files** menu option deletes all files that have the same name as the new file. The merge actions should be performed manually by the customer.

5. Installing the New GUI

The 19.01 GUI installation program includes the option of upgrading your current GUI. This means that setup parameters (*.ini files) from your older version clients will be copied to the new 19.01 clients and synchronized, minimizing the need to customize the new GUI. To apply the upgrade program, you must install the new GUI in the same directory in which the older version GUI is installed. The old GUI version is automatically saved under the same directory (for example Acq.sav). Install the new GUI in the original or copied directory.

At the end of the installation of the 19.01 GUI, the setup program checks the previous GUI version and prompts you to confirm whether you want to run the upgrade program. The upgrade program will synchronize the 19.01 installation with special changes (for example, formats and names changes) that were done in previous versions.

Note that in v.19 there is only one application, the new integrated ILL. Therefore, the installation synchronizes the new integrated ILL in v.18 (ILL2) or the old ILL (if the ILL2 does not exist) with ILL in v.19.

6. Step Descriptions

6.1.Changes in Configuration Files

This includes steps 1 – 999. The changes are performed in the relevant configuration tables.

The description relates to the following libraries:

adm_libs	Administrative libraries
bib_libs	Bibliographic libraries
hol_libs	Holding libraries

union_catalog_libs	Union Catalog
crs_libs	Course reading libraries
ill_libs	ILL libraries
pw_libs	password libraries

Changes in Oracle tables relate to steps that are greater than 999. The changes are performed in the ORACLE database.

6.2. Changes in Configuration Tables

Step 1

Added the following new file:

./[adm_libs]/form_{lng}/auto-aleph-report-00.xsl

Step 2

1. Changed the following line in ./[adm_libs]/tab/pc_tab_exp_field.{lng} from:

	SERIAL-SEARCH	L ISSN	ISSN
To:	SERIAL-SEARCH	L ISSN	BIB-ISSN

2. Added the following new lines to the

./[adm_libs]/tab/pc_tab_exp_field.lng file:

PATRON GENDER	L Male	M
PATRON-GENDER	L Female	F
MULTI_ORDER_STATUS	L Sent to vendor	SV
MULTI_ORDER_STATUS	L Ready to send to vendor	RSV
INV-SORT-TYPE	L Vendor/Invoice Number (Ascending)	INV-1-A
INV-SORT-TYPE	L Vendor/Invoice Number (Descending)	INV-1-D
INV-SORT-TYPE	L Date Range (Ascending)	INV-2-A
INV-SORT-TYPE	L Date Range (Descending)	INV-2-D
INV-SORT-TYPE	L Invoice Type (Ascending)	NV-3-A
INV-SORT-TYPE	L Invoice Type(Descending)	INV-3-D
INV-SORT-TYPE	L Related Budget (Ascending)	INV-4-A
INV-SORT-TYPE	L Related Budget (Descending)	INV-4-D
INV-SORT-TYPE	L Invoice Line Note (Ascending)	INV-5-A
INV-SORT-TYPE	L Invoice Line Note (Descending)	INV-5-D
INV-SORT-TYPE	L Invoice Number (Ascending)	INV-6-A
INV-SORT-TYPE	L Invoice Number (Descending)	INV-6-D

(The Gender field is filled whenever creating/updating a patron.)

Step 3

Added the new files:

./[adm_libs]/pc_display_{lng}/vendor-expanded-information

./[adm_libs]/pc_display_{lng}/vendor-expanded-information.trn

Step 4

Added the following line to ./[adm_libs]/tab/pc_tab_col.lng:

PC_SERIAL_GROUPS L Issue date 05 000 01 C01

Step 6

1. Removed the following lines from the. ./[adm_libs]/tab/pc_tab_col.lng and
./[bib_libs]/tab/pc_tab_col.lng files :

ADMIN_PASSWORD_LIST L User Name 01 032 01 C01 User Name
ADMIN_PASSWORD_LIST L Permitted libraries 02 068 01 C01 Permitted libraries
ADMIN_PROXY_LIST L User Name 01 100 01 C01 User Name
ADMIN_PROXY_LIST L Permitted libraries 02 000 01 C01 Permitted libraries

2. Added the following lines to the. ./[adm_libs]/tab/pc_tab_col.lng and
./[bib_libs]/tab/pc_tab_col.lng files :

ADMIN_PASSWORD_LIST L User ID 01 032 01 C01 User ID
ADMIN_PASSWORD_LIST L Name 02 000 01 C01 Name
ADMIN_PASSWORD_LIST L Department 03 000 01 C01 Department
ADMIN_PASSWORD_LIST L Expiry Date 04 000 01 C01 Expiry Date
ADMIN_PASSWORD_LIST L Permitted libraries 05 068 01 C01 Permitted libraries
ADMIN_PROXY_LIST L User Name 01 100 01 C01 User Name
ADMIN_PROXY_LIST L Name 02 000 01 C01 Name

ADMIN_PROXY_LIST	L Department	03 000 01 C01	Department
ADMIN_PROXY_LIST	L Expiry Date	04 000 01 C01	Expiry Date
ADMIN_PROXY_LIST	L Permitted libraries	05 000 01 C01	Permitted libraries

PC_COM_JOB_LOG_LIST	L Job ID	01 000 01 C01	Z100-REC-KEY
PC_COM_JOB_LOG_LIST	L Proc name	02 015 01 C01	Z100-PROC-NAME
PC_COM_JOB_LOG_LIST	L Library	03 015 01 C01	Z100-LIBRARY
PC_COM_JOB_LOG_LIST	L Start time	04 015 01 C01	Z100-START-DATE&TIME
PC_COM_JOB_LOG_LIST	L End time	05 005 01 C01	Z100-END-DATE&TIME
PC_COM_JOB_LOG_LIST	L Parameters	06 005 01 C01	Z100-JOB-PARAMS
PC_COM_JOB_LOG_LIST	L Status	07 005 01 C01	Z100-STATUS
PC_COM_JOB_LOG_LIST	L Log file	08 005 01 C01	Z100-LOG-FILE
PC_COM_JOB_LOG_LIST	L Job type	09 005 01 C01	Z100-JOB-TYPE
PC_COM_JOB_LOG_LIST	L Print-id	10 005 01 C01	Z100-PRINT-ID
PC_COM_JOB_LOG_LIST	L User	11 005 01 C01	Z100-USER
PC_COM_JOB_LOG_LIST	L Process-id	12 005 01 C01	Z100-PID
PC_COM_JOB_LOG_LIST	L Alert	13 005 01 C01	Z100-ALERT

Step 7

Added the following new files:

```
./alephe/www_c_{lng}/c-bor-new-body
./alephe/www_c_{lng}/c-bor-new-head
./alephe/www_c_{lng}/c-bor-new-tail
./alephe/www_c_{lng}/c-profile-new
```

Step 8

Updated the following file:

```
./[bib_libs]/form_{lng}/print-bibliography.xsl
```

Replaced:

```
<xsl:call-template name="bib-info-free">
  <xsl:with-param name="value" select="node()"/>
</xsl:call-template>
```

With:

```
<xsl:call-template name="bib-info">
```

<xsl:with-param name="line" select="node()"/>

Step 9

Replaced the following line in /alephe/gate/loc.conf:

Z58-IN-RECORD-CHAR-CONV

with:

Z58-IN-RECORD-CHAR-CONV MARC8_TO_UTF

Step 10

1. Added the following new line to the ./[adm_libs]/form_{lng}/global.trn file:

z66-expiry-date DATE S

2. Added the new files:

./[adm_libs]/form_{lng}/staff-privileges.xml

./[adm_libs]/form_{lng}/staff-privileges.trn

./[adm_libs]/form_{lng}/staff-users.xml

3. Added the following new lines to

./[adm_libs]/form_{lng}/translate_readme.txt:

USER-FUNC

translates the z67-func and z67-sub-func according to

\$alephe_tab/user_function.lng

use z67-func and z67-sub-func as input parameters

Step 11

1. Added the new files:

./[adm_libs]/pc_display_{lng}/patron-details

./[adm_libs]/pc_display_{lng}/patron-details.trn

./[adm_libs]/pc_display_{lng}/user-details.trn

2. Added lines (a new section) to ./[adm_libs]/pc_display_{lng}/user-details .

Step 12

Updated the files ./[adm_libs]/form_{lng}/return-receipt.xml and loan-reciept.xml by replacing the following line:

<xsl:call-template name="table-open"/>

With:

<xsl:call-template name="table-close"/>

Step 13

Added the new file:

./[adm_libs]/form_{lng}/commitment-report.xml

Step 14

Updated the file ./[adm_libs]/form_{lng}/cash-site-payment.xml:

Added the following line:

<xsl:call-template name="table-close"/>

Step 15

Updated the file ./[ill_libs]/form_{lng}/plain-funcs.xml.

Deleted the following line:

<xsl:include href="funcs-address.xml"/>

Step 16

Added a new column to tab18.lng named "Item Status" in order to make tab18.lng item-sensitive.

The column position is 3 and it contains 2 characters. The default value for this new column is "##". Columns 3-8 will be moved to 4-9.

Step 17

1. Added the following new file:

./alephe/www_x_{lng}/user-auth.tag

2. Added the following lines to the file ./alephe/www_x_{lng}/global.trn :

z66-open-date	DATE	S
z66-update-date	DATE	S
z66-expiry-date	DATE	S
z66-last-alert-date	DATE	S
z66-last-login-date	DATE	S

Step 19

Updated the following files:

1. Added the following line to

./[adm_libs]/form_{lng}/acq-m-order-info.xsl
./[adm_libs]/form_{lng}/adam-07-usage-report.xsl
./[adm_libs]/form_{lng}/acq-s-order-info.xsl
./[adm_libs]/form_{lng}/budget-details.xsl
./[adm_libs]/form_{lng}/budget-statuses-hierarchy.xsl
./[adm_libs]/form_{lng}/cash-summary.xsl
./[adm_libs]/form_{lng}/claimed-returned-items-report.xsl
./[adm_libs]/form_{lng}/invoice-report-summary.xsl
./[adm_libs]/form_{lng}/overdue-sum-single-0.xsl
./[adm_libs]/form_{lng}/overdue-sum-single-1.xsl

```

./[adm_libs]/form_{lng}/overdue-sum-single-2.xsl
./[adm_libs]/form_{lng}/overdue-sum-single-3.xsl
./[adm_libs]/form_{lng}/overdue-sum-single.xsl
./[adm_libs]/form_{lng}/returned-lost-items-summary-01.xsl
./[adm_libs]/form_{lng}/returned-lost-items-summary.xsl
./[adm_libs]/form_{lng}/bor-list-renew-all.xsl:

```

```

<xsl:call-template name="table-close"/>

```

2. Added the following lines at the end of section 2 of ./[adm_libs]/form_{lng}/alphabetize-headings.xsl:

```

<xsl:if test="position() = last()">
  <xsl:call-template name="table-close"/>
</xsl:if>

```

3. Added the following lines to ./[adm_libs]/form_{lng}/invoice-report-summary.xsl:

```

<xsl:with-param name="label" select="External Name"/>
<xsl:with-param name="value" select="./z76-external-budget"/>
<xsl:with-param name="header" select="$header"/>
</xsl:call-template>
<xsl:call-template name="display-grid-gen">

```

4. Replaced the following line in ./[adm_libs]/form_{lng}/plain-funcs-bib-info.xsl:

```

<xsl:if test="$rest = " and $line != " and $line != '###'">

```

With:

```

<xsl:if test="$rest = " and $line != " and $line != '##' and not(contains($line, '##'))">

```

5. Replaced the following line in ./[adm_libs]/form_{lng}/plain-funcs-grid.xsl:

```

<xsl:call-template name="bib-info-hdr">

```

With:

```

<xsl:call-template name="bib-info">

```

Added the line:

```

<xsl:with-param name="label" select='concat($label,": ")'/>

```

```

*****
*****

```


Step 20

Added a new column to \$alephe/error_eng/pc_messages. The addition of column 4 “Display the message [Y]/N” is for choosing rather this message will or will not be displayed.

The original column 4 has been moved to column 5 and the new column 4 has been set with default value “Y”.

```
*****
*****
```

Step 21

1. Added a new icon file ./alephe/www_f_eng/icon/f-renew.gif.

2. Added a new line to \$alephe_root/www_server.conf and \$alephe_root/www_server.conf.tml to enable the use of the new icon:

```
setenv www_f_renew      "<img src=&icon_path/f-renew.gif border=0 alt='Renew'>"
```

```
*****
*****
```

Step 22

Removed P-FROM-DATE and P-TO-DATE from the p_acq_11 parameters in the job list.

Updated the job-list for p-acq-11 by changing the following line:

LIB_CODE,X1,X2,X3,X4,X5,X6

to:

LIB_CODE,X1,X2,X3,X6

```
*****
*****
```

Step 23

1. Added the new files:

./[adm_libs]/form_{lng}/bor-booking-list-00

./[adm_libs]/form_{lng}/bor-hold-list-00

2. Added new files:

./alephe/www_f_{lng}/bor-include-3

./alephe/www_f_{lng}/bor-include-4

./alephe/www_f_{lng}/user-info-mail

Step 24

Added a new column (No. 28) to ./[adm_libs]/tab/tab16. This column "Item requested threshold" sets a minimum number of hold-requests. Only above this threshold will the "requested due-date" be used. The new column has a numeric value of 2 digits and it is added with a default value 01 .

