



Upgrade Express 20.01 to 21.01 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 20.01 **utree** and database is added to the new version, Aleph 21.01. This creates an Aleph 21.01 software environment with 20.01 configuration and data.

It is also possible to upgrade from lower versions, such as v.16 to v.21, without installing v.16, v.17, v.18, and v.20. In this case, a copy of the 16.01 **utree** and database is added to the new version, Aleph 21.01. Minor changes need to be made to allow logging on. After these changes, the upgrade process is executed five times (v.16 to v.17, v.17 to v.18, v.18 to v.19, v.19 to v.20, and v.20 to v.21). It transforms the configuration and data into the Aleph 21.01 format. Such a big jump is only possible if you are not using the Aleph ILL module. If you are using the Aleph ILL module, you need to install and work with v.18 in order to migrate the old ILL data and to setup the new ILL.

Note that when upgrading from a version lower than 21, all the documentation of the previous versions of the Upgrade Express (such as 18 to 19, 19 to 20 and 20 to 21) 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 20.01 to Aleph 21.01 using Upgrade Express.

2. Upgrade Conventions and Requirements

2.1. Conventions

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

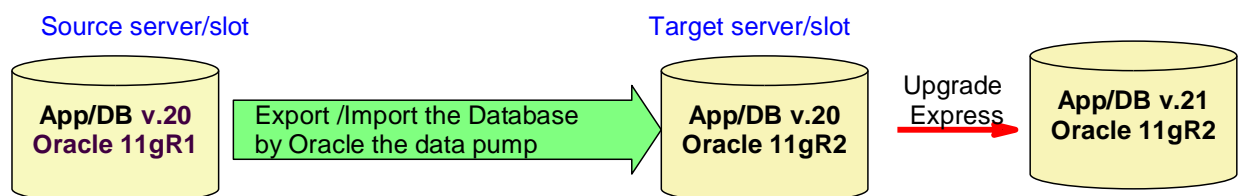
The **source version** is the current Aleph version environment that the customer would like to upgrade. In this document, the source version refers to Aleph 20.01.

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 21.01

2.2. Upgrade Options

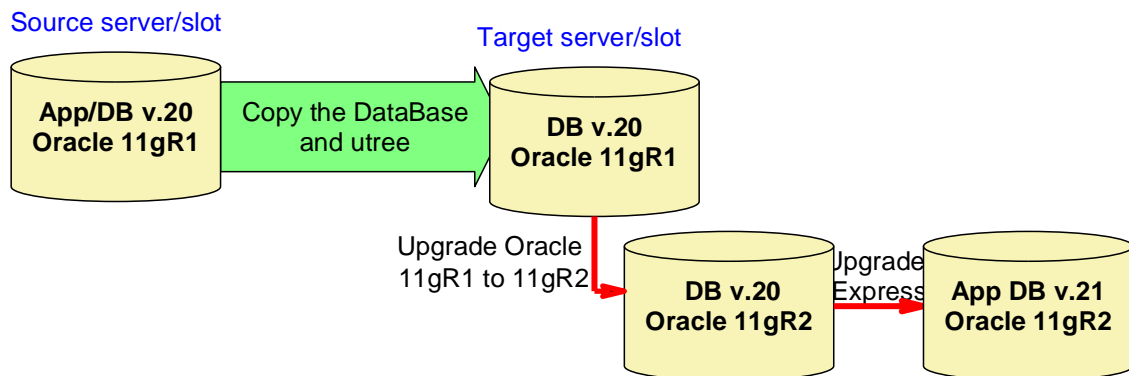
There are three ways in which you can run the Upgrade Express:

- **Option 1**



The UE runs in a separately installed database. If you use this option, then version 21.01 software is installed together with the new database. This option enables you to continue working on the old database while examining the new database, but it requires more downtime and more disk space than option 3. This method can take a long time for larger systems; it is therefore suitable for smaller sites. Data Pump utility is a relatively fast tool, which can export and import the data in a database of 1 million records in 3 hours. Data Pump is the preferred method of data export/import for an upgrade from v.20 to v.21. If you are using the traditional export/import tool, it may take two hours for the export and 20 hours for the import on a database with 1 million bibliographic records. During the traditional export/import, it is also possible to exclude from the import Oracle tables that take a long time to import (Z97 and Z98), and to run p_manage_01 to build these tables on the target after running the Upgrade Express. Before you import the data, make sure that there is the same number of user tablespaces on the target as you have on the source installation.

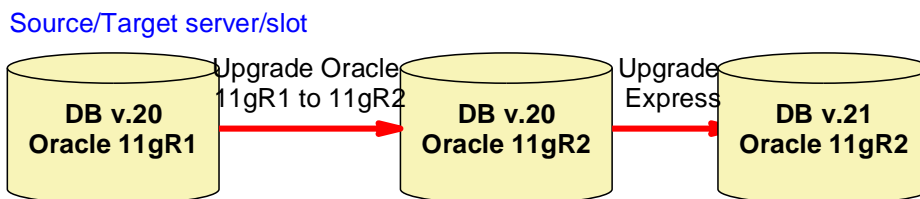
- **Option 2**



The UE runs in a separately installed database. If you use this option, then version 21.01 software is installed together with the new database. This option enables you to continue working on the old database while examining the new database, but it requires more downtime and more disk space than option 3. If you choose this option you need to send the data to the newly installed instance by cloning.

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.)

- **Option 3**



Run the Upgrade Express inside the database. If you use this option, the version 21.01 software is installed in parallel with the version 20.01 software and is connected to the same database as version 20.01. Only one version can be active at any given time (version 20.01 before the upgrade and version 21.01 after the upgrade). Make sure you shut down v.20 before starting up v.21. The advantage of this method is less downtime. The disadvantage is that if the upgrade fails, a restore from backup is required. It is absolutely necessary to perform a full cold backup before the upgrade. You should also have a sound disaster recovery plan in case a restore is required.

Be aware that if you choose this option after running the Upgrade Express, version 20 is no longer available. This is due to the fact that the version 20 database is used by version 21. Therefore, this method, is only suitable for those sites that have a test installation of Aleph, or for those sites that are not currently in production.

Note: During the upgrade of Oracle tables by the UE kit, 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 (this is only relevant to those tables which are going to be modified by the Upgrade Express).

2.3. Prerequisites

Installing the Target Version (21.01)

The first step in the actual upgrade process is the preparation of the target environment. The hardware and operating system requirements for version 20.01 and the size of the customer's database must be taken into account. The installation is scheduled with the local Ex Libris representative. You may be required to complete the *Request for Installation* form.

The target environment can be installed using the AIK (Aleph Installation Kit) for customer self-installation. The AIK is described in the *Aleph Installation Kit* document, located at **Ex Libris Documentation Center > Aleph > Technical Documentation > Version 21 > Installation and Upgrade Information**.

As described in the illustrations above, when the source is Oracle 10, the target is Oracle 11, and you are not using the import/export option, you must upgrade your Oracle database from version 10 to 11. For instructions, refer to the *How to Upgrade an Oracle Database from Version 10 to 11* document.

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 that you choose to use. The standard Upgrade Express method involves downloading the Upgrade Express Kit to the source environment and following the instructions in section [0](#).

Download the Upgrade Express package to the target (21.01) 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
```

```
Ver21up/<password to be obtained from a local representative>
```

```
bin
```

```
get <filename>
```

For example:

```
get upgrade_express_2001_2101.tar.1.01.gz
```

To open the kit:

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

For example:


```
gzip -d upgrade_express_2001_2101.tar.1.01.gz
>>tar -xf <filename>
```

3. Using the Upgrade Express Kit

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 19 to 21), 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.

Note: The upgrade overrides the `$alephe_root/jboss_conf` configuration files. It is possible to restore them with the backup files made during the upgrade. For more information, see [Appendix B – Backup and Restore of jboss_conf](#).

To access the Upgrade Express menu, `upgrade_express_2001_2101` directory by typing the following:

```
cd $ALEPH_MOUNT/upgrade_express_2001_2101
```

Open the Upgrade Express menu by entering the following command:

```
source ./upgrade_util.
```

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 20.01 -> 21.01 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
```

If the Upgrade Express utility identifies your current Aleph version as the Target (such as in option 2 described in section [2 Upgrade Conventions and Requirements](#)) the following menu is displayed:

```
+-----+
| Upgrade Express Utility 20.01 -> 21.01 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 between servers
```

1. Define upgrade parameters

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. 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.

Note:

Although the illsv is defined as a demo library it is used by ILL customers and it is upgraded. Therefore if your library uses illsv you must include it in the definitions so it can be exported.

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

2. Pack library data and configuration tables

```
+-----+
| Upgrade Express Utility 20.01 -> 21.01 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
```

Choose one of the following options to export the data and u-tree.

```
+-----+
| 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
```

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.

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

The data pump option enables you to extract and upload the data faster.

```
Make sure you have cleaned the u-tree as much as possible:
scratch, print, files directories as well as Apache logs.
```

```
Oracle Data Pump extracts and uploads the data faster the regular
exp/imp
```

```
Note: It works only on Oracle 10 and up.
```

```
Before running it for the first time, do the following:
```

```
s+ ALEPH_ADMIN
```

```
grant JAVA_ADMIN to aleph_admin WITH ADMIN OPTION;
```

You may also choose to pack the library data and configuration tables manually. In this case make sure that Aleph is down on the target version (run `$alephe_root/aleph_shutdown`). Copy the complete utree from the source (20.01) to the target (21.01) using the tar command (in order to copy the symbolic links correctly).

Note that the utree delivered with the target installation (21.01) 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).

The following are example of the commands that can be used:

```
cd /exlibris/aleph/
Backup u20_1 tree: mv u21_1/ u21_1.orig/
Tar u20_1 tree: tar -cf u20_1.tar u20_1/
Move u20_1 to u21_1: mv u20_1/ u21_1/
Restore u20_1 tree: tar -xvf u20_1.tar
```

3. Transfer data and perform manual changes

```
+-----+
| Upgrade Express Utility 20.01 -> 21.01 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
```

If you are performing this step from the target server/slot the following screen is displayed:

```
+-----+
| Upgrade Express Utility 20.01 -> 21.01 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 between servers
```

Note that option 9 is used in cases where you want to move data/configuration from between 2 servers which are in the same version.

This utility also updates `tab_version`, `license` and `license.www_x` files, and restores `aleph_startup` and `aleph_shutdown` files supplied with the version.

Manually 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.

When the data is uploaded from the target version, the u-tree is unpacked and the following changes are automatically performed:

Apache is restored from `alephe.orig`. (for detailed explanation regarding this function, see [Appendix A – Copying Apache](#).)

- The links under `apache/htdocs` are rebuilt (using the `create_htdocs_links` routine)
- License files and `tab_system_status` are restored from `alephe.orig/tab`.
- The `aleph_startup` and `aleph_shutdown` are restored from `alephe.orig`.
- The `alephe/tab/tab_version` is updated with the new version number.

All the steps above are performed automatically when using the Upgrade Express utility. For more information, see [Appendix A – Copying Apache](#).

