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 v21). 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 21.01 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.

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
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.

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

```bash
cd $ALEPH_MOUNT/upgrade_express_2001_2101
```

Open the Upgrade Express menu by entering the following command:

```bash
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

```
<table>
<thead>
<tr>
<th>Upgrade Express Utility 20.01 -&gt; 21.01 Version 1.01 Source</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Upgrade Express Utility 20.01 -&gt; 21.01 Version 1.01 Source</th>
</tr>
</thead>
</table>

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:

<table>
<thead>
<tr>
<th>Upgrade Express Utility 20.01 -&gt; 21.01 Version 1.01 Target</th>
</tr>
</thead>
</table>

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
DUMPFILE=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

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 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.

<table>
<thead>
<tr>
<th>Perform Post Upgrade Express Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>0. Exit</td>
</tr>
<tr>
<td>1. Remove UTF files (util-x-7)</td>
</tr>
<tr>
<td>2. Clear VIR sessions (util-x-8)</td>
</tr>
<tr>
<td>3. Repack Cataloging tables (util-m-7)</td>
</tr>
<tr>
<td>4. Create Print Templates Package for the PC Client (util-i-6)</td>
</tr>
<tr>
<td>6. Synchronize pcb files</td>
</tr>
<tr>
<td>7. Synchronize error files</td>
</tr>
</tbody>
</table>

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).

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

**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 Updated
  7. Store/Restore configuration files
  8. 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.
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:

<table>
<thead>
<tr>
<th>Library</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>adm_libs</td>
<td>Administrative libraries</td>
</tr>
<tr>
<td>bib_libs</td>
<td>Bibliographic libraries</td>
</tr>
</tbody>
</table>
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}/plainfuncs-grid.xsl:

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

```xml
<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}/plainfuncs-misc.xsl:

Replace the following lines:
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.xsl
./[adm_libs]/form_{lng}/patron-change-report.trn

Step 5 - Description:

The following XSL files where updated (ILL libraries):

1) ./[ill_libs]/form_{lng}/plain-funcs-address.xsl

The following lines were added:

<xsl:template name="ill-unit-address">
2) ./[ill_libs]/form_{lng}/ill-patron-letter-3.xsl

Changed from:

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

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
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

*******************************************************************
*********************************
Step 7 - Description:

Update $alephe_root/aleph_startup file:

Changed from:

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

To:

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

    @ n = $l_ncip_server_port
    foreach lib ($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:
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:

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

with the line:

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

2) /adm_libs/form_{lng}/global.trn

*******************************************************************

Step 20 - Description:

The following XSL files where 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:

```xml
<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:

```xml
<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
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
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:
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:

```
if ("$2" == "") then
  echo "Subject:" >> $TMPDIR/send_mail.$$ 
else
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:

```bash
# 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

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 Salephe_unicode:

1) mab_to_unicode - Replace the following lines:

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>DE</td>
<td></td>
<td>FE22</td>
<td>Doppelbogen, 2. Teil</td>
</tr>
<tr>
<td>DE FF</td>
<td>FE22</td>
<td>Eintrag nicht entfernen</td>
<td></td>
</tr>
<tr>
<td>DF</td>
<td></td>
<td>FE21</td>
<td>Doppeltild, 2. Teil</td>
</tr>
<tr>
<td>DF FF</td>
<td>FE21</td>
<td>Eintrag nicht entfernen</td>
<td></td>
</tr>
</tbody>
</table>

With:

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>DE</td>
<td></td>
<td>FE21</td>
<td>Doppelbogen, 2. Teil</td>
</tr>
<tr>
<td>DE FF</td>
<td>FE21</td>
<td>Eintrag nicht entfernen</td>
<td></td>
</tr>
<tr>
<td>DF</td>
<td></td>
<td>FE23</td>
<td>Doppeltild, 2. Teil</td>
</tr>
<tr>
<td>DF FF</td>
<td>FE23</td>
<td>Eintrag nicht entfernen</td>
<td></td>
</tr>
</tbody>
</table>

2) unicode_to_mab - Add the following lines:

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>FE20 DD</td>
<td></td>
<td>Doppelbogen, 1. Teil</td>
<td></td>
</tr>
<tr>
<td>FE21 DE</td>
<td></td>
<td>Doppelbogen, 2. Teil</td>
<td></td>
</tr>
<tr>
<td>FE22 DD</td>
<td></td>
<td>Doppeltild, 1. Teil</td>
<td></td>
</tr>
<tr>
<td>FE23 DF</td>
<td></td>
<td>Doppeltild, 2. Teil</td>
<td></td>
</tr>
</tbody>
</table>

*******************************************************************
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 Salephe_root/error_lng/check_doc:
   9104 L Subfield o can only be used in 854 and 855 fields.

2. Remove the following line from Salephe_root/error_lng/xml_update_doc:
   9104 Subfield o can only be used in 854 and 855 fields.- $1 error

3. In file Salephe_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
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 libraries.

*******************************************************************
Step 1007 - Description:

Added field Z304_UPD_TIME_STAMP to Z304 in USR libraries.

*******************************************************************
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 libraries.

*******************************************************************
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:

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.

<table>
<thead>
<tr>
<th>New files:</th>
<th>Deleted Files:</th>
<th>Modified Files:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Files under www_f_eng</td>
<td>Files under www_f_eng</td>
<td>Files under www_f_eng</td>
</tr>
</tbody>
</table>

### 7.2. Updated Files

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

File changes can be related to:
- 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:

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

Add:

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

**item-global-body-head**

After:

```xml
<th class="text3">Due date</th>
```
Add:

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

**item-photo-request-head**

After:

Add:

- `<input type=hidden name="bib_doc_num" value=$3400>`
- `<input type=hidden name="bib_library" value=$3500>`

**item-photo-request-1**

Change:

To:

Add:

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

**Request Confirmation Screen**

*Note! This change is mandatory.*

**item-hold-request-details**

After:

Add:

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

Note that the request will not be active unless the 'Go' button is clicked.

Note that the request will not be active unless the 'Go' button is clicked.

Add:

Remove:

After:

Add:

Add:

Add:

Add:
<table border=0 cellspacing=2 width="90%">
<tr>
<td class="td2" nowrap>Bibliographic Information:</td>
</tr>
<tr>
<td colspan=2 class="td2" nowrap>$5600</td>
</tr>
</table>

Note that the request will not be active unless the 'Go' button is clicked.
item-hold-request-tail

Change:
<a href="javascript:document.form1.reset();"><a href="javascript:my_reset();">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 == "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-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>
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**, **item-photo-request-tail**, **item-photo-request-tail-an**

Add within the table:

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

**item-hold-request-head**

Change:

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

To:

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

**item-photo-request-head**

Change:

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

To:

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

**item-hold-request-details**

Change:

```html
<a href="&server_f?func=item-hold-request&doc_library=$0100&adm_doc_number=$0200&item_sequence=$4200&year=$4300&volume=$4400&sub_library=$4500&type=$4600&no_loan=$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&note1=$3300&note2=$3400&rush_ind=$3500&pickup_loc=$4100"/>
```

To:

```html
<a href="&server_f?func=item-hold-request&doc_library=$0100&adm_doc_number=$0200&item_sequence=$4200&year=$4300&volume=$4400&sub_library=$4500&type=$4600&no_loan=$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&note1=$3300&note2=$3400&rush_ind=$3500&pickup_loc=$4100"/>
```
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">$2200</td>
</tr>
Add:
<tr>
    <td class="td1 id-bold align=left">Requester Name:</td>
    <td class="td1">$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>
    <td class=td1 id=bold align=left>Requester Name:</td>
    <td class=td1 align=left>&nbsp;$1500</td>
</tr>

bor-hold-head
After:
    <th class="text3">Note 2</th>
Add:
    <th class="text3">Requester Name</th>

bor-hold-body
After:
    <td class=td1 valign=top>$1600</td>
Add:
    <td class=td1 valign=top>$1900</td>

bor-photo-head
After:
    <th class="text3">Item Description</th>
Add:
    <th class="text3">Requester Name</th>

CSRF Handling
item-photo-request-head
After:
    <input type=hidden name="bib_library" value=$3500>
Add:
    <input type=hidden name="token_id" value="$9900">

bor-include-4
Change:
    <a href="javascript:replacePage('&server_f?func=bor-renew-all&adm_library=$5000');"/>
To:
    <a href="javascript:replacePage('&server_f?func=bor-renew-all&adm_library=$5000&token_id=$9900');"/>
collect-data-js
Change:
    var strData = "&server_f?func=bor-renew-all&renew_selected=Y&adm_library=$1200";
To
    var strData = "&server_f?func=bor-renew-all&renew_selected=Y&adm_library=$1200&token_id=$9900";

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------------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)**

**myshelf-mail**
After:
<input type=hidden name=func value=myshelf-mail>
Add:
<input type=hidden name=preview_required value="Y">

**myshelf-course**
After:
<input type=hidden name=func value=myshelf-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">

full-mail
After:
<input type=hidden name=func value=full-mail>
Add:
<input type=hidden name=preview_required value="Y">

**Hold Request History List in OPAC library card**

**bor-info, bor-info-single-adm**

After:
</td>
$1500
</tr>
Add:
<tr>
<td class=td1>
Hold Requests History
</td>
$9000
</tr>

**bor-include-1, bor-include-3, bor-include-4**

After:
History Loans&nbsp;</a>
</td>
Add:
<td class="bar" align="center" nowrap>
&nbsp;|
</td>
<td class="bar" align="center" nowrap>
<a href="javascript:replacePage('&server_f?func=bor-history-hold&adm_library=$5000');"
title="History Hold Requests" class="blue">History Hold Requests&nbsp;</a>
</td>

**Hold request status information in E-shelf**

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

After:
- Documents in My e-Shelf:
  - Add:
    - `<img src="&icon_path\check-mark-1.gif" border=0 alt="Submitted a hold request"> submitted a hold request`

### group-request-exec-head

After:
- Add:
  - `<th class="text3">Title</th>
  - `<th class="text3">Note</th>`

### group-request-exec-body

After:
- Add:
  - `<td class="td2" nowrap>$0200</td>
  - `<td class="td2" nowrap>$0300</td>`

### Bug fixes

#### bor-new

After:
- 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_BUG" ||
                document.form1.elements[i].name == "M_Z303_FIX" ||
                document.form1.elements[i].name == "M_Z303_STATUS") {
                document.form1.elements[i].value = "";
            }
        }
    }
</script>`
Change:

<table>
<thead>
<tr>
<th>Item Desc</th>
<th>Comment</th>
</tr>
</thead>
</table>
| 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);


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&year=$4300&volume=$4400&sub_library=$4500&type=$4600&no_loaned=$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&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&year=$4300&volume=$4400&sub_library=$4500&type=$4600&no_loaned=$4700&start_rec_key=$4800&end_rec_key=$4900&source_form=HOLD_DETAILS&from_date=$3900&to_date=$5700&author=$6000&title=$6100&pages=$6200&note1=$6300&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>&nbsp;$0500</td>
</tr>
```

Add:

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

**bor-info**

After:

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

Add:

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

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

After:

Add:

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

Change:

To:

ill-book-request-mab01

Change:

To:

Change:
Change:
<input size=40 maxlength=180 name="BIB___1001_a_1500" value="$1500">
To:
<input size=40 maxlength=180 name="BIB___1001_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:

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

Change:

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

To:

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

Change:

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

To:

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

Change:

```xml
<input size=40 maxlength=180 name="BIB___70012a_2500" value="$2500">
</td>
```

To:

```xml
<input size=40 maxlength=180 name="BIB___ART__b_2500" value="$2500">
</td>
```

Change:

```xml
<input size=40 maxlength=120 name="BIB___74002a_2600" value="$2600">
</td>
```

To:

```xml
<input size=40 maxlength=120 name="BIB___ART__a_2600" value="$2600">
</td>
```

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

Change:

```xml
<input size=40 maxlength=180 name="BIB___70012a_1600" value="$1600">
</td>
```

To:

```xml
<input size=40 maxlength=180 name="BIB___ART__b_1600" value="$1600">
</td>
```

Change:

```xml
<input size=40 maxlength=120 name="BIB___74002a_1700" value="$1700">
</td>
```

To:

```xml
<input size=40 maxlength=120 name="BIB___ART__a_1700" value="$1700">
</td>
```