Step 25

Added the following lines to ./[adm_libs]/tab/pc_tab_col.lng, in order to show groups of serial's items by Vendor:

PC_SERIAL_GROUPS_ONV L No. Items.	01 010 01 C01
PC_SERIAL_GROUPS_ONV L Arrived	02 010 01 C01
PC_SERIAL_GROUPS_ONV L Expected	03 010 01 C01
PC_SERIAL_GROUPS_ONV L Desc.	04 040 01 C01
PC_SERIAL_GROUPS_ONV L Vendor	05 030 01 C01

Step 26

Added the new files:

./[adm_libs]/form_{lng}/bor-cash-list-00
./[adm_libs]/form_{lng}/bor-history-loan-list-00
./[adm_libs]/form_{lng}/bor-loan-list-00
./[adm_libs]/form_{lng}/bor-photo-list-00
./[adm_libs]/form_{lng}/bor-title-list-00

Step 27

1. Added the following new files:

./alephe/www_f_{lng}/message-page
./alephe/www_f_{lng}/new-ill-req-conf-bib

./alephe/www_f_{lng}/new-ill-req-conf-bib-1
./alephe/www_f_{lng}/new-ill-req-conf-bib-2
./alephe/www_f_{lng}/new-ill-req-conf-cancel-tail
./alephe/www_f_{lng}/new-ill-req-conf-copyright
./alephe/www_f_{lng}/new-ill-req-conf-head
./alephe/www_f_{lng}/new-ill-req-conf-info
./alephe/www_f_{lng}/new-ill-req-conf-iss-i
./alephe/www_f_{lng}/new-ill-req-conf-iss-p
./alephe/www_f_{lng}/new-ill-req-conf-iss-v
./alephe/www_f_{lng}/new-ill-req-conf-iss-y
./alephe/www_f_{lng}/new-ill-req-conf-tail

2. Added the following new files:

./[ill_lib]/form_{lng}/global.trn
./[ill_lib]/form_{lng}/ill-answer-letter-2.xsl
./[ill_lib]/form_{lng}/ill-answer-letter-3.xsl
./[ill_lib]/form_{lng}/ill-answer-letter-5.xsl
./[ill_lib]/form_{lng}/ill-answer-letter-6.xsl
./[ill_lib]/form_{lng}/ill-bor-letter-c.xsl
./[ill_lib]/form_{lng}/ill-bor-letter-d.xsl
./[ill_lib]/form_{lng}/ill-bor-letter-l.xsl
./[ill_lib]/form_{lng}/ill-bor-letter-m.xsl
./[ill_lib]/form_{lng}/ill-bor-letter-r.xsl
./[ill_lib]/form_{lng}/ill-bor-letter-x.xsl
./[ill_lib]/form_{lng}/ill-check-in-letter.xsl
./[ill_lib]/form_{lng}/ill-hold-shelf-list.xsl
./[ill_lib]/form_{lng}/ill-lend-letter-a.xsl
./[ill_lib]/form_{lng}/ill-lend-letter-m.xsl
./[ill_lib]/form_{lng}/ill-lend-letter-m.xsl
./[ill_lib]/form_{lng}/ill-lend-letter-o.xsl
./[ill_lib]/form_{lng}/ill-lend-letter-r.xsl
./[ill_lib]/form_{lng}/ill-lend-supply-letter.xsl
./[ill_lib]/form_{lng}/ill-lend-supply-slip.xsl
./[ill_lib]/form_{lng}/ill-patron-letter-0.xsl

./[ill_lib]/form_{lng}/ill-patron-letter-2.trn
./[ill_lib]/form_{lng}/ill-patron-letter-2.xsl
./[ill_lib]/form_{lng}/ill-patron-letter-3.trn
./[ill_lib]/form_{lng}/ill-patron-letter-3.xsl
./[ill_lib]/form_{lng}/ill-patron-letter-4.trn
./[ill_lib]/form_{lng}/ill-patron-letter-4.xsl
./[ill_lib]/form_{lng}/ill-patron-letter-5.trn
./[ill_lib]/form_{lng}/ill-patron-letter-5.xsl
./[ill_lib]/form_{lng}/ill-patron-letter-6.xsl
./[ill_lib]/form_{lng}/ill-patron-letter-a.trn
./[ill_lib]/form_{lng}/ill-patron-letter-a.xsl
./[ill_lib]/form_{lng}/ill-patron-letter-c.trn
./[ill_lib]/form_{lng}/ill-patron-letter-c.xsl
./[ill_lib]/form_{lng}/ill-patron-letter-i.trn
./[ill_lib]/form_{lng}/ill-patron-letter-i.xsl
./[ill_lib]/form_{lng}/ill-patron-letter.trn
./[ill_lib]/form_{lng}/ill-print-bldsc-c-cf-00
./[ill_lib]/form_{lng}/ill-print-bldsc-c-mn-00
./[ill_lib]/form_{lng}/ill-print-bldsc-c-other-00
./[ill_lib]/form_{lng}/ill-print-bldsc-c-se-00
./[ill_lib]/form_{lng}/ill-print-bldsc-l-cf-00
./[ill_lib]/form_{lng}/ill-print-bldsc-l-mn-00
./[ill_lib]/form_{lng}/ill-print-bldsc-l-se-00
./[ill_lib]/form_{lng}/ill-return-letter.xsl
./[ill_lib]/form_{lng}/new-requests-status-report.xsl
./[ill_lib]/form_{lng}/outstanding-req-of-former-bor.xsl
./[ill_lib]/form_{lng}/plain-funcs-address.xsl
./[ill_lib]/form_{lng}/plain-funcs-address.xsl
./[ill_lib]/form_{lng}/plain-funcs-bib-info.xsl
./[ill_lib]/form_{lng}/plain-funcs-free.xsl
./[ill_lib]/form_{lng}/plain-funcs-grid.xsl
./[ill_lib]/form_{lng}/plain-funcs-misc.xsl
./[ill_lib]/form_{lng}/plain-funcs-right.xsl
./[ill_lib]/form_{lng}/plain-funcs-salut-sign.xsl
./[ill_lib]/form_{lng}/plain-funcs-split.xsl

```

./[ill_lib]/form_{lng}/plain-funcs-table.xsl
./[ill_lib]/form_{lng}/plain-funcs.xsl
./[ill_lib]/form_{lng}/ill-lend-requests-report.xsl
./[ill_lib]/form_{lng}/ill-lend-requests-report.trn
./[ill_lib]/form_{lng}/ill-65.xsl
./[ill_lib]/form_{lng}/ill-65.trn
./[ill_libs]/form_{lng}/ill-ship-electronic.xsl

```

3. Updated the following file./[ill_lib]/form_{lng}/funcs-address.xsl :

Replaced each

z700-vendor-address-x

With:

z700-gen-address-x

Immediately after the rows above added the following lines

```

<xsl:call-template name="table-start-row"/><td width="70%"><xsl:value-of select="/z700-gen-city"/></td><td></td><xsl:call-template name="table-end-row"/>
<xsl:call-template name="table-start-row"/><td width="70%"><xsl:value-of select="/z700-gen-state"/></td><td></td><xsl:call-template name="table-end-row"/>
<xsl:call-template name="table-start-row"/><td width="70%"><xsl:value-of select="/z700-gen-zip"/></td><td></td><xsl:call-template name="table-end-row"/>
<xsl:call-template name="table-start-row"/><td width="70%"><xsl:value-of select="/z700-gen-country"/></td><td></td><xsl:call-template name="table-end-row"/>
<xsl:call-template name="table-start-row"/><td width="70%"><xsl:value-of select="/z700-gen-email-address"/></td><td></td><xsl:call-template name="table-end-row"/>
<xsl:call-template name="table-start-row"/><td width="70%"><xsl:value-of select="/z700-gen-telephone"/></td><td></td><xsl:call-template name="table-end-row"/>

```

4. The following files were extremely changed. It is better to replace them with the demo files (in the a tree) and then modify the files with the library configuration.

```

./[ill_lib]/form_{lng}/ill-claim-letter.xsl
./[ill_lib]/form_{lng}/ill-arrival-slip-new.xsl

```

5. The content of the ./[ill_lib]/form_{lng}/ill-claim-letter.trn and ./[ill_lib]/form_{lng}/ill-claim-report.trn were moved to global.trn

6. Added the following lines to./[ill_lib]/form_{lng}/ill-claim-report.xsl

```

<!--section-01 (GRID)-->

```

```

<xsl:for-each select="//section-01">
  <xsl:call-template name="section-01"/>
</xsl:for-each>
<!--SECTION-01 (FREE)-->
<xsl:template name="section-01">
  <xsl:call-template name="table-open"/>
  <xsl:call-template name="display-gen">
    <xsl:with-param name="label" select="'ILL Unit:'"/>
    <xsl:with-param name="value" select="./ill-unit"/>
  </xsl:call-template>
  <xsl:call-template name="table-close"/>
</xsl:template>
*****
*****

```

Step 29

Added the following lines to ./[pw_libs]/tab/pc_tab_exp_field.lng:

STAFF-DEPARTMENT	L Test Department	234567890
STAFF-DEPARTMENT	L Physics	Physics
STAFF-DEPARTMENT	L Chemistry	Chemistry
STAFF-DEPARTMENT	L English	English
STAFF-DEPARTMENT	L Fine Arts	Finearts
STAFF-DEPARTMENT	L Anthropology	Anthropology
STAFF-DEPARTMENT	L Psychology	Psychology
STAFF-DEPARTMENT	L Other	Other

```

*****
*****

```

Step 30

1. Added the following new file:

./[adm_libs]/pc_display_{lng}/scan-job-expand

2. Added the following lines to ./[adm_libs]/pc_display_{lng}/global.trn :

scj-doc-number	INTEGER	S
scj-item-sequence	INTEGER	S

scj-sub-library	SUB-LIB	S
scj-object-type	PC-TAB-EXP	S OBJECT-TYPE
scj-object-colour	PC-TAB-EXP	S OBJECT-COLOUR
scj-object-resolution	PC-TAB-EXP	S OBJECT-RESOLUTION
scj-status	PC-TAB-EXP	S SCAN-JOB-STATUS
scj-open-date	DATE	S
scj-update-date	DATE	S

Step 31

Added the following new files:

```
./alephe/www_f_{lng}/floating-keyboard
./alephe/www_f_{lng}/floating-keyboard.js
./alephe/www_f_{lng}/floating-keyboard.xml
./alephe/www_f_{lng}/icon/bg_strip.gif
```

Step 32

Added the following new files:

```
./[adm_libs]/pc_display_{lng}/item-loan.trn
./[adm_libs]/pc_display_{lng}/user-loan.trn
```

Step 33

Added the following new file:

```
./alephe/www_f_{lng}/ill-message-page
./alephe/www_f_{lng}/abrs-maps
```

Step 34

1. Added the following new files:

```
./[ill_libs]/tab/edit_doc_999.{lng}
./[ill_libs]/pc_display_{lng}/apdu-info
./[ill_libs]/pc_display_{lng}/style-css
```

2. Added the following lines to ./[ill_libs]/tab/pc_tab_col.{lng} :

```
PC_ILL_APDU_LIST  L ILLSV Doc. No    01 010 01 C01    Request Number
PC_ILL_APDU_LIST  L Title            02 035 01 C01    Title
PC_ILL_APDU_LIST  L Author           03 020 01 C01    Author
PC_ILL_APDU_LIST  L APDU Type        04 015 01 C01    APDU Type
PC_ILL_APDU_LIST  L Service Date/Time 05 020 01 C01    Service Date
```

3. Added the following lines to ./[ill_libs]/tab/pc_tab_exp_field.{lng} :

```
APDU-STATUS      L Unsupported          UNS
APDU-STATUS      L Unrecognized        UNR
APDU-STATUS      L Mediated            MED
BOR-REQ-STATUS   L Daemon Sent Failed    DSF
*****
*****
```

Step 35

1. Replaced the following line in ./[ill_libs]/tab/pc_tab_exp_field.{lng}

```
ILL-DELIVERY-METHOD  L Email          EM
LEND-SORT-TYPE         L Title-Ascending  A-ATIT
LEND-SORT-TYPE         L Title-Descending  D-DTIT
BORROWING-SEARCH       L Words from Title (history)  BIB-HIST-WTI
LENDING-SEARCH         L Words from Title (history)  BIB-HIST-WTI
```

With:

```
ILL-DELIVERY-METHOD  L Email          E
LEND-SORT-TYPE         L Title-Ascending  A-TIT
LEND-SORT-TYPE         L Title-Descending  D-TIT
BORROWING-SEARCH       L Words from Title (history)  BIB-WHS
LENDING-SEARCH         L Words from Title (history)  BIB-WHS
```

2. Added the following lines to ./[ill_libs]/tab/pc_tab_exp_field.{lng}:

APDU-SORT-TYPE	L Doc. Number (Ascending)	A-DOC-NUM
APDU-SORT-TYPE	L Doc. Number (Descending)	D-DOC-NUM
APDU-SORT-TYPE	L Title (Ascending)	A-TITLE
APDU-SORT-TYPE	L Title (Descending)	D-TITLE
APDU-SORT-TYPE	L Author (Ascending)	A-AUTHOR
APDU-SORT-TYPE	L Author (Descending)	D-AUTHOR
APDU-SORT-TYPE	L Service Date (Ascending)	A-DATE
APDU-SORT-TYPE	L Service Date (Descending)	D-DATE