Shutdown Aleph on the target Aleph 21. 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.21) 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_2001_2101]:

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_2001_2101/data
```

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

Note:

The location of exported data is under the "data" directory of the Upgrade Express kit.

4. Importing Demo Libraries

This section is only relevant for the cloned (option 2 described in section [2 Upgrade Conventions and Requirements](#)) database.

Important Note:

Every installation must have one of the following sets of demo libraries: mab, uni, or usm. This demo data is used as the base library for the util g/3 (Create Initial Library Parameters) and by Ex Libris staff and your staff to reproduce problems occurring with your libraries' tables and data.

At this point, the data of the demo libraries is also in the format of the source database (20.01). To replace this data with the demo data supplied by the installation, run the following commands:

1. Download the aleph21 dump file from the ftp:

```
cd /exlibris/ftp_from_exlibris
wget "ftp://ver21:M0zart21@ftp.exlibris.co.il/dpdump/*"
cat aleph21_demo_libs.dmp.gz_* > aleph21_demo_libs.dmp.gz
gzip -d aleph21_demo_libs.dmp.gz
chmod 777 aleph20_demo_libs.dmp
rm aleph21_demo_libs.dmp.gz_??
```

2. Recreate Oracle schemas:

```
dlib usm01
ap
foreach lib ( $DEMO_LIBS )
    create_ora_user_b $lib
end
```

3. Define dumpdir directory:

```
sqlplus ALEPH_DBA/ALEPH_DBA as sysdba
create or replace directory dumpdir AS '/exlibris/ftp_from_exlibris';
GRANT READ,WRITE ON DIRECTORY dumpdir TO ALEPH_ADMIN;
exit
```

4. Execute the import:

```
set DLIBS=`echo $DEMO_LIBS | sed 's/ /,/g'`
set DD=`date +%y%m%d`
impdp $ALEPH_ADMIN schemas=$DLIBS DIRECTORY=dumpdir
DUMPFIL=aleph21_demo_libs.dmp LOGFILE=aleph21_libs.$DD.log \
>& /tmp/impdp_demo_libs.log &
```

Note that this process can take around 1-2 hours, depending on the capacity of the server.

Notes

- VIR01 is normally a DEMO library. If the Demo libraries importing is being done on a server where customer data has already been loaded and is in use, then Aleph (or at least the `pc_server` and `www_server`) should be shut down while the importing is running, in order to avoid conflicts in the use of the `vir01` tables.
- If your `usr_library` and/or `pw_library` in `aleph_start` is set to `USR00`, this process will delete your patron and/or password data. (It is our strong recommendation that the `USR00` not be used as your `usr_library` or `pw_library`.)

5. View/Update Upgrade Parameters and Check Environment

Before performing "6. Backup/Restore Oracle Tables to be Upgraded" and "3. Run upgrade express" confirm that all of your libraries are specified so that Upgrade Express runs only on the libraries specified there. To specify the libraries, select "5. View/Update upgrade parameters".

6. Back Up the Oracle Tables

```

+-----+
| Upgrade Express Utility 20.01 -> 21.01 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 between servers

```

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

To backup the tables:

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 20.01 – 21.01 Upgrade Express process: Z30H, Z13, Z108, Z106, Z303, Z304, Z305, Z308, Z35, Z30, Z16, Z20, Z31, Z601, Z76, Z77, Z78, Z501, Z69, Z68, Z70, Z36, Z36H, Z37, Z37H, Z38, Z08, Z309, Z34, Z403, Z700 and Z72.

The following new Oracle tables are added by the 20.01 – 21.01 Upgrade Express process: Z38H, Z900, Z07p, Z307, Ze02 (for ELIB region only), Z69 (Course reading) and Z106 (Course reading),.

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 is sent when the restoration has been completed.

7. 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 and 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 is performed for each defined language. The languages are defined during the configuration stage. Each language has a separate directory under `upgrade_express_2001_2101/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_2001_2101/conf/general` directory.

8. Run 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.

## 9. 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_2001_2101`. 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, 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's (21.01) 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.

[Section 6 Step Descriptions](#) contains a detailed description of the configuration changes performed by the upgrade kit. If the the error message "The file can not be upgraded automatically. Merge manually!" is displayed, see section [6 Step Descriptions](#) to see what change was introduced to the file in v.21.

For information on how to save modified files so that potential subsequent upgrade runs do not override these files, see section [4.1 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 section [6.2 Changes in Configuration Files](#).

### 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 menu.

```
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. Synchronize pcb files
7. Synchronize 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 required).
- Perform Util O/7/3 to see if Archiving is on. If not, turn it on with Util O/7/1 (Although this step is not in the menu above, it is required).

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

Run Util a/17/6/4 to verify that the triggers used by the system are enabled.

**Note:** When upgrading two separate packages, restart the server and run Upgrade Express processes only after the second package upgrade. For example, if you are upgrading from 19.01 to 20.01 and then from 20.01 to 21.01, 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

```
+-----+
| Upgrade Express Utility 20.01 -> 21.01 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 between servers
```

All configuration files that are modified during the Upgrade Express process must be saved in a separate location; otherwise, subsequent upgrade runs override them. The Upgrade Express package has a mechanism for storing files that have been modified during the process.

```
Store/View/Restore Configuration Files

Storage directory is:
/exlibris/aleph/kit.21.01/upgrade_express_2001_2101/./upgrade_express_2001_2101.store
```

```
0. Exit
1. Add files to store
2. View list of stored files
3. Create a report of differences
4. Restore files from
/exlibris/aleph/kit.21.01/upgrade_express_2001_2101/./upgrade_express_2001_2101.store
```

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

**Note:** The upgrade saves also the `$alephe_root/jboss_conf/` configuration files. For more information about restoring, see [Appendix B – Backup and Restore of jboss\\_conf](#).

## 4.2. Aleph 21 and JBoss 5

Aleph version 21 is working with the new JBoss version 5. The new Jboss 5 is part of version 21 installation.

During version 21 installation, the old ng tree will be replaced in order to match the new Jboss.

As a result, External adapters (JAR files) in old “ng” tree (if used), should be copied manually to version 21 ng tree.

If you configured your own vendor’s information for the SMSProxy, copy SmsProxyConf.xml file from v.20 “ng” tree to v.21 “ng” tree. (File path is: `./ng/aleph/home/system/conf/`).

## 4.3. 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 20.01 to 21.01 does not add new setup files or make changes in setup files unless these changes are mandatory. For instruction regarding changes in setup files that are not mandatory, refer to the Release Notes document.

## 4.4. 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 errors, 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 21.01 GUI installation program includes the option of upgrading your current GUI. This means that setup parameters (\*.ini files) from your older version clients are copied to the new 21.01 clients and synchronized, minimizing the need to customize the new GUI. To apply the upgrade program, 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 21.01 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 synchronizes the 21.01 installation with special

changes (for example, formats and names changes) that were done in previous versions.

## 6. Step Descriptions

### 6.1. Introduction

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 Files

\*\*\*\*\*

Step 1 - Description:

Create ./[usr\_lib]/tab/tab\_patron\_log.lng table in the USR library.

\*\*\*\*\*

\*\*\*\*\*

Step 2 - Description:

Create ./[course\_lib]/tab/tab\_event.{lng} table in the Course Reading library.

\*\*\*\*\*

\*\*\*\*\*

Step 3 - Description:

Changed the following XSL files in BIB libraries:

1. ./[bib\_libs]/form\_{lng}/plain-funcs-grid.xsl:

Add the following lines after the section "display-grid-gen" :

```
<xsl:template name="display-grid-currency">
 <xsl:param name="value"/>
 <xsl:param name="type"/>
```

```

<xsl:param name="label"/>
<xsl:param name="header"/>
<xsl:param name="style"/>
<xsl:param name="check-value"/>
 <xsl:if test="$header =" and $label != "">
 <xsl:value-of select="$label"/>: <xsl:value-of select="$value"/>
 <xsl:call-template name="new-line"/>
 </xsl:if>

</xsl:template>

```

2. ./[bib\_libs]/form\_{lng}/plain-funcs-misc.xsl:

Replace the following lines:

```

<xsl:template name="checkbox">
 <xsl:param name="text"/>
 <form>
 <xsl:call-template name="table-open"/>
 <xsl:call-template name="table-start-row"/>
 <td width = "20%">
 <xsl:value-of select="$text"/></td>
 <td>
 <input type="checkbox"/>
 </td>
 <xsl:call-template name="table-end-row"/>
 <xsl:call-template name="table-close"/>
 </form>
</xsl:template>

```

With:

```

<xsl:template name="checkbox">
 <xsl:param name="text"/>
 <xsl:value-of select="$text"/>
 <xsl:text> __ </xsl:text>
 <xsl:call-template name="new-line"/>
</xsl:template>

```

\*\*\*\*\*

Step 4 - Description:

The following XSL, TRN and HTML files are new files (ADM libraries):

- ./[adm\_libs]/form\_{lng}/item-hol-doc-cleanup.xsl
- ./[adm\_libs]/form\_{lng}/requests-report.xsl
- ./[adm\_libs]/form\_{lng}/cash-ship-invoice.xsl
- ./[adm\_libs]/form\_{lng}/hold-refused-letter-s.xsl
- ./[adm\_libs]/form\_{lng}/photocopy-refused-letter-s.xsl
- ./[adm\_libs]/form\_{lng}/booking-refused-letter-s.xsl
- ./[adm\_libs]/form\_{lng}/bor-history-hold-list-00

./[adm\_libs]/form\_{lng}/patron-change-report.xml  
./[adm\_libs]/form\_{lng}/patron-change-report.trn

\*\*\*\*\*  
\*\*\*\*\*

#### Step 5 - Description:

The following XSL files were updated (ILL libraries):

1) ./[ill\_libs]/form\_{lng}/plain-funcs-address.xml

The following lines were added:

```
<xsl:template name="ill-unit-address">
 <xsl:value-of select="//ill-unit-address-1-occ1"/><xsl:call-template name="new-
line"/>
 <xsl:value-of select="//ill-unit-address-1-occ2"/><xsl:call-template name="new-
line"/>
 <xsl:value-of select="//ill-unit-address-1-occ3"/><xsl:call-template name="new-
line"/>
 <xsl:value-of select="//ill-unit-address-1-occ4"/><xsl:call-template name="new-
line"/>
 <xsl:value-of select="//ill-unit-address-1-occ5"/><xsl:call-template name="new-
line"/>
 <xsl:value-of select="//ill-unit-address-1-occ6"/><xsl:call-template name="new-
line"/>
 <xsl:value-of select="//ill-unit-address-1-occ7"/><xsl:call-template name="new-
line"/>
</xsl:template>
```

Before the line:

```
</xsl:stylesheet>
```

2) ./[ill\_libs]/form\_{lng}/ill-patron-letter-3.xml

Changed from:

```
<xsl:call-template name="generic-line">
<xsl:call-template name="ill-unit-address"/>
```

To:

```
<xsl:call-template name="ill-unit-address"/>
<xsl:call-template name="generic-line">
```

\*\*\*\*\*

#### Step 6 - Description:

Add the following lines to \$alephe\_tab/user\_function.LNG

|               |                         |                |                                                                   |
|---------------|-------------------------|----------------|-------------------------------------------------------------------|
| REQUESTS-S    | L Requests Services     | CIR-26         | L CIR-26 Send Letter for Hold Requests                            |
| WWW-X         | L X-SERVER Interface    | CIRC-STAT-M    | L Circulation status (Multi)                                      |
| ITEM-UPDATE-S | L Item Updates Services | ITEM-12        | L ITEM-12 Clean HOL from item                                     |
| OBJECT-S      | L Object Services       | ADAM-08        | L ADAM-08 Create Digital Objects Upload File from DigiTool Export |
| REQUESTS      | L Circulation Requests  | PHOTO-SHIPPING | L Photocopy request - Ship                                        |
| RECORD-S      | L Record Services       | MANAGE-46      | L MANAGE-46 Add Subj. Headings from AUT                           |
| PATRON-S      | L Patron Services       | CIR-27         | L CIR-27 Patron Record Log Changes Report                         |

Remove the following line from \$alephe\_tab/user\_function.LNG:

|        |                    |         |                       |
|--------|--------------------|---------|-----------------------|
| LOAD-S | L Loading Services | FILE-97 | L FILE-97 RLIN Loader |
|--------|--------------------|---------|-----------------------|

\*\*\*\*\*  
\*\*\*\*\*

Step 7 - Description:

Update \$alephe\_root/aleph\_startup file:

Changed from:

```

if ($NCIP_SERVER_STARTUP == "Y") then
 echo "starting ncip_server..."
 csh -f $aleph_proc/ncip_server \
 $_ncip_server_port >& /dev/null &
 echo " "
endif

```

To:

```

if ($?NCIP_STARTUP_LIBS) then
 echo "starting ncip_server..."

 @ n = $_ncip_server_port
 foreach lib ($NCIP_STARTUP_LIBS)
 start_proc00 $lib
 echo " - $active_library"
 csh -f $aleph_proc/ncip_server $n >& /dev/null &
 @ n ++
 end
 echo ""
endif

```



\*\*\*\*\*

\*\*\*\*\*

Step 8 - Description:

Change the following tables in \$alephe\_tab:

\$alephe\_tab/tab\_ncip\_interface

Changed from:

!  
! AcceptItem  
!  
1 /UniqueRequestId/RequestIdentifierValue  
2 ncip\_requestidentifiervalue

To:

!  
! AcceptItem  
!  
1 /UniqueRequestId/UniqueAgencyId/Scheme  
2 "NCIP Unique Agency Id"  
1 /UniqueRequestId/UniqueAgencyId/Value  
2 "Exlibris Items Agency"  
1 /UniqueRequestId/RequestIdentifierValu  
2 ncip\_requestidentifiervalue

\*\*\*\*\*

Step 9 - Description:

Added the following line to ./[adm\_libs]/tab/pc\_tab\_exp\_field.lng:

OBJECT-CHAR-SET      L UTF-8                                  utf8

\*\*\*\*\*

\*\*\*\*\*

Step 10 - Description:

Add the following line to ./[adm\_library]/tab/tab\_z105:

UPDATE-DOC      h XXX30

\*\*\*\*\*

Step 12 - Description:

Update the file \$alephe\_root/aleph\_start:

1) Add the following line before the "exit" line at the end of the file:

```
setenv PATH "${PATH}:/etc"
```

2) Remove mab01 from RLIN\_STARTUP\_LIBS

```


```

Step 13 - Description:

New 2nd column (default ##) was added in  
./<ILL library>/tab/ill\_lend\_charge.

```

```

```

```

Step 14 - Description:

Add new configuration table - \$alephe\_tab/z111\_index

```

```

```

```

Step 15 - Description:

Create ./[course\_lib]/tab/tab33.{lng} table in the Course Reading library.

```


```

Step 16 - Description:

Create ./[adm\_lib]/tab/tab\_z38\_sort table in the ADM library.

```


```

Step 17 - Description:

Added the following new files into ./alephe/www\_f\_<lng>:

1. item-photo-request-tail-an
2. item-photo-request-details
3. csrf-validation
4. preview-file-body
5. preview-file-head
6. preview-file-tail
7. bor-history-hold-head
8. bor-history-hold-body
9. bor-history-hold-tail
10. bor-history-hold-no-hold
11. bor-history-hold-exp

## 12.bor-history-hold-exp-head

\*\*\*\*\*  
\*\*\*\*\*

### Step 18 - Description:

Added the new XSL and TRN files in BIB libraries:

```
./[bib_libs]/form_{lng}/reading-room-item-slip.xsl
./[bib_libs]/form_{lng}/reading-room-item-slip.trn
```

\*\*\*\*\*  
\*\*\*\*\*

### Step 19 - Description:

Changed the following XSL and TRN files in ADM libraries:

1) ./[adm\_libs]/form\_{lng}/acq-claims-by-vendor.xsl

Replace the following line:

```
<xsl:with-param name="line" select='concat("##-----
")'/>
```

with the line:

```
<xsl:with-param name="line" select='concat("##-----
, "", "")'/>
```

2) ./[adm\_libs]/form\_{lng}/global.trn

\*\*\*\*\*

\*\*\*\*\*

### Step 20 - Description:

The following XSL files were updated (ILL libraries):

- 1) ./[ill\_libs]/form\_{lng}/ill-patron-letter-0.xsl
- 2) ./[ill\_libs]/form\_{lng}/ill-patron-letter-2.xsl
- 3) ./[ill\_libs]/form\_{lng}/ill-patron-letter-3.xsl
- 4) ./[ill\_libs]/form\_{lng}/ill-patron-letter-4.xsl
- 5) ./[ill\_libs]/form\_{lng}/ill-patron-letter-5.xsl
- 6) ./[ill\_libs]/form\_{lng}/ill-patron-letter-6.xsl
- 7) ./[ill\_libs]/form\_{lng}/ill-patron-letter-a.xsl
- 8) ./[ill\_libs]/form\_{lng}/ill-patron-letter-c.xsl
- 9) ./[ill\_libs]/form\_{lng}/ill-patron-letter-i.xsl

For all files the following lines were added:

```

<xsl:call-template name="display-gen">
 <xsl:with-param name="label" select="Received Note:"/>
 <xsl:with-param name="value" select="./received-note"/>
</xsl:call-template>

```

After:

```

 <xsl:with-param name="value" select="./letter-note"/>
</xsl:call-template>

```

```


```

### Step 21 - Description:

1. Add the following lines to ./[adm\_libs]/tab/pc\_tab\_col.lng

```

PC_CIR_B_PHOTO_LIST L Sub Library 06 010 04 C04 Sub Library
PC_CIR_B_PHOTO_LIST L Pickup Location 07 010 04 C04 Pickup
Location
PC_CIR_B_PHOTO_LIST L Requester Name 08 000 04 C04 Requester
name
!*
!* Circulation - Patron Photo Request History List
!*
PC_CIR_B_PHOTOH_LIST L Doc No. 01 000 04 C04 Document No
PC_CIR_B_PHOTOH_LIST L Bibliographic Info 02 050 04 C04 BIB Doc
Heading
PC_CIR_B_PHOTOH_LIST L Date 03 025 04 C04 Open Date
PC_CIR_B_PHOTOH_LIST L No. 04 010 04 C04 Photo #
PC_CIR_B_PHOTOH_LIST L Status 05 015 04 C01 04 C06 Status
PC_CIR_B_PHOTOH_LIST L Requester Name 06 000 04 C04 Requester
Name
!*
!* Circulation - Refuse Hold Request List
!*
PC_CIR_REF_HOLD_LIST L Patron Name 01 030 04 C04 username
PC_CIR_REF_HOLD_LIST L Patron ID 11 020 04 C04 Patron ID
PC_CIR_REF_HOLD_LIST L Req Date 02 020 04 C04 request date
PC_CIR_REF_HOLD_LIST L Pickup 03 020 04 C04 pickup location
PC_CIR_REF_HOLD_LIST L Status 04 025 04 C01 04 C06 status
PC_CIR_REF_HOLD_LIST L Note 1 05 000 04 C04 note 1
PC_CIR_REF_HOLD_LIST L Note 2 06 000 04 C04 note 2
PC_CIR_REF_HOLD_LIST L Priority 07 010 04 C04 priority
PC_CIR_REF_HOLD_LIST L Proxy 08 005 it map Proxy
PC_CIR_REF_HOLD_LIST L Proxy ID 09 000 04 C04 Proxy ID
PC_CIR_REF_HOLD_LIST L Proxy Name 10 000 04 C04 Proxy Name
PC_CIR_REF_HOLD_LIST L End Req 12 015 04 C04 End Request
Date
PC_CIR_REF_HOLD_LIST L Hold Date 13 020 06 C06 Hold Date

```

```

!*
!* Circulation - Refuse Booking Request List
!*
PC_CIR_REF_BOOK_LIST L Patron Name 01 030 04 C04 username
PC_CIR_REF_BOOK_LIST L Patron ID 11 020 04 C04 Patron ID
PC_CIR_REF_BOOK_LIST L Req Date 02 020 04 C04 request date
PC_CIR_REF_BOOK_LIST L Pickup 03 020 04 C04 Pickup Location
PC_CIR_REF_BOOK_LIST L Open Date 14 000 04 C04 Open Date
PC_CIR_REF_BOOK_LIST L Status 04 025 04 C01 04 C06 status
PC_CIR_REF_BOOK_LIST L Note 1 05 000 04 C04 note 1
PC_CIR_REF_BOOK_LIST L Note 2 06 000 04 C04 note 2
PC_CIR_REF_BOOK_LIST L Booking Start Date 15 000 04 C04 Booking
Start Date
PC_CIR_REF_BOOK_LIST L Booking End Date 16 000 04 C04 Booking
End Date
PC_CIR_REF_BOOK_LIST L Booking Start Hour 17 000 04 C04 Booking
Start Hour
PC_CIR_REF_BOOK_LIST L Booking End Hour 18 000 04 C04 Booking
End Hour
PC_CIR_REF_BOOK_LIST L Priority 07 010 04 C04 priority
PC_CIR_REF_BOOK_LIST L Proxy 08 005 it map Proxy
PC_CIR_REF_BOOK_LIST L Proxy ID 09 000 04 C04 Proxy ID
PC_CIR_REF_BOOK_LIST L Proxy Name 10 000 04 C04 Proxy Name
!*
PC_SERIAL_GROUPS_ORD L No. Items. 01 015 01 C01
PC_SERIAL_GROUPS_ORD L Arrived 02 015 01 C01
PC_SERIAL_GROUPS_ORD L Expected 03 015 01 C01
PC_SERIAL_GROUPS_ORD L Desc. 04 035 01 C01
PC_SERIAL_GROUPS_ORD L Order No. 05 015 01 C01
PC_SERIAL_GROUPS_ORD L Order Unit 06 035 01 C01
PC_SERIAL_GROUPS_ORD L Vendor 07 030 01 C01
PC_SERIAL_GROUPS_ORD L ACQ Method 08 015 01 C01
!*
PC_CIR_LOGGER L Request Number 11 000 01 C04 Z309-REQUEST-
NUMBER
PC_CIR_B_HOLD_LIST L Requester Name 21 000 04 C04 Requester
name
PC_COM_HOLD_H_LIST L Requester Name 11 000 04 C04 Requester
Name
PC_COM_HOLD_H_LIST L Status 12 010 04 C04 Request Status
PC_CASH_SUMMARY L Requester Name 22 000 04 C04 Requester
Name
PC_CASH_SUMMARY L Note 23 000 it map Cash Note

```

2. Replace the following line:

```

PC_CIR_B_PHOTO_LIST L Bibliographic Info 02 050 04 C04 BIB Doc
Heading

```

With:

PC\_CIR\_B\_PHOTO\_LIST L Bibliographic Info 02 030 04 C04 BIB Doc  
Heading

\*\*\*\*\*

Step 22 - Description:

The following changes were done to ./[adm\_libs]/tab/pc\_tab\_exp\_field.lng:

1) Adding the following lines:

```
ITEM-DEPOSITORY-ID-2 L Remote Storage-1 HDEP
ITEM-DEPOSITORY-ID-2 L Remote Storage-2 X
!*
PHOTO-PAPER-SIZE L A4 A4
!*
PHOTO-SORT-TYPE L Photocopy No PHOTO-1
PHOTO-SORT-TYPE L Sublib/Req name/Number PHOTO-2
PHOTO-SORT-TYPE L Pickup/Sublib/Req name/number
PHOTO-3
PHOTO-SORT-TYPE L Pickup/Status/Req name/number
PHOTO-4
PHOTO-SORT-TYPE L Sublib/Status/Req name/number PHOTO-
5
PHOTO-SORT-TYPE L Pickup/Sublib/Status/Req name/number
PHOTO-6
PHOTO-SORT-TYPE L Pickup/Status/Sublib/req name/number
PHOTO-7
PHOTO-SORT-TYPE L Pickup/Req name/number PHOTO-8
```

2) Replace the line:

```
COURSE-COPYRIGHT L Open use with copyright display N
```

With:

```
COURSE-COPYRIGHT L Open use with copyright display
```

\*\*\*\*\*

Step 23 - Description:

Update \$alephe\_tab/user\_function.LNG with the following changes:

1) Replace the line:

```
INVOICING L Invoicing INVOICE-LIST L Invoices -
Display list of line items
```

With:

```
INVOICING L Invoicing INVOICE-LIST L Order-Display
list of invoice line items
```

2) Replace the lines:

|                      |                    |         |                 |
|----------------------|--------------------|---------|-----------------|
| BINDING-S            | L Binding Services | BIND-04 | L BIND-04 Print |
| Bind Alert Report    |                    |         |                 |
| BINDING-S            | L Binding Services | BIND-14 | L BIND-14 Print |
| Serial Binding Slips |                    |         |                 |

With:

|                      |                    |         |                 |
|----------------------|--------------------|---------|-----------------|
| BINDING-S            | L Binding Services | BIND-01 | L BIND-01 Print |
| Bind Alert Report    |                    |         |                 |
| BINDING-S            | L Binding Services | BIND-02 | L BIND-02 Print |
| Serial Binding Slips |                    |         |                 |

3) Replace the line:

|                                        |                           |           |   |
|----------------------------------------|---------------------------|-----------|---|
| COURSE-READING-S                       | L Course Reading Services | COURSE-05 | L |
| COURSE-05 Reserve Reading Items Report |                           |           |   |

With:

|                             |                           |           |   |
|-----------------------------|---------------------------|-----------|---|
| COURSE-READING-S            | L Course Reading Services | COURSE-05 | L |
| COURSE-05 Course Not Active |                           |           |   |

4) Replace the line:

|                             |                    |         |                |
|-----------------------------|--------------------|---------|----------------|
| LOAD-S                      | L Loading Services | FILE-94 | L FILE-94 Send |
| MARC records to OCLC server |                    |         |                |

With:

|                          |                    |         |                   |
|--------------------------|--------------------|---------|-------------------|
| LOAD-S                   | L Loading Services | FILE-94 | L FILE-94 Produce |
| Report for Loader Logger |                    |         |                   |

\*\*\*\*\*  
 \*\*\*\*\*

Step 24 - Description:

Update the file \$alephe\_tab/send\_mail.

