

ALEPH Implementation: Notes from the Field

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Cover Story

[ALEPH Implementation](#)

Features

[Are You Getting Enough? SFX and Links to Related Resources](#)

[STB STP](#)

[SUNYConnect Core Database Selection... Process](#)

[Prod and Dev 101](#)

[ALEPH and BI](#)

[Additional SUNYConnect Updates](#)

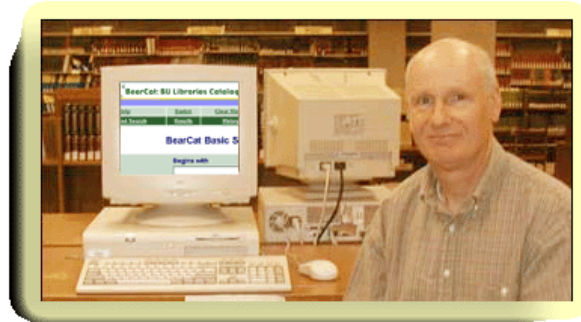
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[Linkable Links](#)

[Link to the SUNYConnect Committees List](#)

Binghamton's ALEPH STP (switch to production) was on January 2, 2002, the beginning of a new year and end of a full year of preparation for this event. Was it a stressful year? - yes. Was it an incredibly busy year? - yes. Was it a fun year? - yes!

When we started the project we were naive and wide-eyed. We would go in, tackle all the problems and bring up the new system in a couple of months. The reality: a full year including delays and some re-inventing of the wheel. One of the first things we needed to do was to set up our indexes. How hard could that be - after living with about 5 NOTIS indexes for the last 11 years, we were determined to index everything, and we pretty much did. Our patrons now have searching capabilities for uniform title (so important in music), a separate series search, a publisher search, language searches, titles in enhanced contents notes actually indexed as a title and not just as a keyword search, to name a few. But the decisions were not all that easy. Just as an example, what is the difference between the ALEPH-specific fields LOC, PST and PSTS? The choices we made had effects later that we never envisioned. Those decisions took a lot of thinking and rethinking and we changed our policies at least a dozen times. But, working with Ex Libris, we think we have finally made decisions we can live with (at least for now).



Subsets were our next task. Binghamton's collection is large enough that we needed to use a subset of about 40,000 records in our test loads. Ex Libris warned us early on how important the subset would be. The staff chose the records for the subset, each person choosing records from their specialty, representing our monographs, serials, maps, electronic resources, visual materials, unlinked item records, order records and representing all the languages our catalog contained. Our subset worked well through our seven test loads and this enabled us to pinpoint data conversion problems. Staff members were each responsible for checking the records they had chosen in each subset, reporting problems they found. Checking data conversion really worked well as a team effort and some of the biggest problems we found were by someone in Cataloging, Serials or Acquisitions casually saying, "why is such and such happening?" Our bibliographic data converted very cleanly; it was the "other" things that were problematic.

One of our biggest challenges has been [Unicode](#). Working very closely with Ex Libris we are currently able to display records in vernacular Arabic and have tested Chinese, Japanese and Korean in the vernacular.

The various ALEPH configuration tables have been [another challenge](#). When we started we had no idea of what these tables were, much less how powerful they are. If there is a problem related to the data, chances are it is a problem with a table. But the reverse is also true and if you want the data to behave or look a particular way, chances are you will be able to do that with a table. So while you may be puzzled at first by the differences between edit_doc.eng, edit_doc_999.eng, edit_field.eng and edit_paragraph.eng, once you figure it out you realize you can customize your data almost any way you want.

Yet another "challenge" has been our use of authority records. We decided that we would want to utilize ALEPH's capabilities to flip our headings by setting our "UPD" (update the heading code) to "yes". Oops, that caused a few problems when "ambiguous" headings started flipping the wrong way and, for example, our headings for "Internet" were changed to "International Project Management Association". But we were able to utilize the reports that ALEPH can generate and have been working to get the best of both worlds, headings that correct themselves without updating ambiguous headings. And as a plus to that problem, we learned how to utilize ALEPH "global change" functions, which we have found to be very powerful!

We needed to develop interfaces to import patron data from administrative sources and to export delinquency data to the campus student system. The patron record import into ALEPH (the "PLIF"-Patron Load Import Format) proved to be straightforward to implement and now runs daily.

The delinquency or "bursar" interface was more complicated. Partially this was due to differences in the data between NOTIS and ALEPH. Development of this interface took six months to complete. But, we now export information for every unpaid fine, fee or overdue unreturned library material nightly to the student accounts department.

Here are some of the things we learned from this project:

- The fantastic thing about ALEPH is its flexibility. The maddening thing about ALEPH is its complexity.
- It's the tables, stupid! Make sure that decision-making is in the hands of those who best understand the policies, procedures and functions at your library. At Binghamton, as a result, much of the configuration was decentralized and delegated, much of the table configuration was done directly by Circulation, Acquisitions, and Cataloging staff rather than by the Systems staff.
- The web OPAC was a lot of work and required a good understanding of HTML and other interconnected files. We got valuable help from OLIS staffer Laura Murray in our initial OPAC design.
- Take advantage of the ability to set up "logical bases" for your web OPAC. This feature is easy to set up and very powerful. Binghamton has been able to provide separate searching of [journals](#), [government documents](#), [electronic resources](#), and other useful subsets of our database via this feature.
- Follow up all Ex Libris training sessions with ongoing in-house training. It is important that staff can get up to speed prior to STP.
- Take advantage of the conversion to get rid of unwanted records and database problems. Clean up database messes before you migrate if you can.
- Get the staff-side search software up quickly and distribute it widely. This so called "GUI OPAC" is the heart of ALEPH and its use should be promoted for all staff access.
- Get rid of Netscape 4.7 everywhere on your campus. It does not work well with ALEPH. Make sure browsers are at least IE 5.5 or Netscape 6.2. Make sure that all equipment has the Unicode font installed. You will be amazed how many names have special characters, even if your library has few non-english materials.
- Upgrade PC's to Windows 2000 or XP. Faster equipment with more memory greatly speeds performance.
- Patron empowerment functions are a major service enhancement and need to be emphasized.

Being a pilot for the SUNYConnect LMS project has been an amazing learning experience, to say the least. We spent the year on a roller coaster of frustration and elation, learning to deal with each problem as it arose. While [Binghamton's ALEPH](#) is not yet perfect, we certainly hope that the new concepts it offers our patrons: "hot links" to subjects and authors as well as to web-based resources, vernacular language opportunities, our logical bases that allow the patrons to search subsets of our data (such as electronic resources only) are only the beginning of the potential the system has to offer.



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