BORROWING-SEARCH	L Words from Title (history)	BIB-WHS
LENDING-SEARCH	L Words from Title (history)	BIB-WHS

Step 36

Added the following new file:

./[adm_libs]/form_{lng}/reserve-item-schedule.trn

Step 37

Added the following new files:

./[adm_libs]/form_{lng}/acq-claims-by-vendor.xsl

./[adm_libs]/form_{lng}/acq-claims-by-vendor.trn

./[adm_libs]/form_{lng}/cir-37-report.xsl

./[adm_libs]/form_{lng}/cir-37-report.trn

./[adm_libs]/form_{lng}/acq-invoice-update.xsl

./[adm_libs]/form_{lng}/acq-invoice-update.trn

./[adm_libs]/pc_display_{lng}/patron-summary

./[adm_libs]/pc_display_{lng}/patron-summary.trn

./[adm_libs]/form_{lng}/serial-expected-arrival.trn
./[adm_libs]/form_{lng}/serial-expected-arrival.xsl

Step 38

Added the following new files :

./alephe/www_f_{lng}/ill-alternate-unit-b
./alephe/www_f_{lng}/ill-alternate-unit-h
./alephe/www_f_{lng}/ill-alternate-unit-t
./alephe/www_f_{lng}/title-group-dropdown-menus-issue
./alephe/www_f_{lng}/title-group-dropdown-menus-month
./alephe/www_f_{lng}/title-group-dropdown-menus-tail
./alephe/www_f_{lng}/title-group-dropdown-menus-volume
./alephe/www_f_{lng}/title-group-dropdown-menus-year
./alephe/www_f_{lng}/title-request-form-no-pickup
./alephe/www_f_{lng}/booking-req-expand-head
./alephe/www_f_{lng}/bor-cash-exp-head
./alephe/www_f_{lng}/bor-history-loan-exp-head
./alephe/www_f_{lng}/bor-hold-exp-head
./alephe/www_f_{lng}/bor-loan-exp-head
./alephe/www_f_{lng}/bor-photo-exp-head
./alephe/www_f_{lng}/bor-title-exp-head
./alephe/www_f_{lng}/bor-acq-body
./alephe/www_f_{lng}/bor-acq-tail
./alephe/www_f_{lng}/bor-acq-no-acq
./alephe/www_f_{lng}/bor-acq-head
./alephe/www_f_{lng}/bor-acq-exp-data
./alephe/www_f_{lng}/bor-acq-exp-cancel
./alephe/www_f_{lng}/bor-acq-exp-back
./alephe/www_f_{lng}/acq-request-doc-tail-conf
./alephe/www_f_{lng}/acq-request-doc-tail
./alephe/www_f_{lng}/acq-request-doc-head-conf
./alephe/www_f_{lng}/acq-request-doc-head
./alephe/www_f_{lng}/acq-request-confirm

./alephe/www_f_{lng}/acq-request
./alephe/www_f_{lng}/login-acq-session
./alephe/www_f_{lng}/head-1-bor-ill
./alephe/www_f_{lng}/head-1-nobor-ill
./alephe/www_f_{lng}/head-replace-ill
./alephe/www_f_{lng}/head-1-bor-pds

Step 39

1. Added the following new files :

./[usr_lib]/form_{lng}/alert-batch-job-00
./[ill_lib]/form_{lng}/alert-batch-job-00
./[usr_lib]/form_{lng}/sys-90-jobs-report.xml
./[usr_lib]/form_{lng}/sys-90-jobs-report.trn
./[ill_lib]/form_{lng}/sys-90-jobs-report.xml
./[ill_lib]/form_{lng}/sys-90-jobs-report.trn
./[adm_libs]/pc_display_eng/job-details
./[adm_libs]/pc_display_eng/job-details.trn
./[ill_libs]/pc_display_eng/job-details
./[ill_libs]/pc_display_eng/job-details.trn
./[adm_lib]/form_{lng}/auto-return-letter.xml

2. Updated the following files:

./[course_libs]/form_{lng}/course-summary.xml
./[course_libs]/form_eng/course-inactive.trn
./[course_libs]/form_eng/course-inactive.xml
./[ill_libs]/form_eng/ill-print-bldsc-c-cf-00
./[ill_libs]/form_eng/ill-print-bldsc-c-se-00
./[ill_libs]/form_eng/ill-print-bldsc-l-cf-00
./[ill_libs]/form_eng/ill-print-bldsc-l-mn-00
./[ill_libs]/form_eng/ill-print-bldsc-l-se-00
./[ill_libs]/form_eng/ill-print-bldsc-l-other-00
./[ill_libs]/form_eng/scrub-patron-ids.xml
./[ill_libs]/form_eng/overdue-apdu-report-body.xml

./[ill_libs]/form_eng/ill-patron-letter-a.xsl

Step 40

1. Converting \$alephe_tab/user_function.lng with new codes for the functions and sub-functions.

2. The following lines where added to \$alephe_tab/user_function.lng:

NAV-MAP	L Overview Tree	MEX	L Mex
PATRON-INFO	L Patron Circulation Info	LOAN-LIST	L View Patron Loan List
PATRON-INFO	L Patron Circulation Info	CASH-LIST	L View Patron Cash List
PATRON-INFO	L Patron Circulation Info	REQUEST-LIST	L View Patron Requests Lists
PATRON-INFO	L Patron Circulation Info	PHOTOS-LIST	L View Patron Photocopy Requests Lists
PATRON-INFO	L Patron Circulation Info	ILL-LIST	L View Patron ILL Requests List
PATRON-INFO	L Patron Circulation Info	BOOKING-LIST	L List Patron Booking Requests
PATRON-INFO	L Patron Circulation Info	PATRON-DETAILS	L Patron Routing list and proxy list
ITEM-REPORT-S	L Item Reports Services	RET-ITEM-02	L RET-ITEM-02 Missing Items Report
ITEM-REPORT-S	L Item Reports Services	EXPORT-03	L EXPORT-03 Smart Barcode Export
INVOICING-S Finance System	L Invoicing Services	ACQ-29	L ACQ-29 Update Invoice from External
PRIV-S	L Private Services	PRIV-01	L PRIV-01 Private Service 01
PRIV-S	L Private Services	PRIV-02	L PRIV-02 Private Service 02
PRIV-S	L Private Services	PRIV-03	L PRIV-03 Private Service 03
PRIV-S	L Private Services	PRIV-04	L PRIV-04 Private Service 04
PRIV-S	L Private Services	PRIV-05	L PRIV-05 Private Service 05
PRIV-S	L Private Services	PRIV-06	L PRIV-06 Private Service 06
PRIV-S	L Private Services	PRIV-07	L PRIV-07 Private Service 07
PRIV-S	L Private Services	PRIV-08	L PRIV-08 Private Service 08
PRIV-S	L Private Services	PRIV-09	L PRIV-09 Private Service 09
PRIV-S	L Private Services	PRIV-10	L PRIV-10 Private Service 10
PRIV-S	L Private Services	PRIV-11	L PRIV-11 Private Service 11
PRIV-S	L Private Services	PRIV-12	L PRIV-12 Private Service 12
PRIV-S	L Private Services	PRIV-13	L PRIV-13 Private Service 13
PRIV-S	L Private Services	PRIV-14	L PRIV-14 Private Service 14
PRIV-S	L Private Services	PRIV-15	L PRIV-15 Private Service 15
PRIV-S	L Private Services	PRIV-16	L PRIV-16 Private Service 16
PRIV-S	L Private Services	PRIV-16	L PRIV-16 Private Service 16

PRIV-S	L Private Services	PRIV-17	L PRIV-17 Private Service 17
PRIV-S	L Private Services	PRIV-18	L PRIV-18 Private Service 18
PRIV-S	L Private Services	PRIV-19	L PRIV-19 Private Service 19
PRIV-S	L Private Services	PRIV-20	L PRIV-20 Private Service 20
PRIV-S	L Private Services	PRIV-21	L PRIV-21 Private Service 21
PRIV-S	L Private Services	PRIV-22	L PRIV-22 Private Service 22
PRIV-S	L Private Services	PRIV-23	L PRIV-23 Private Service 23
PRIV-S	L Private Services	PRIV-24	L PRIV-24 Private Service 24
PRIV-S	L Private Services	PRIV-25	L PRIV-25 Private Service 25
PRIV-S	L Private Services	PRIV-26	L PRIV-26 Private Service 26
PRIV-S	L Private Services	PRIV-27	L PRIV-27 Private Service 27
PRIV-S	L Private Services	PRIV-28	L PRIV-28 Private Service 28
PRIV-S	L Private Services	PRIV-29	L PRIV-29 Private Service 29
PRIV-S	L Private Services	PRIV-30	L PRIV-30 Private Service 30
COURSE-READING	L Course Reading	GLOBAL	L All Unspecified Subfunctions
COURSE-READING	L Course Reading	NEW-UPDATE-COURSE	L New/Update Course
COURSE-READING	L Course Reading	DELETE-COURSE	L Delete Course
COURSE-READING	L Course Reading	ADD-DOC	L Add titles to list
COURSE-READING	L Course Reading	CAT-ADD-DOC	L Catalog new title and add to list
COURSE-READING	L Course Reading	NOTE-COPYRIGHTS-DOC	L Edit Notes/Manage Copyrights
COURSE-READING	L Course Reading	MOVE-SUPP-REMOVE-DOC	L Move/Suppress/Remove title
COURSE-READING	L Course Reading	RESERVE-ITEM	L Reserve Item for Course

3. The following lines where removed from \$alephe_tab/user_function.lng:

WWW-R	L Course Reading	GLOBAL	L All Unspecified Subfunctions
WWW-R	L Course Reading	MAIN	L Course Reading interface
WWW-R	L Course Reading	COURSE-CATALOG	L Course - Catalog Record
WWW-R	L Course Reading	COURSE-DELETE	L Course - Delete course
WWW-R	L Course Reading	MODIFY-ITEM	L Modify item

Step 41

Added the following line to ./alephe/unicode/tab_character_conversion_line:

```
UTF_TO_BL      ##### # line_utf2line_sb      unicode_to_ascii
*****
*****
```

Step 42

Added the following files:

```
./alephe/tab/oai/oaipubconf.xml
./alephe/tab/sru_server/config.xml
./alephe/tab/sru_server/pqf.properties
```

```
*****
*****
```

Step 44

Added the following line to the `/[ADM libs]/pc_tab/catalog/codes.lng` file:

```
R30  N N N L Perm.Loc.for RR L Perm.Location when transferred to Reading Room
```

```
*****
*****
```

Step 47

Created the following new tables:

```
./[bib_libs]/tab/tab_fix_usm2dc
./[bib_libs]/tab/tab_fix_usm2qdc
./[bib_libs]/tab/tab_publish
./[bib_libs]/tab/tab_font_publish
./[bib_libs]/tab/tab_doc_publish
./[adm_libs]/tab/tab_alert
./[adm_libs]/tab/form_sms
./[ill_libs]/tab/form_description.LNG
```

```
*****
*****
```

Step 48

1. Added the following new lines to the files

```
./[adm_libs]/tab/pc_tab_exp_field.eng
./[bib_libs]/tab/pc_tab_exp_field.eng
./[usr_lib]/tab/pc_tab_exp_field.eng:
```

BATCH-LOG-STATUS	L Success	SU
BATCH-LOG-STATUS	L Done with errors	DO
BATCH-LOG-STATUS	L Abort	AB
BATCH-LOG-STATUS	L Running	RU

BATCH-LOG-STATUS	L Failed	FA
BATCH-LOG-JOB-TYPE	L Only Mine	ONLY-MINE
BATCH-LOG-JOB-TYPE	L Run from the server	USER-SYS
BATCH-LOG-JOB-TYPE	L Acquisition	ACQ
BATCH-LOG-JOB-TYPE	L ADAM	ADAM
BATCH-LOG-JOB-TYPE	L Cataloging	CATALOG
BATCH-LOG-JOB-TYPE	L Circulation	CIRC
BATCH-LOG-JOB-TYPE	L ILL	ILL
BATCH-LOG-JOB-TYPE	L Indexing	INDEX
BATCH-LOG-JOB-TYPE	L Items	ITEMS
BATCH-LOG-JOB-TYPE	L Serial	SERIAL
BATCH-LOG-JOB-TYPE	L Staff	STAFF
BATCH-LOG-JOB-TYPE	L System	SYSTEM
BATCH-LOG-JOB-TYPE	L Union	UNION
BATCH-LOG-SORT-TYPE	L Date/Time Descending	DATE-D
BATCH-LOG-SORT-TYPE	L Date/Time Ascending	DATE-A
BATCH-LOG-SORT-TYPE	L Job Type	JOB-TYPE
BATCH-LOG-SORT-TYPE	L Job Status	JOB-STATUS
BATCH-LOG-SORT-TYPE	L Job ID	JOB-KEY

2. Added the following line to `./[usr_lib]/tab/path_convert`:

```
$usr00_dev/usr00/pc_display_eng    $usm50_dev/usm50/pc_display_eng
```

3. Added the following line to `./[pw_lib]/tab/path_convert`:

```
$usr00_dev/usr00/www_x_eng    $aleph_dev/aleph/www_x_eng
```

4. Added the following line to `./[ill_lib]/tab/path_convert`:

```
$usm40_dev/usm40/tab/tab_bor_address    $usm50_dev/usm50/tab/tab_bor_address
```

```
*****
*****
```

Step 49

Updated `./[adm_libs]/tab/tab34` as follows:

Insert new column 4 with '#'

Insert new column 7 with '#####'

```
*****
*****
```

Step 50

Pointed ILL forms to section 111 of ./[ill_library]/tab/edit_paragraph.eng by adding the following lines to ./[adm_library]/tab/bib_format:

```
ill-patron-letter-i      111
ill-patron-letter-5      111
ill-patron-letter-3      111
ill-patron-letter-0      111
ill-patron-letter-c      111
ill-patron-letter-2      111
ill-patron-letter-4      111
ill-send-request-letter   111
ill-arrival-slip-new      111
ill-bor-receive-letter    111
ill-bor-letter-c          111
ill-bor-letter-m          111
ill-bor-letter-l          111
ill-bor-letter-x          111
ill-bor-letter-r          111
ill-bor-letter-d          111
ill-print-lend-request    111
ill-lend-item-list        111
ill-lend-letter-m         111
ill-lend-letter-r         111
ill-lend-letter-a         111
ill-lend-letter-o         111
ill-answer-3              111
ill-answer-2              111
ill-answer-5              111
ill-answer-6              111
ill-lend-supply-slip      111
ill-lend-supply-letter    111
```

```
*****
*****
```

Step 51

Replaced the following line in ./[ill_libs]/tab/tab_ill_bib_info:

Source 590## a

With:

VerificationReferenceSorc 590## a

```
*****
*****
```


Step 52

Added the following line to `/[ill_libs]/tab/tab46.eng`:

83 Y N LDaemon Send Failed

```
*****
*****
```

Step 53

Added the following line to: `[crs_libs]/tab/tab_buf_z403`:

get_buf_z403_media_course VIEW

```
*****
*****
```

Step 54

Replaced the following line in `/[ill_libs]/tab/tab_ill_bib_info`:

VolumeIssue ISS## vi Edition 250## a

with:

VolumeIssue ISS## vi

Edition 250## a

```
*****
*****
```

Step 55

Course-Reading library, configuration files.