Replace the line:

```
echo "Subject: =?ISO-8859-1?Q?$2?=" >> $TMPDIR/send_mail.$$
```

With the lines:

```
if ("$2" == "") then
 echo "Subject:" >> $TMPDIR/send_mail.$$
else
 echo "Subject: =?ISO-8859-1?Q?$2?=" >> $TMPDIR/send_mail.$$
endif
```

\*\*\*\*\*  
 \*\*\*\*\*

Step 25 - Description:

In the file [adm\_library]/pc\_display\_lng/item-history-expand:  
Replace all occurrences of the line:

CONDITION 85x-type

With:

CONDITION field-85x-type

```


```

Step 26 - Description:

Update the file \$alephe\_root/aleph\_shutdown:

1) Replace the following section:

```
in case one of the process, e.g. ue_08, didn't finish yet.
@ number_of_wait = 3
@ wait_loop = 0
wait:
aleph_ps exist $aleph_exe
set pid = ` $aleph_exe/get_symbol aleph_ps`
if (($pid != 0) && ($wait_loop < $number_of_wait)) then
 sleep 20
 @ wait_loop++
 goto wait
endif

if ($wait_loop == $number_of_wait) then
 echo "Shutdown did not complete: the following processes are still running"
 aleph_ps show $aleph_exe
 goto exit
endif
```

With the following:

```
in case one of the process, e.g. ue_08, didn't finish yet.
@ number_of_wait = 12
@ wait_loop = 0
wait:
aleph_ps exist $aleph_exe
set pid = ` $aleph_exe/get_symbol aleph_ps`
if (($pid != 0) && ($wait_loop < $number_of_wait)) then
 sleep 10
 @ wait_loop++
 goto wait
endif
```



```

if ($pid != 0) then
 echo "Shutdown did not complete: the following processes are still running"
 aleph_ps show $aleph_exe
 goto exit
endif

```

2) Move the above section to be after the following line:

```
grep shutdown.sh jboss_shutdown.sh | bash -s
```

```


```

Step 27 - Description:

Changed the following files in \$alephe\_unicode:

1) mab\_to\_unicode - Replace the following lines:

```

DE FE22 #Doppelbogen, 2. Teil
DE FF FE22 #Eintrag nicht entfernen
DF FE21 #Doppeltilde, 2. Teil
DF FF FE21 #Eintrag nicht entfernen

```

With:

```

DE FE21 #Doppelbogen, 2. Teil
DE FF FE21 #Eintrag nicht entfernen
DF FE23 #Doppeltilde, 2. Teil
DF FF FE23 #Eintrag nicht entfernen

```

2) unicode\_to\_mab - Add the following lines:

```

FE20 DD #Doppelbogen, 1. Teil
FE21 DE #Doppelbogen, 2. Teil
FE22 DD #Doppeltilde, 1. Teil
FE23 DF #Doppeltilde, 2. Teil

```

```

```

```

```

Step 28 - Description:

Add the following line to ./[ill\_lib]/tab/tab46.{lng}:

```
84 Y N LILL_10 Send Failed
```

```


```

Step 29 - Description:

1. Remove the following line from \$alephe\_root/error\_lng/check\_doc:  
9104 L Subfield o can only be used in 854 and 855 fields.
  
2. Remove the following line from \$alephe\_root/error\_lng/xml\_update\_doc:  
9104 Subfield o can only be used in 854 and 855 fields.- \$1 error
  
3. In file \$alephe\_root/error\_lng/slnp\_server, replace the following line:  
0034 0000 L No items available for the ILL request (Reason: \$1, Note: \$2).

With:  
0034 0000 L No items available for the ILL request (Reason: \$1, Note: \$2\$3\$4).

4. In file \$alephe/error\_lng/www\_f\_heading, replace the following line:  
6501 L Renew succeeded.

With:  
6501 L Renewal request sent and waiting for supplier's approval.

5. In file ./aleph/error\_eng/pc\_serial\_c0309, replace the following lines:  
0207 0026 L Invalid Item Process Status  
0208 0022 L Invalid Item Status

With:  
0207 0036 L Invalid Item Process Status  
0208 0010 L Invalid Item Status

\*\*\*\*\*  
\*\*\*\*\*

Step 30 - Description:

Add the following line to ./[adm\_lib]/tab/tab\_events.{lng}:

- 83 N Photocopy status changed to "Waiting"
- 84 N Photocopy status changed to "Filled"
- 85 N Photocopy status changed to "Supplied"
- 86 N Photocopy status changed to "Refused"
- 87 N Photocopy status changed to "Deleted"

\*\*\*\*\*  
\*\*\*\*\*

Step 31 - Description:

The following lines were added to ./[crs\_libs]/tab/pc\_tab\_exp\_field.lng:

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

! Filters & sort in Task Manager -> Batch Log screen:

|                  |                    |    |
|------------------|--------------------|----|
| 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    |

\*\*\*\*\*

Step 32 - Description:

Added the following new files in ADM libraries:

```
./[adm_libs]/pc_display_{lng}/booking-request-info
./[adm_libs]/pc_display_{lng}/booking-request-info.trn
```

\*\*\*\*\*

Step 33 - Description:

Add the following lines to ./[adm\_lib]/tab/tab\_circ\_log.{lng}:

```
64 Y Y LRefusal Hold Request note
65 Y Y LRefusal Photocopy Request note
66 Y Y LRefusal Booking Request note
```

\*\*\*\*\*

Step 34 - Description:

In ./[ADM\_LIBRARY]/tab/tab\_check\_circ:

- 1) Copy the section "RENEW-WWW" to a new section "RENEW-PRE"
- 2) Remove from "RENEW-PRE" section lines containing the routines check\_circ\_1\_d, check\_circ\_9\_a, and check\_circ\_10\_a

\*\*\*\*\*

\*\*\*\*\*

Step 35 - Description:

In ./[ADM\_LIBRARY]/tab/tab18.lng:

Change 'Activate' column to 'Z' When:

- 1) ZERO-FINE-HANDLING in ./[ADM\_LIBRARY]/tab/tab100 is 'N' (or not defined)
- 2) Transaction number(column 1) is '0003' or '0014'
- 3) 'Activate'(column 5) is 'Y'

\*\*\*\*\*

\*\*\*\*\*

Step 36 - Description:

1. Added new icon files:

./alephe/www\_f\_lng/icon/f-check-mark-1.gif

./alephe/www\_f\_lng/icon/f-check-mark-2.gif

2. Added configuration to \$alephe\_root/www\_server.conf and

\$alephe\_root/www\_server.conf.tml to use the new icon:

```
setenv www_f_check_mark "<img src=&icon_path/f-check-mark-2.gif border=0
alt='submitted a hold request'>"
```

\*\*\*\*\*

\*\*\*\*\*

Step 1000 - Description:

1. Add New Oracle table Z07P (Ongoing updating of repository for Publishing) in Course Reading library.

2. Add new Oracle index z07p\_id1 in BIB and AUT libraries.

\*\*\*\*\*

\*\*\*\*\*

Step 1001 - Description:

Add New Oracle table Z69 (OPAC events) in Course Reading library.

\*\*\*\*\*

\*\*\*\*\*

Step 1002 - Description:

Add New Oracle table Z106 (CAT fields) in Course Reading library.

\*\*\*\*\*

\*\*\*\*\*

Step 1003 - Description:

Added field Z13\_UPD\_TIME\_STAMP to Z13 in ALL libraries.

NOTE: Upgrading Z13 table in vir01 library need to be done using upgrade\_util->4->2, Clear VIR sessions (util-x-8) function.

\*\*\*\*\*  
\*\*\*\*\*

Step 1004 - Description:

Added field Z108\_UPD\_TIME\_STAMP to Z108 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1005 - Description:

Added field Z106\_UPD\_TIME\_STAMP to Z106 in ALL libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1006 - Description:

Added field Z303\_UPD\_TIME\_STAMP to Z303 in USR library.

\*\*\*\*\*  
\*\*\*\*\*

Step 1007 - Description:

Added field Z304\_UPD\_TIME\_STAMP to Z304 in USR library.

\*\*\*\*\*  
\*\*\*\*\*

Step 1008 - Description:

Added field Z305\_UPD\_TIME\_STAMP to Z305 in USR and ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1009 - Description:

Added field Z308\_UPD\_TIME\_STAMP to Z308 in USR library.

\*\*\*\*\*  
\*\*\*\*\*  
\*\*\*\*\*

Step 1010 - Description:

Added the fields Z35\_UPD\_TIME\_STAMP and Z35\_IP\_ADDRESS\_V6 to Z35 in ADM, BIB & illsv libraries.

\*\*\*\*\*  
\*\*\*\*\*

\*\*\*\*\*

Step 1011 - Description:

Added the fields Z30\_UPD\_TIME\_STAMP and Z30\_IP\_LAST\_RETURN\_V6 to Z30 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1012 - Description:

Added field Z16\_UPD\_TIME\_STAMP to Z16 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1013 - Description:

Added field Z20\_UPD\_TIME\_STAMP to Z20 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1014 - Description:

Added the following fields to Z31 in ADM libraries:

1. Z31\_REQUESTER\_NAME
2. Z31\_UPD\_TIME\_STAMP
3. Z31\_PAYMENT\_IP\_V6
4. Z31\_NOTE

\*\*\*\*\*  
\*\*\*\*\*

Step 1015 - Description:

Added field Z601\_UPD\_TIME\_STAMP to Z601 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1016 - Description:

Added field Z76\_UPD\_TIME\_STAMP to Z76 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1017 - Description:

Added field Z77\_UPD\_TIME\_STAMP to Z77 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1018 - Description:

Added field Z78\_UPD\_TIME\_STAMP to Z78 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1019 - Description:

Added field Z501\_UPD\_TIME\_STAMP to Z501 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1020 - Description:

Added field Z69\_UPD\_TIME\_STAMP and Z69\_CLIENT\_ADDRESS\_V6 to Z69 in BIB & COURSE libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1021 - Description:

Update Z68 table:

- 1) Added field Z68\_UPD\_TIME\_STAMP to Z68 in ADM libraries.
- 2) Added a new Oracle index to z68 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1022 - Description:

Added field Z70\_UPD\_TIME\_STAMP to Z70 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1023 - Description:

Added the following fields to Z36 in ADM libraries:

1. Z36\_UPD\_TIME\_STAMP
2. Z36\_LOAN\_CATALOGER\_IP\_V6
3. Z36\_RETURN\_CATALOGER\_IP\_V6
4. Z36\_RENEW\_CATALOGER\_IP\_V6

\*\*\*\*\*  
\*\*\*\*\*

Step 1024 - Description:

Added the following fields to Z36H in ADM libraries:

1. Z36H\_UPD\_TIME\_STAMP
2. Z36H\_LOAN\_CATALOGER\_IP\_V6
3. Z36H\_RETURN\_CATALOGER\_IP\_V6
4. Z36H\_RENEW\_CATALOGER\_IP\_V6

\*\*\*\*\*  
\*\*\*\*\*

Step 1025 - Description:

Added fields Z37\_REQUESTER\_NAME, Z37\_UPD\_TIME\_STAMP and Z37\_CATALOGER\_IP\_V6 to Z37 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1026 - Description:

Added fields Z37H\_REQUEST\_IDENTIFIER, Z37H\_REQUESTER\_NAME, Z37H\_UPD\_TIME\_STAMP and Z37H\_CATALOGER\_IP\_V6 to Z37h in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1027 - Description:

Added the following fields to Z38 in ADM libraries:

1. Z38\_CHRONOLOGICAL\_K
2. Z38\_REQUESTER\_NAME

- 3. Z38\_ADDITIONAL\_INFO
- 4. Z38\_UPD\_TIME\_STAMP
- 5. Z38\_CATALOGER\_IP\_V6

\*\*\*\*\*  
 \*\*\*\*\*

Step 1028 - Description:

Added new table Z38H in ADM libraries.

\*\*\*\*\*  
 \*\*\*\*\*

Step 1029 - Description:

Added field Z08\_UPD\_TIME\_STAMP to Z08 in ADM libraries.

\*\*\*\*\*  
 \*\*\*\*\*

Step 1030 - Description:

Added the fields Z30H\_UPD\_TIME\_STAMP and Z30H\_IP\_LAST\_RETURN\_V6 to Z30H in ADM libraries.

\*\*\*\*\*  
 \*\*\*\*\*

Step 1031 - Description:

Added new table z900 in ADM, BIB, USR, CRS & ILL libraries.

\*\*\*\*\*  
 \*\*\*\*\*

Step 1032 - Description:

Recreate the index on z105 table as non unique index.

\*\*\*\*\*  
 \*\*\*\*\*

Step 1033 - Description:

- 1) Add fields Z309\_UPD\_TIME\_STAMP, Z309\_REQUEST\_NUMBER, Z309\_CATALOGER\_IP\_V6 and Z309\_PHOTO\_REQUEST\_NUMBER to Z309 in ADM library.
- 2) Add two indexes on Z309\_ID6 and Z309\_ID7

\*\*\*\*\*  
 \*\*\*\*\*

Step 1034 - Description:

Add fields Z34\_IP\_ADDRESS\_V6 to Z34 in PW library.

\*\*\*\*\*  
 \*\*\*\*\*

Step 1035 - Description:

Add field Z403\_IP\_ADDRESS\_V6 to Z403 in BIB and CRS libraries.