**include-select-format-mab01**

Remove:

```xml
<option value=997 "$FXX-S"997">MARC Format</option>
```

```xml
<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=" Shared Pool">Shared Pool</option>
<option value="USM51">USM51 Library</option>
<option value="UNI50">UNI50 Library</option>
To:
<option value="MAB50">MAB50 Library</option>
<option value="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>
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>
<td class="td2" id="small" >
<input type="checkbox"
name="own_format"
value="4%23%23%23%23"
$$1000-C"4####">ISBN
</td>
</tr>

<tr class=odds>
<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>
</tr>
</table>

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65
myshelf-full-head-mab01, myshelf-full-tail-mab01

Remove:

new-book-mab01

Change:

To:

Change:

To:
Change:
<input size=30 maxlength=180 name="BIB___1001_a_1000" value="$1000">
To:
<input size=30 maxlength=180 name="BIB___1001_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"/>
new-ill-book-request-mab01

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

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---------------------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-un-d-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="nM2.01200024----h">

Change:
To:

Change:

© 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:

To:

for (var items_idx = 0; items_idx < booksInfo.totalItems; items_idx++)
```javascript
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>
  </edit_num>
</control>
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.

<table>
<thead>
<tr>
<th>General</th>
<th>Confirmed by</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test that jobs run correctly in job_list.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Acquisitions and Serials</th>
<th>Confirmed by</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open module and do a search and scan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search Budget file</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search Vendors file</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>ILL</th>
<th>Confirmed by</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check borrowing/lending requests summary tree – compare requests from previous ILL to new ILL (numbers, status, bib info, etc).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check ILL-Admin-Partner list, potential suppliers, customer ID, APDU Exceptions (number of records, record info, etc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check borrowing requests basic flow for returnable material (request creation, send to supplier, register arrival, return to supplier)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check lending requests basic flow for returnable material (request creation, supply material, check-in material)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check OPAC-Library card-ILL info (compare previous ILL to new ILL)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Circulation</td>
<td>Confirmed by</td>
<td>Date</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
<td>--------------</td>
<td>------</td>
</tr>
<tr>
<td>Search for borrowers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>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</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Open new borrower and inform library of number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Loan the new item you entered to the new borrower</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test renewal, renew all, return, whatever fine regime is used</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test overdue/courtesy notice generation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compare cash transactions between test server data and production server data of the previous version.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activate and check self-check server transactions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run p_cir_60 and p_cir_65 in order to check advanced booking function. (Only on test server)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Web OPAC</th>
<th>Confirmed by</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign in as the user you entered above</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confirm that your loan appears correctly as “user” in Web</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confirm that your information appears in “user” correctly</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search for the record you created, then click “items” and confirm that you see that it is on loan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Try keyword and browse searches, in full and in logical bases</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use basket and e-shelf, e-mail results to yourself</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check customization generally, menus and navigation links</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Connect to a remote link</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verify that Course Reading works</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ensure character display of foreign characters and diacritics is correct</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verify that related searches (tab_service) are working</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verify that ‘limit’ functionality works OK</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check the sorting of records</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check analytical records for connections between main analytical records and locations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>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.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Course Reading

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

### Search in GUI Modules

<table>
<thead>
<tr>
<th>Activity</th>
<th>Confirmed by</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for records via various fields</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Browse for records via various fields</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add records to navigation map and send to different modules</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ensure character display of foreign characters and diacritics is correct: Font.ini must have appropriate settings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verify that related searches (tab_service) are working</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Z39.50

<table>
<thead>
<tr>
<th>Activity</th>
<th>Confirmed by</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check all Z39.50 targets for standard searches</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do tables cater correctly for translation of diacritics and foreign characters?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### MetaLib/SFX

<table>
<thead>
<tr>
<th>Activity</th>
<th>Confirmed by</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need to check that ALEPH resource in MetaLib works.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Need to check interactions between ALEPH/SFX/MetaLib. Do deep links work correctly? ALEPH as an SFX source. ALEPH as an SFX target.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### X-server

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

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

<table>
<thead>
<tr>
<th>Publishing</th>
<th>Confirmed by</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure new set in xxx01/tab/tab_publish</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run p_publish_04 with the new set.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run p_publish_05 on part of the new set</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run p_publish_06 on new set</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 10. 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.