1. Added relation for each pair in `$alephe_tab/ library_relation`:

CRS <ADM library> <CRS library>

2. Deleted CNO and SID lines in `./[crs_libs]/dt/tab11_ind` and added the following lines:

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

3. Added the following lines to `./[crs_libs]/dt/tab00.eng`:

H SID	IND	01 00	00	SID
H CNO	IND	02 00	00	CNO
H CNO-S	IND	02 00	00	CNO+Sequence

(If CNO line exists, copy the filing code from it to the CNO-S line).

4. Added the following lines to `./[crs_libs]/tab/tab_z103`:

```
update_z103_lkr
update_z103_course
```

5. Added the following lines to `./[crs_libs]/tab/tab_expand`:

```
HOLDING expand_doc_course
PRE-MERGE expand_doc_course
```

Replaced the following lines:

```
WEB-FULL expand_doc_course
WEB-FULL-1 expand_doc_course
WEB-BRIEF expand_doc_course
```

With:

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

Note that the lines `expand_doc_merge_union_crs` are added at the end of the `tab_expand` table. Therefore, if you use PST, you should manually place them before `expand_doc_bib_loc_n_x`.

6. Moved the value of `www_z37_course_request_days` from `$alephe_root/www_server.conf` to `course_request_days` in `$alephe_root/pc_server_defaults`

7. Added the following files:

```
./[adm_libs]/pc_display_eng /course-details
./[adm_libs] /pc_display_eng /course-details.trn
./[adm_libs]/pc_tab_crs_fast_cat.{lng}
./[adm_libs]/pc_tab_find_course.{lng}
```

```
*****
*****
```

Step 56

Course-Reading library, configuration files.

1. Added the following lines to `./[adm_libs]/tab/tab_alephadm.eng`:

```
tab      pc_tab_crs_fast_cat.eng      Y L Fields for Quick Cataloging in Course Reading
tab      pc_tab_find_course.eng       Y L Fields for Search in Course Reading
```

2. Added a new table: `./[crs_libs]/tab/tab_merge_union`.
3. Added the following lines to `tab100`:
`UNION-LIBRARY=1`
`UNION-IGNORE-MATCH=SUPPRESSED`
4. Added the following to `./alephe/tab/tab_base.{lng}` to define union base for the CRS library:

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

5. Added the following lines to `$alephe_tab/union_global_param`:

```
<CRS library> B candidate_prog    union_candidate_course    100
<CRS library> B match_prog       union_match_course
<CRS library> B preferred_prog    union_preferred_course
<CRS library> B normalize_prog    union_normalize_cdl
```

6. Added the following lines to `./[adm_libs]/tab/pc_tab_exp_field.{lng}`:

```
.    PERIOD possible values:
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!

COURSE-PERIOD       L Winter                   Winter
COURSE-PERIOD       L Spring                   Spring
COURSE-PERIOD       L Summer                   Summer
COURSE-PERIOD       L Not Active               NA
!*

.    Sort of reading list:
COURSE-DOC-SORT-TYPE   L Course                   07---A02---D
COURSE-DOC-SORT-TYPE   L Title                   05---A02---D
COURSE-DOC-SORT-TYPE   L Open Date               08---A02---D
!*

.    copyright (856/655) subfields possible values:
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!

COURSE-COPYRIGHT       L Limited to registered students       E
COURSE-COPYRIGHT       L Open use, no copyright display       Y
COURSE-COPYRIGHT       L Open use with copyright display       N
!*

!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!

COURSE-FEE            L Per view                   VIEW
COURSE-FEE            L Total
```

7. Added the following lines to ./[adm_libs]/pc_tab_col.{lng}

!* Course - Course list

!*
.

PC_COURSE_LIST	L Course Number	01 015 01 C01	Z108-COURSE-NUMBER
PC_COURSE_LIST	L Course Name	02 015 01 C01	Z108-COURSE-NAME
PC_COURSE_LIST	L Section Name	03 015 01 C01	Z108-SECTION-NAME
PC_COURSE_LIST	L Department	04 015 01 C01	Z108-DEPARTMENT
PC_COURSE_LIST	L Instructor	05 015 01 C01	Z108-INSTRUCTOR-NAME
PC_COURSE_LIST	L Date From	06 010 01 C01	Z108-DATE-FROM
PC_COURSE_LIST	L Date To	07 010 01 C01	Z108-DATE-TO

!*
.

!* Course - Docs list

!*
.

PC_COURSE_BIB_LIST	L Doc Number	01 010 01 C01	Doc Number
PC_COURSE_BIB_LIST	L Call Number	02 010 01 C01	Call Number
PC_COURSE_BIB_LIST	L Author	03 015 01 C01	Author
PC_COURSE_BIB_LIST	L Title	04 020 01 C01	Title
PC_COURSE_BIB_LIST	L Year	05 005 01 C01	Year
PC_COURSE_BIB_LIST	L Open Date	06 010 01 C01	Open Date
PC_COURSE_BIB_LIST	L Other Courses	07 010 it map	Doc belongs to other Courses
PC_COURSE_BIB_LIST	L Local	08 000 it map	Doc cataloged in CRS library
PC_COURSE_BIB_LIST	L Suppressed	09 010 it map	conn BIB suppressed
PC_COURSE_BIB_LIST	L Common	10 010 it map	doc from the common list

!*
.

!* Course - Doc List from File

!*
.

PC_COURSE_FILE_LIST	L Title	01 024 01 C03
PC_COURSE_FILE_LIST	L Author	02 018 01 C02
PC_COURSE_FILE_LIST	L Call Number	03 015 01 C04
PC_COURSE_FILE_LIST	L Imprint	04 015 01 C04
PC_COURSE_FILE_LIST	L ISBN/ISSN	05 018 01 C04
PC_COURSE_FILE_LIST	L Year	06 010 01 C04
PC_COURSE_FILE_LIST	L Note	07 020 01 C01
PC_COURSE_FILE_LIST	L Attached	08 010 it map

!*
.

!* Course - Item List

!*
.

PC_COURSE_ITEM_LIST	L Description	01 000 01 C01	z30-Description
PC_COURSE_ITEM_LIST	L Due Date	02 000 01 C02	z36-Due Date

Replaced:
 setenv file_list_type ILL2
With:
 setenv file_list_type ILL

Step 59

JBOSS configuration, corrected the path of JAVA installation.

In \$alephe_root/jboss_conf/global.properties replace:
java.home=@_A_MOUNT/a18_@_AL_COPY/product/j2sdk1.4.2_04
with:
java.home=@_A_MOUNT/a19_@_AL_COPY/product/local/java

Step 60

1. Updated the following line in ./alephe/tab/tab_ill_status_borro:

Replaced:

GWP WAP LOF

With:

GWP WAP LOF DSF

2. Add the following line to ./alephe/tab/tab_ill_change_status_out

DSF WAP

6.3.Changes in ORACLE Tables

Step 1000

1. Changed Z66 table (Password Information):

New field: Z66-ERM-USER - VARCHAR2(30)

New field: Z66-ERM-PASSWORD - VARCHAR2(60)

2. If the table Z660 exists, populate the fields above as follows:

Z66-ERM-USER = Z660-ERM-USER

Z66-ERM-PASSWORD = Z660-ERM-PASSWORD

Step 1001

Z67: permissions upgrade - reorganizes the z67_func and z67_sub_func values

Step 1002

1) Z13U - New fields:

Z13U-USER-DEFINED-1-CODE

Z13U-USER-DEFINED-1

Z13U-USER-DEFINED-2-CODE

Z13U-USER-DEFINED-2

Z13U-USER-DEFINED-3-CODE

Z13U-USER-DEFINED-3

Z13U-USER-DEFINED-4-CODE

Z13U-USER-DEFINED-4

Z13U-USER-DEFINED-5-CODE

Z13U-USER-DEFINED-5

2) Data for new fields in Z13U - comes from Z13

3) Removed the following fields from Z13:

Z13-USER-DEFINED-1-CODE

Z13-USER-DEFINED-1

Z13-USER-DEFINED-2-CODE

Z13-USER-DEFINED-2

Z13-USER-DEFINED-3-CODE

Z13-USER-DEFINED-3

Z13-USER-DEFINED-4-CODE

Z13-USER-DEFINED-4

Z13-USER-DEFINED-5-CODE

Z13-USER-DEFINED- 5

Step 1003

Added a new field to Z37 (Hold Requests and Booking Requests):

Z37-REQUEST-IDENTIFIER - CHAR(100) - should be added when holding spaces

Step 1004

1. Z31_KEY changed in the Oracle from VARCHAR2 to CHAR
2. Two new indexes on Z31: z31_id6 and z31_id7

Step 1005

1. Created Z100 in \$usr_library
2. Added to file_list (table and indexes)
3. Added the new sequence: last-batch-job-no to Z52 in USR library with value zero

Step 1006

Added a new field to Z77:

Z77-VAT-METHOD

If Z77-I-NO-ITEM = 0 then Z77-VAT-METHOD = I
If Z77-I-NO-ITEM = 1 then Z77-VAT-METHOD = E

Step 1007

Added a new index to Z70, on z70_additional_vendor_code

Z70_ADDITIONAL_VENDOR_CODE Oracle's DATATYPE was changed from:

Z70_ADDITIONAL_VENDOR_CODE VARCHAR2(20)

To:

Z70_ADDITIONAL_VENDOR_CODE CHAR(20)

Step 1008

1. Z403-PID size changed from 40 to 200 bytes.
2. New field: Z403-STREAM-LINK has been added

Step 1009

1. Upgrading Z73 table:

Three fields have been added to Z73 table:

03 Z73-LOG-RECORD-SEQUENCE PICTURE 9(9).

02 Z73-MATCH-STATUS PICTURE X(1).

02 Z73-DOC-NUMBER PICTURE 9(9).

Z73-LOG-RECORD-SEQUENCE have been added to the
Z73-REC-KEY group.

Upgrading the Z73-REC-KEY:

From the old Z73-REC-KEY move positions 1-9 to
new Z73-REC-KEY positions 1-9.

2. Populating tab_loader:

Populated column 1 (049 code) with column 1 of tab_z30

Populated column 2 (OWN code) with column 2 of tab_z30

Populated column 3 (OWN group) with column 9 of tab_z30

Populated column 4 (item) with column 10 of tab_z30

Populated column 5 (holding) with column 11 of tab_z30

Populated column 6 (order) with 0

Populated column 7 (budget transaction) with 0

Populated column 8 (multi bib creation) with 0

3. Populating tab_loader_def:

From tab_z30:

For each line in tab_z30, five lines will be created in tab_loader_def -

Populated column 1 (field name) with name of columns 3,4,5,6 & 8
from tab_z30.

Populated column 2 (049 code) with column 1 of tab_z30

Populated column 3 (field value) with value of columns 3,4,5,6 & 8
from tab_z30.

From bib_lib/tab/import/tab_96_def:

Concatenate file as is.

Step 1010

1. Created table z00p in the USR library.
2. Created table z07p in the BIB and AUT libraries.
3. Created new sequence in the usr_library: last_publish_seq

Step 1011

1. Updated Z30 table:

Old:

Z30_ARRIVAL_DATE NUMBER(8)

Z30_EXPECTED_ARRIVAL_DATE NUMBER(8)

New:

Z30_ARRIVAL_DATE CHAR(8)

Z30_EXPECTED_ARRIVAL_DATE CHAR(8)

2 new indexes are created for them: z30_id13, z30_id12

2. Added new field to Z30 table:

Z30_PROCESS_STATUS_DATE NUMBER(8)

Step 1012

Course-Reading library - Changed the Bibliographic doc and the Connection doc of the Z00 table in order to match the structure.