\*\*\*\*\*  
 \*\*\*\*\*



Step 1036 - Description:

Add field Z700\_SERVER\_ADDRESS\_V6 to Z700 in USR library.

\*\*\*\*\*  
\*\*\*\*\*

Step 1037 - Description:

Add fields Z72\_VENDOR\_IP\_V6 to Z72 in ADM library.

\*\*\*\*\*  
\*\*\*\*\*

Step 1038 - Description:

Drop & Create z79\_id index in order to add Z79\_FILTER\_n fields to the index definition.

\*\*\*\*\*  
\*\*\*\*\*

Step 1039 - Description:

Drop & Create z111\_id2 index in order to add Z111\_SOURCE field to the index definition (USR/PW and ADM libraries).

\*\*\*\*\*  
\*\*\*\*\*

Step 1040 - Description:

Add New Oracle table Z307(Patron record log) in USR library.

\*\*\*\*\*  
  
\*\*\*\*\*

Step 1041 - Description:

Only for 'ELIB' region:  
Add new Oracle index z31\_id9 in ADM libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1042 - Description:

Only for 'ELIB' region:  
Add new Oracle table ze02 in ILL libraries.

\*\*\*\*\*  
\*\*\*\*\*

Step 1043 - Description:

Only for 'ELIB' region:  
Restart all libraries triggers.

\*\*\*\*\*  
\*\*\*\*\*

Step trigger1 - Description:

Start update timestamp triggers

\*\*\*\*\*

## 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.

| <b>New files:</b>                                                                                                                                                                                                                                                                                                                                                                            | <b>Deleted Files:</b>                                                              | <b>Modified Files:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Files under www_f_eng</b><br>bor-history-hold-body<br>bor-history-hold-exp<br>bor-history-hold-exp-head<br>bor-history-hold-head<br>bor-history-hold-no-hold<br>bor-history-hold-tail<br>csrf-validation<br>item-photo-request-details<br>item-photo-request-tail-an<br>preview-file-body<br>preview-file-head<br>preview-file-tail<br>icon/f-check-mark-1.gif<br>icon/f-check-mark-2.gif | <b>Files under www_f_eng</b><br>bor-renew-all-renewed-body<br>find-r<br>find-r-top | <b>Files under www_f_eng</b><br>abrs-reading-room-body-1-bll01<br>abrs-reading-room-body-3-bll01<br>acq-request<br>acq-request-doc-head<br>acq-request-doc-head-conf<br>booking-page-form-head<br>booking-req-conf-2<br>bor-cash-body<br>bor-cash-head<br>bor-hold-body<br>bor-hold-exp<br>bor-hold-head<br>bor-include-1<br>bor-include-3<br>bor-include-4<br>bor-info<br>bor-info-single-adm<br>bor-new<br>bor-note-new<br>bor-photo-body<br>bor-photo-exp<br>bor-photo-head<br>bor-renew-all-head-2<br>bor-update<br>bor-update-without-date<br>collect-data-js<br>copyrights<br>direct-tail<br>direct-tail-mab01 |

| <b>New files:</b> | <b>Deleted Files:</b> | <b>Modified Files:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   |                       | full-mail<br>full-set-tail<br>full-set-tail-mab01<br>group-request-exec-body<br>group-request-head<br>ill-book-request-mab01<br>ill-journal-request-mab01<br>ill-request-doc-tail-mab01<br>include-select-format-mab01<br>Item-global-body<br>item-global-body-head<br>item-hold-request-details<br>item-hold-request-head<br>item-hold-request-tail<br>item-photo-request-1<br>item-photo-request-head<br>item-photo-request-tail<br>locate-list-mab01<br>login-request<br>login-request-mab01<br>myshelf-course<br>myshelf-course-mab01<br>myshelf-full-head-mab01<br>myshelf-full-tail<br>myshelf-full-tail-mab01<br>myshelf-mail<br>myshelf-mail-mab01<br>myshelf-note-full<br>myshelf-note-short<br>myshelf-short-body<br>myshelf-short-head-2<br>myshelf-short-head-2-no-course<br>new-book-mab01<br>new-ill-book-request<br>new-ill-book-request-mab01<br>new-ill-book-request-uni01<br>new-ill-journal-request<br>new-ill-journal-request-mab01<br>new-ill-journal-request-uni01<br>new-ill-req-conf-tail<br>new-ill-r-head<br>new-record<br>pds-login<br>save-file |

| New files: | Deleted Files: | Modified Files:                                         |
|------------|----------------|---------------------------------------------------------|
|            |                | short-mail<br>title-request-form-head<br>user-info-mail |

## 7.2. Updated Files

The following files under `$alephe_root` were changed to allow for new features or previewbug 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:

- Photocopy Request Special Due Date
- Request Confirmation Screen (mandatory)
- Additional info
- Requester name
- CSRF Handling
- Saving to PC via firewall (only for multi-tier topology)
- Hold Request History List in OPAC library card
- Hold request status information in E-shelf
- Bug fixes
- Miscellaneous

### Photocopy Request Special Due Date

#### Item-global-body

Immediately after the lines:

```
<!--Due date-->
<td class=td1>$0400</td>
```

Add:

```
<!--Due date (Special)-->
<td class=td1>$1800</td>
```

#### item-global-body-head

After:

```
<th class="text3">Due date</th>
```

Add:

```
<th class="text3">Due date (Special)</th>
```

#### item-photo-request-head

After:

```
<input type=hidden name="end_rec_key" value=$3100>
```

Add:

```
<input type=hidden name="bib_doc_num" value=$3400>
```

```
<input type=hidden name="bib_library" value=$3500>
```

### **item-photo-request-1**

Change:

```
<body onload="top.location = '&server_f?func=item-photo-
request&doc_library=$0100&adm_doc_number=$0200&item_sequence=$0300'">
```

To:

```
<body onload="top.location = '&server_f?func=item-photo-
request&doc_library=$0100&adm_doc_number=$0200&item_sequence=$0300 &bib
_doc_num=$0400&bib_library=$0500'">
```

### **Request Confirmation Screen**

**Note! This change is mandatory.**

### **item-hold-request-details**

After:

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

Add:

```
<input type=hidden name="item_sequence" value=$4200>
```

```
<input type=hidden name="bib_request" value=$0800>
```

```
<input type=hidden name="year" value=$4300>
```

```
<input type=hidden name="volume" value=$4400>
```

```
<input type=hidden name="sub_library" value=$4500>
```

```
<input type=hidden name="type" value=$4600>
```

```
<input type=hidden name="no_loaned" value=$4700>
```

```
<input type=hidden name="start_rec_key" value=$4800>
```

```
<input type=hidden name="end_rec_key" value=$4900>
```

```
<input type=hidden name="pickup" value=$4100>
```

```
<input type=hidden name="from" value=$3900>
```

```
<input type=hidden name="to" value=$5700>
```

```
<input type=hidden name="note1" value="$3300">
```

```
<input type=hidden name="note2" value="$3400">
```

```
<input type=hidden name="author" value="$3000">
```

```
<input type=hidden name="title" value="$3100">
```

```
<input type=hidden name="pages" value="$3200">
```

```
<input type=hidden name="rush_request" value=$3500>
```

Change:

```

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

To:

```

Note that the request will not be active unless the 'Go' button is
clicked
</td>
```

After:

```

Note that the request will not be active unless the 'Go' button is
clicked
</td>
</tr>
<tr>
<td>
 </td>
</tr>
```

Add:

```
<tr>
<td class="td2" nowrap>Pickup location:</td>
<td class="td2" nowrap>$0300.$0500</td>
</tr>
```

Remove:

```
<tr>
<td class="td2" colspan=2>

<input type="image"
alt="Order"
src="&icon_path/f-go.gif" border=0>

</td>
</tr>
```

After:

```
<tr>
<td class="td2">Rush Handling </td>
<td class="td2">$3500</td>
</tr>
</table>
```

Add:

```
<div class=title>

Requested Item Details

</div>

<table border=0 cellspacing=2 width="90%">
<tr>
<td class="td2" nowrap>Bibliographic Information:</td>
</tr>

<tr>
<td colspan=2 class="td2"> $5600 </td>
</tr>
```



Change:

```

```

To:

```

```

### item-hold-request-head

After:

```
<head>
```

Add:

```
<script language="Javascript">
<!--
function my_reset()
{
for (var i = 0; i < document.form1.elements.length; i++) {
if (document.form1.elements[i].name == "author" ||
document.form1.elements[i].name == "title" ||
document.form1.elements[i].name == "pages" ||
document.form1.elements[i].name == "note1" ||
document.form1.elements[i].name == "note2") {
document.form1.elements[i].value = "";
}

if (document.form1.elements[i].name == "rush_request")
document.form1.elements[i].checked = false ;

}
}
// -->
</script>
```

### item-photo-request-head

After:

```
<head>
```

Add:

```
<script language="Javascript">
<!--
function my_reset()
{
for (var i = 0; i < document.form1.elements.length; i++) {
if (document.form1.elements[i].name == "author" ||
document.form1.elements[i].name == "title" ||
document.form1.elements[i].name == "pages" ||
document.form1.elements[i].name == "note" ||
document.form1.elements[i].name == "note2") {
document.form1.elements[i].value = "";
}
}
}
// -->
</script>
```



```
}
}
// -->
</script>
```

### item-photo-request-tail

Change:

```
<input size=30 maxlength=50 name="author" value=$3000></td>
```

To:

```
<input size=30 maxlength=50 name="author" value="$3000"></td>
```

Change:

```
<input size=30 maxlength=100 name="title" value=$3100></td>
```

To:

```
<input size=30 maxlength=100 name="title" value="$3100"></td>
```

Change:

```
<input size=30 maxlength=30 name="pages" value=$3200></td>
```

To:

```
<input size=30 maxlength=30 name="pages" value="$3200"></td>
```

Change:

```
<input size=30 maxlength=100 name="note" value=$3300></td>
```

To:

---

```
<input size=30 maxlength=100 name="note" value="$3300"></td>
```

After:

```
<tr>
 <td class=td2>Note </td>
 <td class=td2> </td>
 <td class=td2>
 <input size=30 maxlength=100 name="note" value="$3300"></td>
</tr>
```

Add:

```
<tr>
 <td class=td2>Note 2 </td>
 <td class=td2> </td>
 <td class=td2>
 <input size=30 maxlength=100 name="note2" value="$3600"></td>
</tr>
```

Change:

```

```

To:

```

```

## Additional info

### item-photo-request-head

Change:

```
document.form1.elements[i].name == "note2") {
```

To:

```
document.form1.elements[i].name == "note2" //
document.form1.elements[i].name == "addlinfo") {
```

### item-photo-request-tail

After:

```
<tr>
 <td class=td2>Note 2 </td>
 <td class=td2> </td>
 <td class=td2>
 <input size=30 maxlength=100 name="note2" value="$3600"></td>
</tr>
```

Add:

```
<tr>
 <td class=td2>Additional Info </td>
 <td class=td2> </td>
 <td class=td2>
 <textarea name="addlinfo" cols=60 rows=10>$3700</textarea></td>
</tr>
```

### bor-photo-exp

After:

```
<tr>
 <td class=td1 id=bold align=left>Location 2:</td>
 <td class=td1 align=left> $1300</td>
</tr>
```

Add:

```
<tr>
 <td class=td1 id=bold align=left>Additional Information:</td>
 <td class=td1 align=left> $1400</td>
</tr>
```

## Requester name

### item-hold-request-tail,

Add within the table:

```
<tr>
 <td class="td2">Requester Name </td>
```

```
<td class="td2">
 <input size=30 maxlength=100 name="requestername" value="$3800"></td>
</tr>
```

### item-photo-request-tail, item-photo-request-tail-an

Add within the table:

```
<tr>
 <td class=td2>Requester Name </td>
 <td class=td2> </td>
 <td class=td2>
 <input size=30 maxlength=100 name="requestername" value="$3800"></td>
</tr>
```

### item-hold-request-head

Change:

```
document.form1.elements[i].name == "note2" ") {
```

To:

```
document.form1.elements[i].name == "note2" ||
 document.form1.elements[i].name == "requestername") {
```

### Item-photo-request-head

Change:

```
document.form1.elements[i].name == "note2" ||
document.form1.elements[i].name == "addlinfo") {
```

To:

```
document.form1.elements[i].name == "note2" ||
document.form1.elements[i].name == "addlinfo" ||
 document.form1.elements[i].name == "requestername") {
```

### item-hold-request-details

Change:

```
<a
 href="&server_f?func=item-hold-
request&doc_library=$0100&adm_doc_number=$0200&item_sequence=$42
00&year=$4300&volume=$4400&sub_library=$4500&type=$4600&no_loan
ed=$4700&start_rec_key=$4800&end_rec_key=$4900&source_form=HOLD
_DETAILS&from_date=$3900&to_date=$5700&author=$3000&title=$3100
&pages=$3200¬e1=$3300¬e2=$3400&rush_ind=$3500&pickup_loc=
$4100">
```

To:

```
<a
 href="&server_f?func=item-hold-
request&doc_library=$0100&adm_doc_number=$0200&item_sequence=$42
00&year=$4300&volume=$4400&sub_library=$4500&type=$4600&no_loan
ed=$4700&start_rec_key=$4800&end_rec_key=$4900&source_form=HOLD
_DETAILS&from_date=$3900&to_date=$5700&author=$3000&title=$3100
&pages=$3200¬e1=$3300¬e2=$3400&rush_ind=$3500&pickup_loc=
$4100&requestername=$3800">
```

### item-hold-request-details

After:

<input type=hidden name="rush\_request" value=\$3500>

Add:

*<input type=hidden name="requestername" value="\$3800">*

After:

<tr>

<td class="td2">Rush Handling </td>

<td class="td2">\$3500</td>

</tr>

Add:

*<tr>*

*<td class="td2">Requester Name </td>*

*<td class="td2">\$3800</td>*

*</tr>*

### **bor-cash-head**

After:

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

Add:

*<th class="text3">Requester Name</th>*

### **bor-cash-body, bor-photo-body**

After:

<td class=td1 valign=top>\$0800</td>

Add:

*<td class=td1 valign=top>\$1100</td>*

### **bor-hold-exp**

After:

<tr>

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

<td class=td1>&nbsp;\$2200</td>

</tr>

Add:

*<tr>*

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

*<td class=td1> &nbsp;\$2400</td>*

*</tr>*

### **bor-photo-exp**

After:

<tr>

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

<td class=td1 align=left>&nbsp;\$1400</td>

</tr>

Add:

*<tr>*



### **bor-update, bor-update-without-date**

After:

```
<input type=hidden name="func" value="bor-update-1">
```

Add:

```
<input type=hidden name="token_id" value="$9900">
```

### **new-ill-book-request, new-ill-journal-request, new-ill-r-head**

After:

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

Add:

```
<input type=hidden name="token_id" value="$9900">
```

### **item-hold-request-head**

After:

```
<input type=hidden name="end_rec_key" value=$3100>
```

Add:

```
<input type=hidden name="token_id" value="$9900">
```

### **booking-page-form-head, booking-req-conf-2**

After:

```
<input type="hidden" name="confirmed" ...>
```

Add:

```
<input type="hidden" name="token_id" value="$9900">
```

### **title-request-form-head**

After:

```
<input type=hidden name="chron_k" value=$0800>
```

Add:

```
<input type=hidden name="token_id" value="$9900">
```

### **myshelf-note-short, myshelf-note-full**

After:

```
<input type=hidden name=source_func value=$0500>
```

Add:

```
<input type=hidden name="token_id" value="$9900">
```

### **acq-request-doc-head, acq-request-doc-head-conf**

After:

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

Add:

```
<input type=hidden name="token_id" value="$9900">
```

### **acq-request**

After:

```
<input type="hidden" name=source_func value="acq-request">
```

Add:

```
<input type=hidden name="token_id" value="$9900">
```

### **new-ill-req-conf-tail**

Change:

`<a href="&server_f?func=cancel-request-1&doc_number=$0200">`

To:

`<a href="&server_f?func=cancel-request-1&doc_number=$0200&token_id=$9900">`

### **group-request-head**

After:

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

Add:

`<input type=hidden name="token_id" value="$9900">`

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

Change:

`<a href="&server_f?func=myshelf-delete&folder_key=$2000&folder=$1500"`

To:

`<a href="&server_f?func=myshelf-delete&folder_key=$2000&folder=$1500&token_id=$9900"`

Change:

`<a href="&server_f?func=myshelf-group-req&req_type=SERIAL&folder_key=$2000&folder=$1500"`

To:

`<a href="&server_f?func=myshelf-group-req&req_type=SERIAL&folder_key=$2000&folder=$1500&token_id=$9900"`

Change:

`<a href="&server_f?func=myshelf-group-req&req_type=PARALLEL&folder_key=$2000&folder=$1500"`

To:

`<a href="&server_f?func=myshelf-group-req&req_type=PARALLEL&folder_key=$2000&folder=$1500&token_id=$9900"`

Change:

`<a href="&server_f?func=myshelf-group-req&req_type=REGULAR&folder_key=$2000&folder=$1500"`

To:

`<a href="&server_f?func=myshelf-group-req&req_type=REGULAR&folder_key=$2000&folder=$1500&token_id=$9900"`

### **new-record**

After:

`<input type=hidden name="ADM__008__" value="-----b-----  
----r----000-0-und-d">`

Add:

`<input type=hidden name="token_id" value="$9900">`

### **bor-note-new**

After:  
<input type=hidden name=clear\_level value="0">  
Add:  
*<input type=hidden name="token\_id" value="\$9900">*  
Change:  
<a href="&server\_f?func=bor-note-new&clear\_level=2">  
To:  
<a href="&server\_f?func=bor-note-new&clear\_level=2&token\_id=\$9900">

### **item-hold-request-details**

After:  
<input type=hidden name="requestername" value="\$3800">  
Add:  
*<input type=hidden name="token\_id" value=\$9900>*

### **Saving to PC via firewall (only for multi-tier topology)**

#### **myshef-mail**

After:  
<input type=hidden name=func value=myshef-mail>  
Add:  
*<input type=hidden name=preview\_required value="Y">*

#### **myshef-course**

After:  
<input type=hidden name=func value=myshef-course>  
Add:  
*<input type=hidden name=preview\_required value="Y">*

#### **user-info-mail**

After:  
<input type=hidden name=func value=user-info-mail>  
Add:  
*<input type=hidden name=preview\_required value="Y">*

#### **short-mail**

After:  
<input type=hidden name=func value=short-mail>  
Add:  
*<input type=hidden name=preview\_required value="Y">*





After:

Documents in My e-Shelf:

Add:

```

submitted a hold request
```

After:

```
<th class="text3">$0300</th>
```

Add:

```
<th class="text3">$1600</th>
```

### group-request-exec-head

After:

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

Add:

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

### group-request-exec-body

After:

```
<td class="td2" nowrap>$0200</td>
```

Add:

```
<td class="td2" nowrap>$0300</td>
```

## Bug fixes

### bor-new

After:

```
<head>
```

Add:

```
<script language="Javascript">
<!--
function my_reset()
{
 for (var i = 0; i < document.form1.elements.length; i++) {
 if (document.form1.elements[i].name == "M_Z303_NAME" ||
 document.form1.elements[i].name == "M_Z303_ID" ||
 document.form1.elements[i].name == "M_Z303_SUB_LIB" ||
 document.form1.elements[i].name == "M_Z303_VERIFICATION_1" ||
 document.form1.elements[i].name == "M_Z303_VERIFICATION_CHECK" ||
 document.form1.elements[i].name == "N_ADDITIONAL_ID_DATA" ||
 document.form1.elements[i].name == "N_ADDITIONAL_ID_VER" ||
 document.form1.elements[i].name == "N_ADDITIONAL_ID_VER_CHECK" ||
 document.form1.elements[i].name == "M_Z304_ADDRESS2" ||
 document.form1.elements[i].name == "N_Z304_ADDRESS3" ||
```

```

document.form1.elements[i].name == "N_Z304_ADDRESS4" //
document.form1.elements[i].name == "N_Z304_ADDRESS5" //
document.form1.elements[i].name == "N_Z304_ZIPCODE" //
document.form1.elements[i].name == "N_Z304_EMAIL" //
document.form1.elements[i].name == "M_Z304_TELEPHONE" //
document.form1.elements[i].name == "N_Z304_TELEPHONE2" //
document.form1.elements[i].name == "N_Z304_SMS_NUMBER" //
document.form1.elements[i].name == "M_Z304_DATE_FROM" //
document.form1.elements[i].name == "M_Z304_DATE_TO" //
document.form1.elements[i].name == "N_Z303_GENDER" //
document.form1.elements[i].name == "N_Z303_BIRTHPLACE" //
document.form1.elements[i].name == "__mail_attachment" //
document.form1.elements[i].name == "N_PASSWORD_VALUE") {
document.form1.elements[i].value = "";
}

if (document.form1.elements[i].name == "N_Z303_WANT_SMS" //
document.form1.elements[i].name == "N_Z303_EXPORT_CONSENT")
document.form1.elements[i].checked = false ;

if (document.form1.elements[i].name == "N_Z303_BIRTH_DATE")
document.form1.elements[i].value = "00000000";

}
}
// -->
</script>

```

Change:

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

To:

<a href="javascript:my\_reset();">

### **bor-renew-all-head-2**

After:

<th>Item Desc</th>

Add:

<th>Comment</th>

### **abrs-reading-room-body-1-bll01, abrs-reading-room-body-3-bll01**

Change

"<form method=GET"

To:

"<form method=POST"

### **login-request**

Change:

<input type="hidden" name="func" value="login">

To:  
*<input type="hidden" name="func" value="login-session">*

### **pds-login**

Change:  
window.location = url;  
To:  
*window.location.replace (url);*

### **new-ill-book-request, new-ill-book-request-mab01, new-ill-book-request-uni01, new-ill-journal-request, new-ill-journal-request-mab01, new-ill-journal-request-uni01**

Change:  
<form name=form1  
method=post  
action="&server\_f"  
onSubmit="my\_replace()";>  
To:  
*<form name=form1  
method=post  
action="&server\_f"  
accept-charset="UTF-8"  
onSubmit="my\_replace()";>*

### **item-hold-request-details**

Change:  
<a href="&server\_f?func=item-hold-  
request&doc\_library=\$0100&adm\_doc\_number=\$0200&item\_sequence=\$4200&yea  
r=\$4300&volume=\$4400&sub\_library=\$4500&type=\$4600&no\_loaned=\$4700&star  
t\_rec\_key=\$4800&end\_rec\_key=\$4900&source\_form=HOLD\_DETAILS&from\_dat  
e=\$3900&to\_date=\$5700&author=\$3000&title=\$3100&pages=\$3200&note1=\$3300  
&note2=\$3400&rush\_ind=\$3500&pickup\_loc=\$4100&requestername=\$3800">  
To:  
*<a href="&server\_f?func=item-hold-  
request&doc\_library=\$0100&adm\_doc\_number=\$0200&item\_sequence=\$4200&ye  
ar=\$4300&volume=\$4400&sub\_library=\$4500&type=\$4600&no\_loaned=\$4700&s  
tart\_rec\_key=\$4800&end\_rec\_key=\$4900&source\_form=HOLD\_DETAILS&from\_d  
ate=\$3900&to\_date=\$5700&author=\$6000&title=\$6100&pages=\$6200&note1=\$6  
300&note2=\$6400&rush\_ind=\$3500&pickup\_loc=\$6500&requestername=\$6600">*

### **save-file**

After:  
<title>&f-base - Save file on pc</title>  
Add:  
*<include>meta-tags*

## Miscellaneous

### **bor-history-loan-no-loan**

Change :

```
<title>&f-base - Items on Loan </title>
```

To:

```
<title>&f-base - Loaned Items On History List</title>
```

### **bor-photo-exp**

After:

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

Add :

```
<tr>
 <td class=td1 id=bold align=left>Note 1:</td>
 <td class=td1 align=left> $1600</td>
</tr>
<tr>
 <td class=td1 id=bold align=left>Note 2:</td>
 <td class=td1 align=left> $1700</td>
</tr>
```

### **bor-info**

After:

```
<tr>
 <td class=td1 align=left>
 Budget
 </td>
 <td class=td1 align=left>
 $0600
 </td>
</tr>
```

Add:

```
<tr>
 <td class=td1 align=left>
 Bor ID
 </td>
 <td class=td1 align=left>
 $6000
 </td>
</tr>
```

### **bor-new**

The following fields can now be configured when creating a new patron:

After:

```
<input type="hidden" name=N_Z303_SEND_ALL_LETTERS value="Y">
```

Add:

```
<input type="hidden" name=M_Z305_PHOTO_CHARGE value="F">
<input type="hidden" name=M_Z305_HOLD_ON_SHELF value="Y">
<input type="hidden" name=M_Z305_BOR_TYPE value="AS">
<input type="hidden" name=M_Z303_ILL_ACTIVE_LIMIT value="0010">
<input type="hidden" name=M_Z303_ILL_LIB value="ILL_WID">
<input type="hidden" name=M_Z303_ILL_TOTAL_LIMIT value="0010">
<input type="hidden" name=M_Z304_ADDRESS1 value="Hill Avenue">
```

### bor-cash-body

OPAC - my library card – In order to display the bibliographic information and the author for each cash transaction:

Change :