Step 1013

Course-Reading library - moved Z108 table from the CRS library to its matching ADM library and updated the structure of Z108 table.

Step 1014

Course-Reading library - moved Z107 table from the PW library to all ADM libraries.

Step 1015

Created Z120 in Course-Reading libraries.

Step 1016

Created Z127 in Course-Reading libraries.

Step 1017

Added a new field to Z61: Z61-NEW-ACQ-REQUEST (Y/N)

If TAB100-OPAC-NEW-ACQ of bib_library/tab100 is "Y" and

Z61-NEW-BOOK-PERMISSION = "Y"

then

Z61-NEW-ACQ-REQUEST = "Y"

else

Z61-NEW-ACQ-REQUEST = "N"

Step 1018

Added a new field to Z410: Z410-ARCHIVE (Y/N)

Default value: "N"

If Z410-UPDATE-DATE = 99999999 then the Z410-ARCHIVE is set to "Y"

Step 1019

Added a new field to Z416: Z416-ARCHIVE (Y/N)

Default value: "N"

If Z416-UPDATE-DATE = 99999999 then the Z416-ARCHIVE is set to "Y"

7. OPAC Implementation Notes

7.1 Abstract

This section lists the changes that you must apply to the revision in order to be able to work with it.

In order not to override the customization that you may have added to previous releases, the HTML pages and tables that were customized from the previous release are used. The list of changes you must make to these pages and tables is listed below.

The following table summarizes the new/removed and modified files. It also provides a list of changes made to the modified files.

New files:	Deleted Files:	Modified Files:
Files under www_f_eng abrs-maps acq-request acq-request-confirm acq-request-doc-head	Files under www_f_eng full-set-body-1-ucs full-set-head-1-ucs full-set-head-2-ucs full-set-head-bor-ext-ill	Files under www_f_eng base-list base-list-bl101 booking-page-head booking-page-item-info

New files:	Deleted Files:	Modified Files:
acq-request-doc-head-conf acq-request-doc-tail acq-request-doc-tail-conf bor-acq-body bor-acq-exp-back bor-acq-exp-cancel bor-acq-exp-data bor-acq-head bor-acq-no-acq bor-acq-tail booking-req-expand-head bor-cash-exp-head bor-history-loan-exp-head bor-hold-exp-head bor-include-3 bor-include-4 bor-loan-exp-head bor-photo-exp-head bor-title-exp-head floating-keyboard floating-keyboard.js floating-keyboard.xml icon/bg_strip.gif icon/f-renew.gif ill-alternate-unit-b ill-alternate-unit-h ill-alternate-unit-t ill-message-page message-page new-ill-req-conf-bib new-ill-req-conf-bib-1 new-ill-req-conf-bib-2 new-ill-req-conf-cancel-tail new-ill-req-conf-copyright new-ill-req-conf-head new-ill-req-conf-info new-ill-req-conf-iss-i new-ill-req-conf-iss-p new-ill-req-conf-iss-v new-ill-req-conf-iss-y new-ill-req-conf-tail short-2-head-cdl90 title-group-dropdown-menus-body title-group-dropdown-menus-issue title-group-dropdown-menus-month title-group-dropdown-menus-	full-set-head-nobor-ext-ill head-1-bor-ill-00 head-1-bor-ill-02 head-1-nobor-ext-ill-02-pds head-1-nobor-ext-ill-pds head-1-nobor-ill-00 head-1-nobor-ill-02 head-replace-ill-00 head-replace-ill-02 new-ill-book-request-conf new-ill-journal-request-conf new-ill-request-confirm new-ill-request-confirm-tail title-group-selection-head-2	booking-req-expand booking-req-list-head bor-cash-exp bor-cash-sub-head bor-history-loan-exp bor-history-loan-head bor-hold-exp bor-hold-head bor-ill-exp bor-ill-exp-ext bor-include-1 bor-include-2 bor-info-single-adm bor-loan-body bor-loan-exp bor-loan-head bor-new bor-note-new bor-photo-exp bor-photo-head bor-title-exp bor-title-head bor-update bor-update-without-date close-window-ill exlibris.css exlibris.css.tml find-a find-d find-m full-999-body-media full-mail full-mail-usm90 full-set-head-bor full-set-head-ill full-set-head-ill-00 full-set-head-ill-02 group-request-head group-request-exec-head head-1-bor head-1-nobor item-global-body item-global-body-head item-global-exp item-hold-request-head item-hold-request-details item-photo-request-head item-schedule-head

New files:	Deleted Files:	Modified Files:
tail title-group-dropdown-menus-volume title-group-dropdown-menus-year title-request-form-no-pickup user-info-mail Files under www_x_eng user-auth.tag		login login-ill login-session media-display-exec myshelf-course myshelf-delete-doc myshelf-delete-folder myshelf-folder-list myshelf-folder-list-left-body-2 myshelf-folder-list-left-body-3 myshelf-mail myshelf-refresh-page myshelf-short-body myshelf-short-head-2 myshelf-short-head-2-no-course new-ill-book-request new-ill-journal-request new-ill-r-1 new-ill-r-head service-sfx-record sfx-admin sfx-au sfx-record sfx-record-ver-0.1 sfx-record-ver-1.0 sfx-subject sfx-title short-a-body short-mail short-mail-usm90 short-tail title-group-selection-head title-request-form-tail verde-redirect Files under www_c_eng c-bor-list-head

7.1. Files updated:

The following files under \$alephe_root were changed to allow for new features or bug fixes. The detailed changes are listed for each file. The string to change appears in red. Extra comments are in blue.

File changes can be related to:

- New Integrated ILL
- Addition of fields to the Z303 record
- Additions to the Title request creation from the Web
- Indications in My e-Shelf when the contributing library already has the marked records
- Course reading
- Addition of an option to Save/Mail records from “My Library Card”
- Addition of multi-language floating keyboard to the Web OPAC
- Addition of renewal information to the Web client and the PC client
- Addition of BIB information in expanded information screens in the OPAC
- Note for borrower is now possible using the patron barcode
- Definition of a special login page for DSC readers – *required by the British Library*
- Creation of a new patron and profile in the Union Catalog Web interface
- Bug fixes
- Miscellaneous

Changes that are related to New Integrated ILL

bor-ill-exp-ext:

Replace:

```
<td class=td1 id=bold align=left>Note:</td>
```

With:

```
<td class=td1 id=bold align=left>Staff Note:</td>
```

Immediately after the lines:

```
<td class=td1 align=left>&nbsp;$0500</td>
</tr>
```

Add:

```
<tr>
  <td class=td1 id=bold align=left>Patron Note:</td>
  <td class=td1 align=left>&nbsp;$2100</td>
</tr>
```

Immediately after the lines (**for MAB environment**):

```
<td class=td1 align=left>&nbsp;$0700</td>
</tr>
```

Add:

```
<tr>
  <td class=td1 id=bold align=left>Periodical article author:</td>
  <td class=td1 align=left>&nbsp;$2200</td>
</tr>
```

bor-ill-exp (for MAB environment)

Immediately after the lines:

```
<td class=td1 align=left>&nbsp;$0700</td>
</tr>
```

Add:

```
<tr>
  <td class=td1 id=bold align=left>Periodical article author:</td>
  <td class=td1 align=left>&nbsp;$2200</td>
</tr>
```

bor-info-single-adm:

Immediately after the lines

```
<td class=td1 align=left>
  <a href="javascript:replacePage('&server_f?func=bor-ill-active');">
    &nbsp;$3300
  </td>
</tr>
```

Add:

```
<tr>
  <td class=td1 align=left>
    ILL Recently Closed</a>
  </td>
  <td class=td1 align=left>
    <a href="javascript:replacePage('&server_f?func=bor-ill-
close&days=010');">
      &nbsp;10 days
    </td>
    <td class=td1 align=left>
      <a href="javascript:replacePage('&server_f?func=bor-ill-
close&days=030');">
        &nbsp;30 days
      </td>
      <td class=td1 align=left>
        <a href="javascript:replacePage('&server_f?func=bor-ill-
close&days=060');">
          &nbsp;60 days
        </td>
</tr>
```

Change manually only the files that are defined in your system below:

For Old ILL

Rename: **full-set-head-bor**

To: **full-set-head-ill**

Replace the link:

```
<a href="&server_f?func=ill-request-doc&doc_number=$0600"
title="Create ILL Request" class="blue">
```

With:

```
<a href=&server_f?func=new-ill-request-
l&doc_library=$0700&doc_number=$0600 title="ILL Request"
class=blue>
```


Rename: **full-set-head-nobor**
To: **full-set-head-ill-nobor**

Replace the link:

```
<a href="&server_f?func=ill-request-doc&doc_number=$0600"
title="Create ILL Request" class="blue">
```

With:

```
<a href=&server_f?func=new-ill-request-
l&doc_library=$0700&doc_number=$0600 title="ILL Request"
class=blue>
```

For Web ILL

Rename (if exists): **full-set-head-ill-00**
To: **full-set-head-ill**

Replace the link:

```
<a href='javascript:open_window("&server_f?func=service-
ill&doc_library=$0700&doc_number=$0600");' title="ILL Request"
class=blue>
```

With:

```
<a href=&server_f?func=new-ill-request-
l&doc_library=$0700&doc_number=$0600 title="ILL Request"
class=blue>
```

For integrated ILL

Rename (if exists): **full-set-head-ill-02**
To: **full-set-head-ill**

new-ill-book-request, new-ill-journal-request:

Replace:

```
<a href="&server_f?func=new-ill-request-l&request_type=BOOK"
```

With:

```
<a href="&server_f?func=new-ill-request-
l&request_type=BOOK&illunit=$2900"
```

Replace:

```
<a href="&server_f?func=new-ill-request-l&request_type=JOURNAL"
```

With:

```
<a href="&server_f?func=new-ill-request-
l&request_type=JOURNAL&ILLUNIT=$2900"
```

Immediately after the line:

```
<input type=hidden name="BIB____008____" value="-----b-----r-----
000-0-und-d">
```

Add:

```
<input type=hidden name=ILLUNIT value="$2900">
```

new-ill-book-request:

Replace:

```
<input type=hidden name="BIB__LDR__" value="-----nam-----a-----">
```

With:

```
<input type=hidden name="BIB__LDR__" value="^^^^nam^a22^^^^a^4500">
```

Remove the line:

```
<input type=hidden name="BIB__592__" value="MN">
```

new-ill-journal-request:

Replace:

```
<input type=hidden name="BIB__LDR__" value="-----nam-----a-----">
```

With:

```
<input type=hidden name="BIB__LDR__" value="^^^^nas^a22^^^^a^4500">
```

Remove the line:

```
<input type=hidden name="BIB__592__" value="SE">
```

new-ill-r-1:

Replace:

```
<input size=15 maxlength=15 name="BIB__ISS__p_1800" value="$1800">
</td>
```

With:

```
<input size=15 maxlength=15 name="BIB__ISS__p_2500" value="$2500">
</td>
```

new-ill-r-head:

Immediately after the line:

```
<input type=hidden name="Z40__PAY" value="Y" >
```

Add:

```
<input type=hidden name=ILLUNIT value="$2900">
```

close-window-ill:

Replace:

```
opener.location.href.substring(0, opener.location.href.indexOf('?')) +
'?func=file&file_name=login-ill&P01=$0100');
```

With:

```
opener.location.href.substring(0, opener.location.href.indexOf('?')) +
'?func=file&file_name=login-ill&P01=$0100&heading_number=$0200');
```

bib-request-no-items

Replace:

```
To continue, <a href="&server_f?func=ill-request-doc&doc_number=$0100" title="Create ILL request">
```

With:

To continue, ``

head-1-bor

Replace:

``

With:

``

head-1-nobor, head-1-nobor-pds

Replace:

``

With:

``

head-replace

Replace:

``

With:

``

new-ill-book-request

Replace:

`<input size=40 maxlength=120 name="BIB__260__b_2000" value="$2000">`

With:

`<input size=40 maxlength=120 name="BIB__260__b_3300" value="$3300">`

Changes that are related to the new Course Reading

Change the following Web pages for the course reading library (XXX30) to match the indexes you defined:

[./alephe/www_f_eng/find-code-include-usm30](#)

[./alephe/www_f_eng/scan-include-2-usm30](#)

[./alephe/www_f_eng/short-a-body-usm30](#)

After Setting the bases in \$alephe_tab/tab_base

Change the following web page to include the bases you set:

[./alephe/www_f_eng/base-list](#)

Remove the link to the old web course reading module:

s-main-2

Remove the following lines:

```
<a href=&server_reserve/start/usm30 target=error>Course Reading  
Management</a>  
<span class="text2">  
- Reading lists for courses  
</span>  
<br>
```

Changes that are related to the addition of fields to the Z303 record

bor-new:

Minimum changes required:

Immediately after the lines

```
<td class=td2>  
  <input name=M_Z304_DATE_TO size=8 maxlength=8 value="$2000">  
  <span class="text1"> (yyyymmdd)</span>  
</td>  
</tr>
```

Add:

```
<tr>  
<td class=td2 width=20%>Gender:</td>  
<td class=td2 width=1%>&nbsp;</td>  
<td class=td2>  
  <select name=N_Z303_GENDER>  
    <option value= $$2800-S""></option>  
    <option value=M $$2800-S"M">Male</option>  
    <option value=F $$2800-S"F">Female</option>  
  </select>  
</td>  
</tr>  
<tr>  
<td class=td2 width=20%>Place of Birth:</td>  
<td class=td2 width=1%>&nbsp;</td>  
<td class=td2>  
  <input name=N_Z303_BIRTHPLACE size=35 maxlength=30  
value="$2900">  
</td>  
</tr>
```

Replace:

```
<option value= "$2800-S"></option>
```

With:

```
<option value=" "$2800-S"></option>
```

Changes to the addition of Title request creation from the Web

title-group-selection-head:

Minimum changes required:

Remove the lines:

```
<table width=100%>
<tr class=tr1>
<th class="text3"> &nbsp;</th>
<th class="text3">Year</th>
<th class="text3">Month</th>
<th class="text3">Day</th>
<th class="text3">Volume</th>
<th class="text3">Issue</th>
<th class="text3">Part</th>
<th class="text3">Material</th>
</tr>
```

title-request-form-tail:

Minimum changes required:

Immediately after the lines

```
<a href="javascript:document.form1.reset();">
</a>
```

Add:

```
<a href="javascript:window.history.back();">
</a>
```

Add an indication in My e-Shelf when the contributing library already has the marked records

myshelf-short-body:

Minimum changes required:

At the end of the file, just above the line

```
</tr>
```

Add the line:

```
<td class=td1 $3200 width="10%" valign=top>$1400</td>
```

myshelf-short-head-2, myshelf-short-head-2-no-course:

Minimum changes required:

At the end of the file, just above the line

```
</tr>
```

Add the line:

```
<th class="text3">$1300</th>
```

Addition of Save/Mail records from “My Library Card”

booking-req-list-head, bor-hold-head, bor-cash-sub-head, bor-history-loan-head, bor-photo-head, bor-title-head:

Minimum changes required:

Replace

`<include>bor-include-1`

With

`<include>bor-include-3`

bor-loan-head

Minimum changes required:

Replace

`<include>bor-include-2`

With

`<include>bor-include-4`

Adding multi-language floating keyboard to the Web OPAC

find-a:

Minimum changes required:

Just above the line

`</head>`

Add the lines:

```
<script language="Javascript">
<!--
    function reset_id() {
        var x=document.getElementsByName("request");
        for (i=0 ; i<x.length ; i++) {
            x[i].id="";
        }
    }
// -->
</script>
```

Replace the line:

`<input size=35 name=request value="$0100">`

With

`<input size=35 name=request value="$0100" id='selected_element'
onFocus="reset_id(); this.id='selected_element';">`

Replace the line:

`<input size=35 name=request value="$0200">`

With

`<input size=35 name=request value="$0200" id='selected_element'
onFocus="reset_id(); this.id='selected_element';">`

Replace the line:

`<input size=35 name=request value="$0300">`

With

```
<input size=35 name=request value="$0300" id='selected_element'  
onFocus="reset_id(); this.id='selected_element';">
```

Replace the line:

```
<input size=35 name=request value="$0400">
```

With

```
<input size=35 name=request value="$0400" id='selected_element'  
onFocus="reset_id(); this.id='selected_element';">
```

Replace the line:

```
<input size=35 name=request value="$0500">
```

With

```
<input size=35 name=request value="$0500" id='selected_element'  
onFocus="reset_id(); this.id='selected_element';">
```

Replace the line:

```
<input size=35 name=request value="$0600">
```

With

```
<input size=35 name=request value="$0600" id='selected_element'  
onFocus="reset_id(); this.id='selected_element';">
```

Immediately after the lines

```
<a href="&server_f?func=find-a-0&clear_level=2">  
</a>
```

Add the line:

```
For other languages <a href="javascript:void(0);" onClick=  
"javascript:window.  
open('&server_f?func=file&file_name=floating-  
keyboard','mywin','left=100,top=50,width  
=520,height=350,toolbar=0, resizable=0');">click here</a>
```

find-d:

Minimum changes required:

Just above the line

```
</head>
```

Add the lines:

```
<script language="Javascript">  
<!--  
function reset_id() {  
var x=document.getElementsByName("request");  
for (i=0 ; i<x.length ; i++) {  
x[i].id="";  
}  
}  
// -->  
</script>
```

Replace the line:

```
<input size=25 name=request value="$0200">
```

With

```
<input size=25 name=request value="$0200" id='selected_element'  
onFocus="reset_id(); this.id='selected_element';">
```

Replace the line:

```
<input size=25 name=request value="$1200">
```

With

```
<input size=25 name=request value="$1200" id='selected_element'  
onFocus="reset_id(); this.id='selected_element';">
```

Replace the line:

```
<input size=25 name=request value="$2200">
```

With

```
<input size=25 name=request value="$2200" id='selected_element'  
onFocus="reset_id(); this.id='selected_element';">
```

find-m:

Minimum changes required:

Replace the line:

```
<input size=40 name=request value="$0100">
```

With

```
<input size=40 name=request value="$0100" id='selected_element'>
```

short-tail:

Minimum changes required:

Replace the line

```
<input size=50 name="ccl_term" value='$1100'>
```

With

```
<input size=50 name="ccl_term" value='$1100' id='selected_element'>
```

Renewal information for the Web client and the PC client

bor-loan-body:

Minimum changes required:

Immediately after the line:

```
<td class=td1 valign=top>$1200</td>
```

Add:

```
<td class=td1 valign=top>$1600</td>
```

bor-loan-exp:

Minimum changes required:

Immediately after the lines:

```
<tr>
```

```
<td class=td1 id=bold align=left>Fine:</td>
```



```
<td class=td1 align=left>$0500</td>
</tr>
```

Add:

```
<tr>
  <td class=td1 id=bold align=left>Number of Renewals:</td>
  <td class=td1 align=left>$1700</td>
</tr>
```

bor-loan-head:

Minimum changes required:

Immediately after the lines:

```
<th class=text3>
SFX
</th>
```

Add:

```
<th class=text3>
  Number of Renewals
</th>
```

Added BIB information in the expanded information screens in the OPAC

Please note: All the changes that appear under “Minimum changes required” are mandatory, otherwise the expand functions will not work

booking-req-expand, bor-cash-exp, bor-history-loan-exp, bor-hold-exp, bor-loan-exp, bor-photo-exp, bor-title-exp:

Minimum changes required:

Replace the lines

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN"
"http://www.w3.org/TR/html4/loose.dtd">
<!-- filename: ....-exp -->
<html>
<head>
<include>meta-tags
<include>replace-page-js
<title>&f-base - .....</title>
</head>
<body topmargin="0">
<include>head-replace
```

With

```
</table>
```

bor-cash-exp

Immediately after the lines:

```
<tr>
  <td class=td1 id=bold width="25%">Date:</td>
  <td class=td1>&nbsp;$0200</td>
```

```

</tr>
Add:
<tr>
<td class=td1 id=bold width="25%">Status:</td>
<td class=td1>&nbsp;$2600</td>
</tr>
<tr>
<td class=td1 id=bold width="25%">Credit:</td>
<td class=td1>&nbsp;$2400</td>
</tr>
<tr>
<td class=td1 id=bold width="25%">Debit:</td>
<td class=td1>&nbsp;$2500</td>
</tr>

```

Immediately after the lines:

```

<tr>
<td class=td1 id=bold width="25%">Transfer ID:</td>
<td class=td1>&nbsp;$2300</td>
</tr>

```

Add:

```

<tr>
<td class=td1 id=bold width="25%">Year:</td>
<td class=td1>&nbsp;$2700</td>
</tr>

```

bor-history-loan-exp

Immediately after the lines:

```

<tr>
<td class=td1 id=bold align=left width="40%">Returned date:</td>
<td class=td1 align=left>$0500</td>
</tr>

```

Add:

```

<tr>
<td class=td1 id=bold align=left width="40%">Sublibrary:</td>
<td class=td1 align=left>$1800</td>
</tr>

```

bor-hold-exp

Immediately after the lines:

```

<tr>
<td class=td1 id=bold align=left>Note:</td>
<td class=td1>&nbsp;$0500</td>
</tr>

```

Add:

```

<tr>
<td class=td1 id=bold align=left>Request status:</td>
<td class=td1>&nbsp;$1800</td>
</tr>
<tr>

```

```

<td class=td1 id=bold align=left>Request date:</td>
<td class=td1>&nbsp;$1900</td>
</tr>
<tr>
  <td class=td1 id=bold align=left>End request date:</td>
  <td class=td1>&nbsp;$2000</td>
</tr>
<tr>
  <td class=td1 id=bold align=left>Hold date:</td>
  <td class=td1>&nbsp;$2100</td>
</tr>

```

Immediately after the lines:

```

<tr>
  <td class=td1 id=bold align=left>Proxy Name:</td>
  <td class=td1>&nbsp;$1700</td>
</tr>

```

Add:

```

<tr>
  <td class=td1 id=bold align=left>Group ID:</td>
  <td class=td1>&nbsp;$2200</td>
</tr>

```

bor-ill-exp-ext

Immediately after the lines:

```

<tr>
  <td class=td1 id=bold align=left>Need before:</td>
  <td class=td1 align=left>&nbsp;$1300</td>
</tr>

```

Add the lines

```

<tr>
  <td class=td1 id=bold align=left>Due date:</td>
  <td class=td1 align=left>&nbsp;$1900</td>
</tr>
<tr>
  <td class=td1 id=bold align=left>Update date:</td>
  <td class=td1 align=left>&nbsp;$2000</td>
</tr>

```

bor-loan-exp

Immediately after the lines:

```

<tr>
  <td class=td1 id=bold align=left>Proxy Name:</td>
  <td class=td1 align=left>$1500</td>
</tr>

```

Add:

```

<tr>
  <td class=td1 id=bold align=left>Letter number:</td>
  <td class=td1 align=left>$1800</td>
</tr>

```

bor-photo-exp

Immediately after the lines:

```

<tr>
  <td class=td1 id=bold align=left>Note:</td>
  <td class=td1 align=left>&nbsp;$0500</td>
</tr>

```

Add:

```

<tr>
  <td class=td1 id=bold align=left>Status:</td>
  <td class=td1 align=left>&nbsp;$0800</td>
</tr>
<tr>
  <td class=td1 id=bold align=left>Date:</td>
  <td class=td1 align=left>&nbsp;$0900</td>
</tr>

```

Immediately after the lines:

```

<tr>
  <td class=td1 id=bold align=left width=5%>Pickup/delivery location:</td>
  <td class=td1 align=left>&nbsp;$0600</td>
</tr>

```

Add:

```

<tr>
  <td class=td1 id=bold align=left>Sublibrary:</td>
  <td class=td1 align=left>&nbsp;$1000</td>
</tr>
<tr>
  <td class=td1 id=bold align=left>Item Description:</td>
  <td class=td1 align=left>&nbsp;$1100</td>
</tr>
<tr>
  <td class=td1 id=bold align=left>Location 1:</td>
  <td class=td1 align=left>&nbsp;$1200</td>
</tr>
<tr>
  <td class=td1 id=bold align=left>Location 2:</td>
  <td class=td1 align=left>&nbsp;$1300</td>
</tr>

```

bor-title-exp

Immediately after the lines:

```

<tr>
  <td class=td1 id=bold align=left>Note:</td>
  <td class=td1>&nbsp;$0500</td>

```

</tr>

Add:

<tr>

<td class=td1 id=bold align=left>Request date:</td>

<td class=td1> \$1800</td>

</tr>

<tr>

<td class=td1 id=bold align=left>End request date:</td>

<td class=td1> \$1900</td>

</tr>

Immediately after the lines:

<tr>

<td class=td1 id=bold align=left>Proxy Name:</td>

<td class=td1> \$1700</td>

</tr>

Add:

<tr>

<td class=td1 id=bold align=left>Delete request:</td>

<td class=td1> \$2000</td>

</tr>

item-global-body

Immediately after the lines:

<!--Location-->

<td class=td1>\$0700</td>

Add

<!--Copy Number-->

<td class=td1 ALIGN="CENTER">\$1700</td>

item-global-body-head

Immediately after the lines:

<th class="text3">Location</th>

Add

<th class="text3">Copy Number</th>

item-global-exp

Immediately after the lines:

<tr>

<td class=td1 id=bold align=left>Location:</td>

<td class=td1 align=left>\$0800</td></tr>

Add

<tr>

<td class=td1 id=bold align=left>Copy Number:</td>

<td class=td1 align=left>\$1600</td>

</tr>

Note for borrower is now possible by patron barcode

bor-note-new:

Minimum changes required:

* *Borrower ID/Barcode :*

Please note: the value is the special login file name

 |

Base to search
</td>

Add:

```
<td class=td2 id="small">
<include>find-code-include\FXX\3100\
</td>
<td class=td2 id="small">
  <input size=25 name=request value='$3200'
    onFocus="reset_id(); this.id='selected_element';">
</td>
<td class=td2 align=left >
  <input type="radio"
    name=adjacent4
    value="N"
    $$3400-C"N"> No &nbsp;
  <input type="radio"
    name=adjacent4
    value="Y"
    $$3400-C"Y"> Yes
</td>
<td class=td2 valign=middle>
  &nbsp;$3300
</td>
</tr>
<tr>
  <td class=td2 id="small">
<include>find-code-include\FXX\4100\
</td>
<td class=td2 id="small">
  <input size=25 name=request value='$4200'
    onFocus="reset_id(); this.id='selected_element';">
</td>
<td class=td2 align=left >
  <input type="radio"
    name=adjacent5
    value="N"
    $$4400-C"N"> No &nbsp;
  <input type="radio"
    name=adjacent5
    value="Y"
    $$4400-C"Y"> Yes
</td>
<td class=td2 valign=middle>
  &nbsp;$4300
</td>
</tr>
</tr>
```

To display the expected new date on which the item will be due after the recall is executed.

item-hold-request-details

Add the place holder:

Item has been requested for pickup at \$0300.*\$0500*
</td>

SMS messaging

bor-info

Immediately after the following lines:

\$4900</td>

</tr>

Add:

<tr>

<td class=td2 width=30%>SMS Number</td>

<td class=td2>

\$7200</td>

</tr>

<tr>

<td class=td2 width=30%>Receive SMS</td>

<td class=td2>

\$7300</td>

</tr>

bor-new

Immediately after the lines:

<input name=N_Z304_TELEPHONE2 size=30 maxlength=29
value="\$1500">

</td>

</tr>

Add:

<tr>

<td class=td2 width=20%>SMS Number</td>

<td class=td2 width=1%> </td>

<td class=td2>

*<input name=N_Z304_SMS_NUMBER size=30 maxlength=29
value="\$7400">*

</td>

</tr>

<tr>

<td class=td2 width=20%>Receive SMS</td>

<td class=td2> </td>

<td class="td2">

*<input type="checkbox" name="N_Z303_WANT_SMS" value="Y"
\$7500-C"Y">*

</td>

</tr>

bor-update, bor-update-without-date

Immediately after the lines:

```
<td class=td2> <input size=30 name="F15" value="$1500"></td>
</tr>
```

Add:

```
<tr>
  <td class=td2 width=30%>SMS Number</td>
  <td class=td2> <span class=text2></span> </td>
  <td class=td2> <input size=30 name="F16" value="$1600"></td>
</tr>

<tr>
  <td class=td2 width=30%>Receive SMS</td>
  <td class=td2>&nbsp;</td>
  <td class="td2">
    <input type="checkbox" name="F17" value="Y" $1700-C"Y">
  </td>
</tr>
```

Displaying ILL request expand fields in "My Library Card"

bor-ill-exp-ext

Immediately after the line:

```
<td class=td1 align=left>&nbsp;<input type="checkbox" value="Y" $2000-C"Y">
</td>
</tr>
```

Add:

```
<tr>
  <td class=td1 id=bold align=left>Define-1:</td>
  <td class=td1 align=left>&nbsp;<input type="checkbox" value="Y" $1500-C"Y">
</td>
</tr>
<tr>
  <td class=td1 id=bold align=left>Define-2:</td>
  <td class=td1 align=left>&nbsp;<input type="checkbox" value="Y" $1600-C"Y">
</td>
</tr>
<tr>
  <td class=td1 id=bold align=left>Define-3:</td>
  <td class=td1 align=left>&nbsp;<input type="checkbox" value="Y" $1700-C"Y">
</td>
</tr>
<tr>
  <td class=td1 id=bold align=left>Define-4:</td>
  <td class=td1 align=left>&nbsp;<input type="checkbox" value="Y" $0800-C"Y">
</td>
</tr>
<tr>
  <td class=td1 id=bold align=left>Define-5:</td>
  <td class=td1 align=left>&nbsp;<input type="checkbox" value="Y" $1800-C"Y">
</td>
</tr>
```

Adding a link to the abrs-maps screen

base-list-bll01

Immediately after the lines:

```
Humanities and Social Sciences Collection </a>
</td>
</tr>
<tr>
```

Add:

```
<td class=text3 width="451">
  
  <a href="&server_f?func=abrs-check-bor-st&file_name=abrs-
maps">
    Maps Collection </a>
  </td>
</tr>
<tr>
```

To enable the patron to keep track of the acquisition request that he submitted

bor-info, bor-info-single-adm

Immediately after the following lines:

```
ILL Recently Closed</a>
</td>
<td class=td1 align=left>
  <a href="javascript:replacePage('&server_f?func=bor-ill-
close&days=010');">
    &nbsp;&nbsp;&nbsp;10 days
  </td>
<td class=td1 align=left>
  <a href="javascript:replacePage('&server_f?func=bor-ill-
close&days=030');">
    &nbsp;&nbsp;&nbsp;30 days
  </td>
<td class=td1 align=left>
  <a href="javascript:replacePage('&server_f?func=bor-ill-
close&days=060');">
    &nbsp;&nbsp;&nbsp;60 days
  </td>
</tr>
```

Add:

```
<tr>
  <td class=td1 align=left>
```

```

        Total acq requests</a>
    </td>
    <td class=td1 align=left>
        <a href="javascript:replacePage('&server_f?func=bor-acq');">
        &nbsp;$5100
    </td>
</tr>
<tr>
    <td class=td1 align=left>
        Active acq requests</a>
    </td>
    <td class=td1 align=left>
        <a href="javascript:replacePage('&server_f?func=bor-acq-active');">
        &nbsp;$5200
    </td>
</tr>
<tr>
    <td class=td1 align=left>
        Recently acq closed requests</a>
    </td>
    <td class=td1 align=left>
        <a href="javascript:replacePage('&server_f?func=bor-acq-
close&days=010');">
        &nbsp;10 days
    </td>
    <td class=td1 align=left>
        <a href="javascript:replacePage('&server_f?func=bor-acq-
close&days=030');">
        &nbsp;30 days
    </td>
    <td class=td1 align=left>
        <a href="javascript:replacePage('&server_f?func=bor-acq-
close&days=060');">
        &nbsp;60 days
    </td>
</tr>

```

bor-include-1, bor-include-2

Immediately after the following lines:

```

ILL Request</a>
</td>

```

Add:

```

<td class="bar" align="center" nowrap>
    <a href="javascript:replacePage('&server_f?func=bor-acq');"
    title="Acq Request" class="blue">
    Acq Request</a>
</td>
<td class="bar" align="center" nowrap>

```

```

        &nbsp;/&nbsp;
    </td>

```

bor-info-no-z305

Immediately after the following line:

```

    &nbsp;$3300

```

```

    </td>

```

```

</tr>

```

Add:

```

<tr>
  <td class=td1 align=left>
    <a href="javascript:replacePage('&server_f?func=bor-acq');">
      Total acq requests</a>
  </td>
  <td class=td1 align=left>
    &nbsp;$5100
  </td>
</tr>
<tr>
  <td class=td1 align=left>
    <a href="javascript:replacePage('&server_f?func=bor-acq-active');">
      Active acq requests</a>
  </td>
  <td class=td1 align=left>
    &nbsp;$5200
  </td>
</tr>

```

full-set-head-bor

Immediately after the following lines:

```

    Save on Server</a>

```

```

    </td>

```

```

    <td class="bar" align="center" nowrap>

```

```

        &nbsp;|&nbsp;

```

```

    </td>

```

Add:

```

    <td class="bar" align="center" nowrap>
      <a href=" &server_f?func=acq-request-
doc&doc_library=$0900&source_doc=$0600"
        title="Create Acq Request" class="blue">
        Acq Request</a>
    </td>
    <td class="bar" align="center" nowrap>
      &nbsp;/&nbsp;
    </td>

```

head-1-bor, head-replace

Minimum changes required:

Immediately after the following lines:

Special Request

</td>

<td class="bottombar" valign="middle" height="20" align="center"

nowrap>

|

</td>

Add:

<td class="bottombar" valign="middle" height="20" align="center"

nowrap>

<a href="&server_f?func=acq-request" class="blue"

title="Acquisition Request for an item not fo

und in the OPAC">

ACQ Request

</td>

Bug fixes**verde-redirect:****Minimum changes required:**

In line #23 replace:

<input type="hidden" name="issue" value="\$150">

with

<input type="hidden" name="issue" value="\$1500">

full-mail, myshelf-course, myshelf-mail, short-mail**Minimum changes required:**

Replace:

\$1000-C"1%23%23%23%23">Author

With

\$\$1000-C"1####">Author

Replace:

\$1000-C"245%23%23">Title

With

\$\$1000-C"245##">Title

Replace:

\$1000-C"300">Pages

With

\$\$1000-C"300">Pages

Replace:

\$1000-C"50%23%23%23">Notes

With

\$\$1000-C"50####">Notes

Replace:

\$1000-C"6%23%23%23%23">Subject

With
\$\$1000-C"6####">Subject

Replace:
\$1000-C"SYS">System Number
With
\$\$1000-C"SYS"> System Number

Replace:
\$1000-C"260%23%23">Imprint
With
\$\$1000-C"260##">Imprint

login-session:

Replace:
<form method=*GET*
With
<form method= "*post*"

booking-page-item-info, item-hold-request-head, item-photo-request-head

Replace:
<a href="&server_f?func=item-global&doc_library=\$0500
&doc_number=\$0600&year=&volume=&sub_library=">

With
**

item-hold-request-head

Immediately after the line:
<input type=hidden name="bib_request" value=\$0800>

Add:
<input type=hidden name="year" value=\$2500>
<input type=hidden name="volume" value=\$2600>
<input type=hidden name="sub_library" value=\$2700>
<input type=hidden name="type" value=\$2800>
<input type=hidden name="no_loaned" value=\$2900>
<input type=hidden name="start_rec_key" value=\$3000>
<input type=hidden name="end_rec_key" value=\$3100>

item-photo-request-head

Immediately after the line:
<input type=hidden name=" item_sequence" value=\$0300>

Add:
<input type=hidden name="year" value=\$2500>

```
<input type=hidden name="volume" value=$2600>
<input type=hidden name="sub_library" value=$2700>
<input type=hidden name="type" value=$2800>
<input type=hidden name="no_loaned" value=$2900>
<input type=hidden name="start_rec_key" value=$3000>
<input type=hidden name="end_rec_key" value=$3100>
```

item-schedule-head

Replace:

```
<a href="&server_f?func=item-global&doc_library=$0500
&doc_number=$0600&year=&volume=&sub_library=">
```

With

```
<a href="&server_f?func=item-
global&doc_library=$0500&doc_number=$0600&year=$25
00&volume=$2600&sub_library=$2700&type=$2800&no_loaned=$2900&s
tart_rec_key=$3000&end_rec_key=$3100">
```

full-999-body-media

Replace:

```
<iframe width=0 height=0 id=XX$0500 title="XX$0500"></iframe>
```

With

```
<iframe frameborder=0 width=0 height=0 id=XX$0500
title="XX$0500"></iframe>
```

short-a-body:

Minimum changes required:

Replace:

```
<iframe width=0 height=0 id=XX$2000 title="XX$2000"></iframe>
```

With

```
<iframe frameborder=0 width=0 height=0 id=XX$2000
title="XX$2000"></iframe>
```

service-sfx-record:

Minimum changes required:

Replace:

```
url += 'sid=metalib:$0300';
```

With

```
url += 'sid=sfx:$0300';
```

Remove:

```
url += '&genre=$0500';
```

sfx-admin, sfx-record, sfx-record-ver-0.1

Remove:

```
url += '&genre=$0500';
```

sfx-record-ver-1.0

Remove:

```
url += 'rft.genre=$0500&'
```

sfx-au:

Minimum changes required:

Replace:

url += 'sid=*metalib_au*:\$0300';

With

url += 'sid=*sfx_au*:\$0300';

Remove:

url += '&genre=\$0500';

sfx-subject:

Minimum changes required:

Replace:

url += 'sid=*metalib_subject*:\$0300';

With

url += 'sid=*sfx_subject*:\$0300';

Remove:

url += '&genre=\$0500';

sfx-title:

Minimum changes required:

Replace:

url += 'sid=*metalib_ti*:\$0300';

With

url += 'sid=*sfx_ti*:\$0300';

Remove:

url += '&genre=\$0500';

group-request-exec-head

Replace:

USMARC ADM (USM50) - Records which were not requested

With:

&f-base - Records which were not requested

booking-page-head

Remove line:

<include>include-window

scan-include-2,scan-include-2-usm10,scan-include-2-usm14,scan-include-2-usm30, scan-include-2-usm90

Remove lines:

```
<a href="javascript:document.form1.reset();">
  onclick="document.form1.scan_start.value=";"
</a>
```


Bug fix to enable non-Latin characters in “My e-Shelf” folder

group-request-head

Immediately after the line:

```
<input type=hidden name="folder" value=$0200>
```

Add:

```
<input type=hidden name="folder_key" value=$2000>
```

myshelf-course

Immediately after the line:

```
<input type=hidden name=folder value=$1200>
```

Add:

```
<input type=hidden name=folder_key value=$2000>
```

myshelf-delete-doc

Immediately after the line:

```
<input type=hidden name="folder_name" value="$0200">
```

Add:

```
<input type=hidden name=folder_key value=$2000>
```

myshelf-delete-folder

Immediately after the line:

```
<input type=hidden name=folder value="$0300">
```

Add:

```
<input type=hidden name=folder_key value=$2000>
```

myshelf-folder-list

Add the place holder:

```
<iframe name="myshelf_folder_left" title="MyShelf left"
SRC="&server_f?func=myshelf-folder-
left&folder=$0100&folder_key=$2000" height="400" width="100%"
border=0 frameborder=0 framespacing=0 scrolling=auto></iframe>
```

myshelf-folder-list-left-body-2

Replace:

```
<span><a
href="javascript:open_window_confirm('&server_f?func=myshelf-
check-del&P03=$0300','myshelf_folder_left');">Delete
Folder</a></span>
```

With:

```
<span><a
href="javascript:open_window_confirm('&server_f?func=myshelf-
check-del&folder_key=$2000','myshelf_folder_left');">Delete
Folder</a></span>
```

Immediately after the line (Note that this line repeats itself 3 times)
<input type=hidden name=folder value="\$0300">

Add (three times):

<input type=hidden name=folder_key value="\$2000">

myshelf-folder-list-left-body-3

Add the place holder:

myshelf-refresh-page

Replace:

window.top.location="&server_f?func=*file&file_name=myshelf-folder-list&P01=\$0100*";

With:

window.top.location="&server_f?func=*myshelf-refresh-page&P01=\$0100&folder_key=\$2000*";

myshelf-short-head-2, myshelf-short-head-2-no-course

Before the placeholder:

&folder=\$1500

Note that the placeholder appears 7 times in each file.

Add:

&folder_key=\$2000

Bug fix to enable the link of network file in full display of records

media-display-exec

Replace

<body onLoad=window.location="\$0100">

With

<body onLoad=*"*window.location='0100'">

Miscellaneous

exlibris.css, exlibris.css.tml:

Minimum changes required:

At the end of the file, add the lines

form

```
{
  display:inline;
}
```

login:

Remove the lines:

```
<!-- The following line (Bobby approved icon) has to be uncommented QA has
performed
the Bobby 4 checks on ALEPH and no Priority 1 errors are found -- Diana.
  <a href="http://bobby.watchfire.com/" title="Bobby's Home Page">
   </a>
-->
```

login-ill

Remove the lines:

```
<a href="http://bobby.watchfire.com/" title="Bobby's Home Page">
 </a>
```

8. General Implementation Notes

8.1. Introduction

This section contains a list of changes related to miscellaneous functions of the system. These changes should be performed manually after running Upgrade Express 18.01 – 19.01. The list does not include changes to Web OPAC files.

8.2. Publishing

The publishing entity (Z00P) Oracle table should have a separate tablespace to for maintenance purposes. If possible, the new tablespace should be on a different physical disk than the already existing ALEPH tablespaces.

Enlarge the redo file from 50MB to 500MB. This should be done by an Oracle DBA. It is recommended that the redo files be on a different physical disk than the tablespaces.

For more information, refer to the *ALEPH Publishing Mechanism* document.

8.3. Course Reading

Perform the following for CRS libraries.

1. Run manage_05 (update direct index) in the Course Reading library (XXX30).

2. Set word indexing, browse indexing (see the *System Librarian Guide* for details).
3. Run manage_01 (update word index), manage_02 (update heading index) and manage_07 (Update Short Bibliographic Records).
4. Set bases in \$alephe_tab/tab_base (See the *OPAC Implementation Notes* for changes to be made to the relevant OPAC file).
5. Run union_01, union_02.
6. Run the following from the command line in order to create the Z127 records:
csh -f \$aleph_proc/create_z127
7. Run util/a/17/6/1 to create the z120/z127 triggers.
8. Run manage_12 at the end of the process with "N" for "Delete all links and "Y" for Check Old Records in the xxx30 library.

For more information regarding the Course Reading module, refer to the *System Librarian Guide*.

9. Upgrade Express Checklist After Upgrade

This checklist is intended to help you test the conversion of data and configuration tables by checking basic functionality in the various modules of the system. After the upgrade process has been completed (including the manual parts of the upgrade), go through the following list and test the specified functions.

General	Confirmed by	Date
Test that jobs run correctly in job_list.		

Cataloging and Items	Confirmed by	Date
Create new record using File → New Record / create a new record using a pre-defined template		
Search for created record in Web and confirm that it is retrieved		
Scan the indexes listed in "find" in the cataloging module and make sure they work		
Search for each of the accesses listed in "scan" in the cataloging module and make sure it works		
Load record from server → modify it → send to server		
Ensure character display of foreign characters and diacritics is correct		
Check authority control functionality		
Check that library can download records from its usual supplier. This will test Z39.50 configuration		
Push the above created record to items		
Add new item.		
In item form, confirm that the drop-down boxes appear correctly		

Acquisitions and Serials	Confirmed by	Date
Open module and do a search and scan		
Search Budget file		
Search Vendors file		
Search Budget transactions per active budget		
Confirm that users can view and modify budgets		
Test EDI functionality		
Push record to Serials module from other modules		
Compare subscription information		
Compare publication schedule forms		
Do “arrive” on an expected issue and confirm that it opens		
View serial items in the Web OPAC		

ILL	Confirmed by	Date
Check borrowing/lending requests summary tree – compare requests from previous ILL to new ILL (numbers, status, bib info, etc).		
Check ILL-Admin-Partner list, potential suppliers, customer ID, APDU Exceptions (number of records, record info, etc)		
Check borrowing requests basic flow for returnable material (request creation, send to supplier, register arrival, return to supplier)		
Check lending requests basic flow for returnable material (request creation, supply material, check-in material)		
Check OPAC-Library card-ILL info (compare previous ILL to new ILL)		

Circulation	Confirmed by	Date
Search for borrowers		
On lower version server create a Loan report (cir-04) or Overdue and lost billing notices (cir-50) report. Compare these results with searches in the Circulation module. A recent report may already exist		
Open new borrower and inform library of number		
Loan the new item you entered to the new borrower		
Test renewal, renew all, return, whatever fine regime is used		
Test overdue/courtesy notice generation		
Compare cash transactions between test server data and production server data of the previous version.		
Activate and check self-check server transactions		
Run p_cir_60 and p_cir_65 in order to check advanced booking function. (Only on test server)		

Web OPAC	Confirmed by	Date
Sign in as the user you entered above		
Confirm that your loan appears correctly as “user” in Web		
Confirm that your information appears in “user” correctly		
Search for the record you created, then click “items” and confirm that you see that it is on loan		
Try keyword and browse searches, in full and in logical bases		
Use basket and e-shelf, e-mail results to yourself		
Check customization generally, menus and navigation links		
Connect to a remote link		
Verify that Course Reading works		
Ensure character display of foreign characters and diacritics is correct		
Verify that related searches (tab_service) are working		
Verify that ‘limit’ functionality works OK		
Check the sorting of records		
Check analytical records for connections between main analytical records and locations		
Test interaction between the Web OPAC and staff client; create an ILL request on the Web OPAC and check the data fed into the GUI, place a hold request, check display of Advanced Booking slots.		

Course Reading	Confirmed by	Date
Open the module and see that the data appears: courses, reading lists, items.		
Make sure that course that had a proxy have the proxy's course number on the course note.		
Compare the existence of courses in the old CR and new CR- use course-06.		
Test Course Management basic flow (new course, update, delete, etc.)		
Compare reading lists in old CR and new CR – use course-01.		
Add document to reading list (by search, catalog new, load file), make sure that it appears in the list.		
Test reading list management basic flow (suppress, remove, edit notes, etc.).		
Connect to OPAC, Course Reading base. Compare Search results to results in old CR: the results should be the same BUT not duplicated.		

Search in GUI Modules	Confirmed by	Date
Search for records via various fields		
Browse for records via various fields		
Add records to navigation map and send to different modules		
Ensure character display of foreign characters and diacritics is correct: Font.ini must have appropriate settings		
Verify that related searches (tab_service) are working		

Z39.50	Confirmed by	Date
Check all Z39.50 targets for standard searches		
Do tables cater correctly for translation of diacritics and foreign characters?		

MetaLib/SFX	Confirmed by	Date
Need to check that ALEPH resource in MetaLib works. Need to check interactions between ALEPH/SFX/MetaLib. Do deep links work correctly? ALEPH as an SFX source. ALEPH as an SFX target.		

X-server	Confirmed by	Date
If library is using X-server, verify that links via X-server are OK		
When all is complete		
Cleanup / Delete data added for testing		
Ask installation team to switch Web port to new version (production server only)		
Verify that archiving is on when going live with version 6 (production server only)		
Verify that library knows how to do backup and that it is working properly.		
Send official letter to library that version 16 data has been uploaded and indexed		

Customers that used Publishing in the former version should check the following:

Publishing	Confirmed by	Date
Configure new set in xxx01/tab/tab_publish		
Run p_publish_04 with the new set.		
Run p_publish_05 on part of the new set		
Run p_publish_06 on new set		

10. Appendix 1 Using the Upgrade Express to Copy the utree and Data

A new option is available for libraries with small databases. It is possible to export the Oracle data from the source machine, pack all the files together (in a tar file) with the whole u-tree, and load the files to the target server (using ftp/sftp).

1. The Upgrade Express utility identifies your current ALEPH version. When running the Upgrade Express from the source version, the following menu is displayed:

```

+-----+
| Upgrade Express Utility 18.01 -> 19.01 Version 1.01 Source |
+-----+

0. Exit
-- 1. Define upgrade parameters
-- 2. Export customer data
-- 3. Transfer customer data to the target location
4. View logfiles

```


2. Define your upgrade parameters using the first option displayed above. In this step, you define the libraries that are upgraded and the e-mail address to which you want to send the results of the export, import, and Upgrade Express utility.

After performing each step the (-) symbols change to (+) symbols.

3. You can choose one of the following options to export the data and u-tree. Each of the options suits a different workflow according to which the library can decide to work (depending on the available servers and the amount of data). Before packing the u-tree, reduce the size of the scratch and print directories as much as possible.

```
+-----+
| Export of Oracle data and u-tree from source machine. |
+-----+
0. Exit
1. Export Oracle data
2. Pack the u-tree
3. Export Oracle data & pack the u-tree in one step
```

There is an option to exclude Z97 & Z98 (since their export/import takes a lot of time). If you want to exclude these, you should run manage_01 after performing the upgrade. The data will be downloaded into the data/ directory of the Upgrade Express.

4. Shutdown ALEPH on the target ALEPH 19. Install Upgrade Express kit on the target. (There is no need to configure the kit). Transfer the data from the source to the target location (v.19) using Upgrade Express Util/3 on the source server (the third option in the first screen above) and review the log files (Upgrade Express Util/4, the fourth option in the first screen above):

```
Transfer customer data
=====

Do you want to continue Y/N: Y
Enter transfer method to sftp/ftp:

Enter target server I.P./hostname: demo-server

Enter root directory on demo-server
[/exlibris/aleph/upgrade_express_1801_1901]:

Enter user name on demo-server [aleph]:

sftp'ng aleph@ demo-server
Enter to continue
Connecting to demo-server...
aleph@ demo-server 's password:
sftp>          sftp>          sftp>          Remote          working          directory:
/exlibris/aleph/upgrade_express_1801_1901/data
```

Note that when both versions are on the same machine, there is no need for FTP. You just log into the server in the target version and run the Upgrade Express from the same location.

5. Note that the Upgrade Express kit menu in the target version (19), looks differently to the one on the source:

```
+-----+
| Upgrade Express Utility 18.01 -> 19.01 Version 1.01 Target |
+-----+

0. Exit
-- 1. Check environment
-- 2. Install customer data
-- 3. Run upgrade express
4. View logfiles

5. View/Update upgrade parameters
6. Backup/Restore Oracle Tables to be Upgraded
7. Store/Restore configuration files
8. Perform Post Upgrade Express Actions
9. Transfer data / configuration files to another server
```

Check the environment (if there is a problem you will not be able to continue). You can ignore the error message “There's no such library ABCXX”. The error will disappear after you install the customer data (u-tree).

6. Select **Install customer data** (Upgrade Express Util/2), the following menu appears:

```
Install customer data
-----
0. Exit
1. Install Oracle data
2. Install the u-tree
3. Install Oracle data and u-tree in one step
```

7. Select option 3 unless you have specifically decided to upload the u-tree and data separately.

In contrast to the workflow described in the [How to Use the Upgrade Express Kit](#) chapter, the new Upgrade Express utility performs the following steps automatically:

1. The data_root is copied from each library (defined in the Upgrade Express) to the Upgrade Express root directory in the data/u18_1 directory. The data from each library is exported together with the table structure and index information. The export file is automatically packed (Tar and Zip).
2. The FTP places the export file in the Upgrade Express installation directory on the target machine.
3. The configuration files configured by the user on the source machine are transferred via FTP (libraries, languages, etc.). You thus do not have to configure these files a second time.

4. The data is uploaded from the target version. The u-tree is unpacked and the following changes are automatically performed:
 - a. The Apache is restored from alephe.orig.
 - b. The links under apache/htdocs are rebuilt (using the create_htdocs_links routine)
 - c. License files and tab_system_statuse are restored from alephe.orig/tab.
 - d. The aleph_startup and aleph_shutdown are restored from alephe.orig.
 - e. The alephe/tab/tab_version is updated with the new version number.

Note that only aleph_start and www_server.conf should be manually changed (before running the upgrade steps).

8. Back up the Oracle tables that will be upgraded (util/6).

9. Run the Upgrade Express utility (util/3).

Proceed to the [Analyzing the Upgrade Express Results](#) chapter on page 13 of this document and follow all the rest of the sections.

10. For customers that have two machines with version 19, the Upgrade Express Util/9 can be used to export the data/u-tree from one machine to another. The menu displays the following options:

```
+-----+
+
| Moving Oracle data and u-tree between servers (same Aleph version)
|
+-----+
+
0. Exit

- On the source machine:
  1. Export Oracle data
  2. Pack the u-tree
  3. Export Oracle data & pack the u-tree in one step
  4. Transfer data by FTP

- On the target machine:
  5. Install Oracle data
  6. Install the u-tree
  7. Install Oracle data and u-tree in one step
```