```
<td class=td1 valign=top>$0900</td>
```

```
<td class=td1 valign=top>$0200</td>
```

To:

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

```
<td class=td1 valign=top>$1300</td>
```

### ill-book-request-mab01

Change:

```
onload="window.document.form1.BIB__1001_a_1500.focus()>
```

To:

```
onload="window.document.form1.BIB__100__a_1500.focus()>
```

Change:

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

```
<input type=hidden name="BIB__FMT__" value="BK">
```

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

```
<input type=hidden name="BIB__008__" value="-----b-----r-----000-0-und-d">
```

```
<input type=hidden name="ADM__FMT__" value="AD">
```

```
<input type=hidden name="ADM__LDR__" value="-----nx-----mi-----">
```

```
<input type=hidden name="ADM__008__" value="-----b-----r-----000-0-und-d">
```

To:

```
<input type="hidden" name="BIB__TYP__" value="BOOK">
```

```
<input type="hidden" name="BIB__FMT__" value="MH">
```

```
<input type="hidden" name="BIB__LDR__" value="-----nM2.01200024-----h">
```

```
<input type="hidden" name="ADM__FMT__" value="AD">
```

Change:

<input size=40 maxlength=180 name="BIB\_\_1001\_a\_1500" value="\$1500">  
To:  
*<input size=40 maxlength=180 name="BIB\_\_100\_\_a\_1500" value="\$1500">*

Change:  
<input size=40 maxlength=180 name="BIB\_\_7001\_a\_1600" value="\$1600">  
To:  
*<input size=40 maxlength=180 name="BIB\_\_104\_\_a\_1600" value="\$1600">*

Change:  
<input size=40 maxlength=120 name="BIB\_M\_2451\_a\_1700" value="\$1700">  
To:  
*<input size=40 maxlength=120 name="BIB\_M\_331\_\_a\_1700" value="\$1700">*

Change:  
<input size=20 maxlength=20 name="BIB\_\_250\_\_a\_1800" value="\$1800">  
To:  
*<input size=20 maxlength=20 name="BIB\_\_403\_\_a\_1800" value="\$1800">*

Change:  
<input size=40 maxlength=120 name="BIB\_\_260\_\_a\_1900" value="\$1900">  
To:  
*<input size=40 maxlength=120 name="BIB\_\_410\_\_a\_1900" value="\$1900">*

Change:  
<input size=40 maxlength=120 name="BIB\_\_260\_\_b\_2000" value="\$2000">  
To:  
*<input size=40 maxlength=120 name="BIB\_\_412\_\_a\_2000" value="\$2000">*

Change:  
<input size=15 maxlength=15 name="BIB\_\_260\_\_c\_2100" value="\$2100">  
To:  
*<input size=15 maxlength=15 name="BIB\_\_425\_\_a\_2100" value="\$2100">*

Change:  
<input size=15 maxlength=15 name="BIB\_\_020\_\_a\_2200" value="\$2200">  
To:  
*<input size=15 maxlength=15 name="BIB\_\_540\_\_a\_2200" value="\$2200">*

Change:  
<input size=40 maxlength=60 name="BIB\_\_440\_0a\_2300" value="\$2300">  
To:  
*<input size=40 maxlength=60 name="BIB\_\_451\_\_a\_2300" value="\$2300">*

Change:  
<input size=40 maxlength=60 name="BIB\_\_590\_\_a\_2400" value="\$2400">  
To:  
*<input size=40 maxlength=60 name="BIB\_\_QUE\_\_a\_2400" value="\$2400">*

Change:

<input size=40 maxlength=180 name="BIB\_\_70012a\_2500" value="\$2500">  
To:  
*<input size=40 maxlength=180 name="BIB\_\_ART\_\_b\_2500" value="\$2500">*

Change:  
<input size=40 maxlength=120 name="BIB\_\_74002a\_2600" value="\$2600">  
To:  
*<input size=40 maxlength=120 name="BIB\_\_ART\_\_a\_2600" value="\$2600">*

### **ill-journal-request-mab01**

Change:  
onload="window.document.form1.BIB\_M\_2451\_a\_1500.focus()>  
To:  
*onload="window.document.form1.BIB\_M\_331\_\_a\_1500.focus()>*

Change:  
onSubmit="my\_replace(document.form1.BIB\_\_591\_\_a\_2800);>  
To:  
*onSubmit="my\_replace(document.form1.BIB\_\_TXT\_\_a\_2800);>*

Change:  
<input type=hidden name="BIB\_\_FMT\_\_" value="SE">  
<input type=hidden name="BIB\_\_592\_\_" value="SERIAL">  
<input type=hidden name="BIB\_\_LDR\_\_" value="-----nam-----a-----">  
<input type=hidden name="BIB\_\_008\_\_" value="-----b-----r-----000-0-und-d">  
<input type=hidden name="ADM\_\_FMT\_\_" value="AD">  
<input type=hidden name="ADM\_\_LDR\_\_" value="-----nx-----mi-----">  
<input type=hidden name="ADM\_\_008\_\_" value="-----b-----r-----000-0-und-d">  
To:  
*<input type="hidden" name="BIB\_\_FMT\_\_" value="MH">  
<input type="hidden" name="BIB\_\_TYP\_\_a" value="SERIAL">  
<input type="hidden" name="BIB\_\_LDR\_\_" value="-----nM2.01200024-----h">  
<input type="hidden" name="ADM\_\_FMT\_\_" value="AD">  
<input type="hidden" name="ADM\_\_LDR\_\_" value="-----nx-----mi-----">  
<input type="hidden" name="ADM\_\_008\_\_" value="-----b-----r-----000-0-und-d">*

Change:  
<input size=40 maxlength=120 name="BIB\_M\_2451\_a\_1500" value="\$1500">  
</td>  
To:  
*<input size=40 maxlength=120 name="BIB\_M\_331\_\_a\_1500" value="\$1500">  
</td>*

Change:  
<input size=40 maxlength=60 name="BIB\_\_590\_\_a\_1900" value="\$1900">  
</td>



To:  
*<input size=40 maxlength=60 name="BIB\_\_QUE\_\_a\_1900" value="\$1900"> </td>*

Change:  
*<input size=40 maxlength=60 name="BIB\_\_022\_\_a\_2400" value="\$2400">*  
*</td>*

To:  
*<input size=40 maxlength=60 name="BIB\_\_542\_\_a\_2400" value="\$2400">*  
*</td>*

Change:  
*<input size=40 maxlength=180 name="BIB\_\_70012a\_2500" value="\$2500">*

To:  
*<input size=40 maxlength=180 name="BIB\_\_ART\_\_b\_2500" value="\$2500">*

Change:  
*<input size=40 maxlength=120 name="BIB\_\_74002a\_2600" value="\$2600">*

To:  
*<input size=40 maxlength=120 name="BIB\_\_ART\_\_a\_2600" value="\$2600">*

### **ill-request-doc-tail-mab01**

Change:  
*<input size=40 maxlength=180 name="BIB\_\_70012a\_1600" value="\$1600">*

To:  
*<input size=40 maxlength=180 name="BIB\_\_ART\_\_b\_1600" value="\$1600">*

Change:  
*<input size=40 maxlength=120 name="BIB\_\_74002a\_1700" value="\$1700">*

To:  
*<input size=40 maxlength=120 name="BIB\_\_ART\_\_a\_1700" value="\$1700">*

### **include-select-format-mab01**

Remove:  
*<option value=997 \$\$FXX-S"997">MARC Format</option>*  
*<option value=998 \$\$FXX-S"998">ALEPH Sequential</option>*

### **locate-list-mab01**

Change:  
*<input type=checkbox name="lib1" value="USM01" checked> USM01*

To:  
*<input type=checkbox name="lib1" value="MAB01" checked> MAB01*

Change:  
*<input type=checkbox name="lib2" value="UNI01"> UNI01*

To:

*<input type=checkbox name="lib2" value="USM01"> USM01*

Change:

*<input type=checkbox name="lib3" value="LOC"> Library of Congress (Z39.50)*

To:

*<input type=checkbox name="lib3" value="MUSIC"> Music in MAB01*

Remove:

*<tr>*

*<td class=td2>*

*<input type=checkbox name="lib4" value="DREWDB"> DREWDB - Data  
Research Associates (Z39.50)*

*</td>*

*</tr>*

### **login-request-mab01**

Change:

*<option value="" \$\$0300-S">Shared Pool</option>*

*<option value=USM51 \$\$0300-S"USM51">USM51 Library</option>*

*<option value=UNI50 \$\$0300-S"UNI50">UNI50 Library</option>*

To:

*<option value="MAB50" \$\$0300-S"MAB50">MAB50 Library</option>*

*<option value="USM50" \$\$0300-S"USM50">USM50 Library</option>*

### **myshelf-course-mab01, myshelf-mail-mab01**

Change:

*<td class=td2 id=small >*

*<input type="checkbox"*

*name="own\_format"*

*value="245%23%23"*

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

*</td>*

*<td class=td2 id=small >*

*<input type="checkbox"*

*name="own\_format"*

*value="300"*

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

*</td>*

*<td class=td2 id=small >*

*<input type="checkbox"*

*name="own\_format"*

*value="50%23%23%23"*

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

*</td>*

*<td class=td2 id=small >*

*<input type="checkbox"*

*name="own\_format"*

*value="6%23%23%23%23"*

```

 $$1000-C"6####">Subject
 </td>
 <td class=td2 id=small >
 <input type="checkbox"
 name="own_format"
 value="SYS"
 $$1000-C"SYS">System Number
 </td>
 <td class=td2 id=small >
 <input type="checkbox"
 name="own_format"
 value="260%23%23"
 $$1000-C"260##">Imprint
 </td>
To:

```

```

 <td class=td2 id=small >
 <input type="checkbox"
 name="own_format"
 value="331%23%23"
 $$1000-C"331##">Title
 </td>
 <td class=td2 id=small >
 <input type="checkbox"
 name="own_format"
 value="9%23%23%23%23"
 $$1000-C"9####">Subject
 </td>
 <td class=td2 id=small >
 <input type="checkbox"
 name="own_format"
 value="SYS"
 $$1000-C"SYS">System Number
 </td>
 <td class=td2 id=small >
 <input type="checkbox"
 name="own_format"
 value="540%23%23"
 $$1000-C"540##">ISBN
 </td>
 <td class="td2" id="small" >
 <input type="checkbox"
 name="own_format"
 value="4%23%23%23%23"
 $$1000-C"4####">Imprint
 </td>
 <td class="td2" id="small" >
 <input type="checkbox"
 name="own_format"
 value="700%23%23"
 $1000-C"700##">Notation

```

</td>

## myshef-full-head-mab01, myshef-full-tail-mab01

Remove:

```
<td class="text1">
 <a
href="&server_f?func=myshef_full&doc_number=$0100¤t_library=$0200&
current_base=$0300&format=040">
 Citation
</td>
```

## new-book-mab01

Change:

```
<input type=hidden name="BIB__FMT__" value="BK">
<input type=hidden name="BIB__LDR__" value="----nam-----a----">
<input type=hidden name="BIB__008__" value="-----b-----r-----000-0-
und-d">
<input type=hidden name="ADM__FMT__" value="AD">
<input type=hidden name="ADM__LDR__" value="----nx-----mi----">
<input type=hidden name="ADM__008__" value="-----b-----r-----000-0-
und-d">
```

To:

```
<input type="hidden" name="BIB__FMT__" value="MH">
<input type="hidden" name="BIB__LDR__" value="----nam-----a----">
<input type="hidden" name="ADM__FMT__" value="AD">
<input type="hidden" name="ADM__LDR__" value="----nx-----mi----">
<input type="hidden" name="ADM__008__" value="-----b-----r-----
000-0-und-d">
<input type="hidden" name="BIB---537--a" value="interim record (OPAC)">
```

Change:

```
<option value=USM01-USM50-UEDUC $$$3200-S"USM01-USM50-
UEDUC">Education Library.</option>
<option value=USM01-USM50-UHLTH $$$3200-S"USM01-USM50-
UHLTH">Health Library.</option>
<option value=USM01-USM50-ULAW $$$3200-S"USM01-USM50-
ULAW">Law Library.</option>
<option value=USM01-USM50-ULINC $$$3200-S"USM01-USM50-
ULINC">Lincoln Library.</option>
```

To:

```
<option value=MAB01-MAB50-MEDUC $$$3200-S"MAB01-MAB50-
MEDUC">Education</option>
<option value=MAB01-MAB50-MLAW $$$3200-S"MAB01-MAB50-
MLAW">Law</option>
<option value=MAB01-MAB50-MLINC $$$3200-S"MAB01-MAB50-
MLINC">Lincoln</option>
```

Change:

```
<input size=30 maxlength=180 name="BIB__1001_a_1000" value="$1000">
```

To:  
*<input size=30 maxlength=180 name="BIB\_\_100\_\_a\_1000" value="\$1000">*

Change:  
*<input size=30 maxlength=180 name="BIB\_\_7001\_\_a\_1100" value="\$1100">*

To:  
*<input size=30 maxlength=180 name="BIB\_\_104\_\_a\_1100" value="\$1100">*

Change:  
*<input size=30 maxlength=120 name="BIB\_M\_2451\_\_a\_1200" value="\$1200">*

To:  
*<input size=30 maxlength=120 name="BIB\_M\_331\_\_a\_1200" value="\$1200">*

Change:  
*<input size=30 maxlength=20 name="BIB\_\_250\_\_a\_1300" value="\$1300">*

To:  
*<input size=30 maxlength=20 name="BIB\_\_403\_\_a\_1300" value="\$1300">*

Change:  
*<input size=30 maxlength=120 name="BIB\_\_260\_\_a\_1400" value="\$1400">*

To:  
*<input size=30 maxlength=120 name="BIB\_\_410\_\_a\_1400" value="\$1400">*

Change:  
*<input size=30 maxlength=120 name="BIB\_\_260\_\_b\_1500" value="\$1500">*

To:  
*<input size=30 maxlength=120 name="BIB\_\_412\_\_a\_1500" value="\$1500">*

Change:  
*<input size=30 maxlength=15 name="BIB\_\_260\_\_c\_1600" value="\$1600">*

To:  
*<input size=30 maxlength=15 name="BIB\_\_425\_\_a\_1600" value="\$1600">*

Change:  
*<input size=30 maxlength=15 name="BIB\_\_020\_\_a\_1700" value="\$1700">*

To:  
*<input size=30 maxlength=15 name="BIB\_\_540\_\_a\_1700" value="\$1700">*

Change:  
*<input size=30 maxlength=60 name="BIB\_\_440\_\_a\_1800" value="\$1800">*

To:  
*<input size=30 maxlength=60 name="BIB\_\_451\_\_a\_1800" value="\$1800">*

Change:  
*<input size=30 maxlength=60 name="BIB\_\_590\_\_a\_1900" value="\$1900">*

To:  
*<input size=30 maxlength=60 name="BIB\_\_QUE\_\_a\_1900" value="\$1900">*

Change:  
*<input type=hidden name="UEDUC" value="GEN---70-BOOK--8"\$1900">*

```
<input type=hidden name="UHLTH" value="GEN---70-BOOK--8"$$3100>
<input type=hidden name="ULAW" value="GEN---70-BOOK--8"$$3100>
<input type=hidden name="ULINC" value="GEN---70-BOOK--8"$$3100>
```

To:

```
<input type="hidden" name="MEDUC" value="-----70-BOOK---"$$3100>
<input type="hidden" name="MLAW" value="-----70-BOOK---"$$3100>
<input type="hidden" name="MLINC" value="-----70-BOOK---"$$3100>
```

### new-ill-book-request-mab01

Change:

```
window.document.form1.BIB__1001_a_2600.focus();}
```

To:

```
window.document.form1.BIB__100__a_2600.focus();}
```

Change:

```
<input type=hidden name="BIB__FMT__" value="BK">
<input type=hidden name="BIB__LDR__" value="^^^^nam^a22^^^^^a^4500">
<input type=hidden name="BIB__008__" value="-----b-----r-----000-0-und-d">
<input type=hidden name=ILLUNIT value="$2900">
```

To:

```
<input type="hidden" name="BIB__TYP__" value="BOOK">
<input type="hidden" name="BIB__051__" value="||||||">
<input type="hidden" name="BIB__FMT__" value="MH">
<input type="hidden" name="BIB__LDR__" value="-----nM2.01200024-----h">
<input type="hidden" name="ILLUNIT" value="$2900">
```

Change:

```
<input size=40 maxlength=180 name="BIB__1001_a_2600" value="$2600">
```

To:

```
<input size=40 maxlength=180 name="BIB__100__a_2600" value="$2600">
```

Change:

```
<input size=40 maxlength=120 name="BIB_M_2451_a_1500" value="$1500">
```

To:

```
<input size=40 maxlength=120 name="BIB_M_331__a_1500" value="$1500">
```

Change:

```
<input size=20 maxlength=20 name="BIB__250__a_1800" value="$1800">
```

To:

```
<input size=20 maxlength=20 name="BIB__403__a_1800" value="$1800">
```

Change:

```
<input size=40 maxlength=120 name="BIB__260__a_1900" value="$1900">
```

To:

```
<input size=40 maxlength=120 name="BIB__410__a_1900" value="$1900">
```

Change:

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

To:  
*<input size=40 maxlength=120 name="BIB\_\_412\_\_a\_3300" value="\$3300">*

Change:  
*<input size=15 maxlength=15 name="BIB\_\_260\_\_c\_2100" value="\$2100">*

To:  
*<input size=15 maxlength=15 name="BIB\_\_425\_\_a\_2100" value="\$2100">*

Change:  
*<input size=15 maxlength=15 name="BIB\_\_020\_\_a\_2200" value="\$2200">*

To:  
*<input size=15 maxlength=15 name="BIB\_\_540\_\_a\_2200" value="\$2200">*

Change:  
*<input size=40 maxlength=60 name="BIB\_\_440\_\_0a\_2300" value="\$2300">*

To:  
*<input size=40 maxlength=60 name="BIB\_\_451\_\_a\_2300" value="\$2300">*

Change:  
*<input size=40 maxlength=60 name="BIB\_\_590\_\_a\_2400" value="\$2400">*

To:  
*<input size=40 maxlength=60 name="BIB\_\_QUE\_\_a\_2400" value="\$2400">*

### **new-ill-journal-request-mab01**

Change:  
window.document.form1.BIB\_M\_2451\_a\_1500.focus();}

To:  
*window.document.form1.BIB\_M\_331\_\_a\_1500.focus();}*

Change:  
*<input type=hidden name="BIB\_\_FMT\_\_" value="SE">*  
*<input type=hidden name="BIB\_\_LDR\_\_" value="^^^^nas^a22^^^^a^4500">*  
*<input type=hidden name="BIB\_\_008\_\_" value="-----b-----r-----000-0-*  
*und-d">*  
*<input type=hidden name=ILLUNIT value="\$2900">*

To:  
*<input type="hidden" name="BIB\_\_FMT\_\_" value="MH">*  
*<input type="hidden" name="BIB\_\_TYP\_\_a" value="SERIAL">*  
*<input type="hidden" name="BIB\_\_052\_\_" value="|||||||">*  
*<input type="hidden" name="BIB\_\_LDR\_\_" value="-----nM2.01200024-----h">*

Change:  
*<input size=40 maxlength=120 name="BIB\_M\_2451\_a\_1500" value="\$1500">*  
*</td>*

To:  
*<input size=40 maxlength=120 name="BIB\_M\_331\_\_a\_1500" value="\$1500">*  
*</td>*

Change:

```
<input size=40 maxlength=60 name="BIB__590__a_1900" value="$1900">
</td>
```

To:

```
<input size=40 maxlength=60 name="BIB__QUE__a_1900" value="$1900">
</td>
```

Change:

```
<input size=40 maxlength=60 name="BIB__022__a_2400" value="$2400">
</td>
```

To:

```
<input size=40 maxlength=60 name="BIB__542__a_2400" value="$2400">
</td>
```

## copyrights

Change:

&copy; 2009 Ex Libris

To:

&copy; 2012 Ex Libris

## direct-tail, direct-tail-mab01, full-set-tail, full-set-tail-mab01, myshelf-full-tail, myshelf-full-tail-mab01

Change:

```
for (isbn in booksInfo) {
 var url_elem = document.getElementById(isbn);
 var pic_elem = document.getElementById("google_book");
 var bookInfo = booksInfo[isbn];
 if (bookInfo) {
 url_elem.href = bookInfo.info_url;
 url_elem.style.display = "";
 if (bookInfo.thumbnail_url)
 {
 pic_elem.src = bookInfo.thumbnail_url;
 pic_elem.style.display = "";
 }
 }
}
```

To:

```
var url_elem = document.getElementById("$0800");
var pic_elem = document.getElementById("google_book");
for (var items_idx = 0; items_idx < booksInfo.totalItems; items_idx++)
{
 var item = booksInfo.items[items_idx];
 if(!item.volumeInfo || !item.volumeInfo.industryIdentifiers) {
 continue;
 }
 url_elem.href = item.volumeInfo.infoLink;
 url_elem.style.display = "";
}
```



```

if (item.volumeInfo.imageLinks.smallThumbnail)
{
 pic_elem.src = item.volumeInfo.imageLinks.smallThumbnail;
 pic_elem.style.display = "";
}
}

```

## 8. General Implementation Notes

This section contains a list of changes related to miscellaneous functions of the system. These changes should be performed manually after running Upgrade Express 20.01 – 21.01. The list does not include changes to Web OPAC files.

### 8.1. ARC Users

Customers who use ARC must manually run the trigger1 step:

To run the trigger 1 step:

From the upgrade\_util menu, select 3 Run upgrade express.

Select 2. Run a specific step.

Type trigger1 as the step to run.

### 8.2. Clear vir

Make sure you have run the Clear vir (option 2 in the Perform Post Upgrade Express Actions). The new Aleph version contains changes in Z63,Z56,Z60,Z64,Z65 Oracle tables which requires operating this utility.

### 8.3. p-manage-62.xml

If localization is required you must add to ./alephe/pc\_b\_lng/p-manage-62.xml the following:

before the line </dialog>

add the lines:

```

<control>
 <edit_num>
 <argname>F28</argname>
 <label>Processes to Create</label>
 <size>2</size>
 <default>1</default>
 </edit_num>
</control>

```

at the end of the file, the lines:

```

<!-- Param: P-NO-PROCESS-X. F38 -->
<!-- Param: P-NO-PROCESS 9(2). -->

```

## 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.

<b>General</b>	<b>Confirmed by</b>	<b>Date</b>
Test that jobs run correctly in job_list.		
Check if the archiving is on (Util O/7/3)		

<b>Cataloging and Items</b>	<b>Confirmed by</b>	<b>Date</b>
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		

<b>Acquisitions and Serials</b>	<b>Confirmed by</b>	<b>Date</b>
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		

<b>ILL</b>	<b>Confirmed by</b>	<b>Date</b>
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)		

<b>Circulation</b>	<b>Confirmed by</b>	<b>Date</b>
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)		

<b>Web OPAC</b>	<b>Confirmed by</b>	<b>Date</b>
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.		

<b>Course Reading</b>	<b>Confirmed by</b>	<b>Date</b>
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.		

<b>Search in GUI Modules</b>	<b>Confirmed by</b>	<b>Date</b>
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		

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

<b>MetaLib/SFX</b>	<b>Confirmed by</b>	<b>Date</b>
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.		

<b>X-server</b>	<b>Confirmed by</b>	<b>Date</b>
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 previous version data has been uploaded and indexed		

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

<b>Publishing</b>	<b>Confirmed by</b>	<b>Date</b>
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		

## Appendix A – Copying Apache

The utility copies the Apache directory supplied with the version (under the backed up **utree**) to the new **utree** that is to be upgraded.

You may choose to copy apache manually:

1. 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 is necessary to recreate the links.

To locate the `tar` Apache directory in the original `u21_1/ tree`:

```
cd /exlibris/aleph/u21_1.orig/alephe
tar -cf apache.tar apache/
```

2. Move `apache.tar` to the "real" ver 21 tree:

```
mv apache.tar /exlibris/aleph/u21_1/alephe
cd /exlibris/aleph/u21_1/alephe
```

3. "Untar" using the following command:

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

4. After copying the Apache directory, perform the following:

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

## Appendix B – Backup and Restore of `jboss_conf`

Before starting the Upgrade Express process, save the `$alephe_root/jboss_conf/` configuration files manually in a separate location since subsequent upgrade runs override them.

Run the following on the target server before the upgrade:

```
mkdir $alephe_root/jboss_conf.before.ue
cp -pR $alephe_root/jboss_conf/* $alephe_root/jboss_conf.before.ue/
```

After the upgrade, restore the `$alephe_root/jboss_conf/` directory:

```
cp -pR $alephe_root/jboss_conf.before.ue/* $alephe_root/jboss_conf/
```

After restoring, make any necessary changes in the `./alephe/jboss_conf/main.properties` and `./global.properties` files.