Regardless of whether your institution is experiencing staff turnover, planning to make configuration changes, or simply wishing to know all of your setup options, the Ex Libris training department has an assortment of ALEPH system configurations classes to fit your needs.

**Our New Training Model**
For improved learning and the elimination of travel costs, ALEPH Continuing Education training is now provided in a new blended training format.

Our blended training curriculum consists of both live web training sessions and pre-recorded courses:

- The live web tables configuration classes allow you to attend from the comfort of your own office and are in manageable 3-hour time slots, giving you more time to schedule your training around your work responsibilities.
- Our pre-recorded courses are 5-6 hours in length and are equivalent to a full days worth of training, except unlike a live class you may view these at your leisure.
- Please see [Course Offering and Schedules](#) below for a list of classes and fees.

**Bonus: Prerequisite Recordings**
For a limited time only, we will offer the pre-requisite recording(s) for each course without charge. There is time allotted to ask questions about the pre-requisite recordings during the first session of each series.

**ALEPH Training Classes**
ALEPH training classes are web based sessions conducted by a trainer in real time. Classes are typically designed for no more than six trainees so that individual attention can be provided. Hands-on activity is a key component of all ALEPH classes, each class includes the opportunity for participants to navigate and discuss their institution's configuration tables.

**About our Trainers**
Our training consultants have in-depth knowledge of the ALEPH system. And recognizing that different learning styles commonly exist in a single class, the trainers are also skilled at utilizing different training methods and can adjust their approach to fit the audience.
Training Database
Training will be presented on an Ex Libris training server using the USM training database. However, as part of the hands-on component, attendees are expected to navigate within the production environment of their test server in order to compare their institutions setup with the Ex Libris training setup.

Training Materials
Typical training materials used for ALEPH classes include the System Librarian Guide, the Staff User Guide, training examples, and tip sheets. Materials will be delivered after registration with your formal invitation to the web class.

System Requirements
For Live Web Sessions:
- Speaker phone with external phone line & two computers:
  - **Computer A** is for viewing presentation, requires Windows 98 or higher, Microsoft Internet Explorer 5 or higher OR Netscape 4.7 or higher
  - **Computer B** is for hands-on activity and requires Windows 98 or higher, Microsoft Internet Explorer 5 or higher, ALEPH version 18 client, and telnet application. Get free PUTTY, [http://www.chiark.greenend.org.uk/~sgtatham/putty/download.html](http://www.chiark.greenend.org.uk/~sgtatham/putty/download.html)

For Training Recordings Sessions:
One computer for presentation and hands-on activity with Windows 98 or higher, soundcard, flash enabled browser (Microsoft Internet Explorer 5 or higher or Netscape 6 or higher), ALEPH version 18 client, and telnet application. Get the free PUTTY application, [http://www.chiark.greenend.org.uk/~sgtatham/putty/download.html](http://www.chiark.greenend.org.uk/~sgtatham/putty/download.html)

Request Additional Courses for 2008
Currently, only table configuration classes are offered. However, please contact us if you are in need of functionality training so that we may know whether to add these classes into the Spring 2008 curriculum. Ex Libris can also create customized training plans for institutions with unique needs or preferences. Customized training plans contain elements and timelines reflective of a specific implementation and can be adjusted as the project unfolds.
Course Offerings & Schedule:
We currently offer three training tracks, courses can be taken in any order as long as the prerequisites are fulfilled.

### Indexing Track: Recommended for system librarians and those making indexing decisions

<table>
<thead>
<tr>
<th>Course</th>
<th>Delivery</th>
<th>Prerequisite</th>
<th>Live Web Consultation Dates</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Tables</td>
<td>Live Web Sessions</td>
<td>System Librarian 1 recording, included as bonus</td>
<td>Four part series scheduled on August 24, 27, 29 &amp; 31, 2007 from 12:30 pm to 3:30 pm (CT)</td>
<td>Available upon request</td>
</tr>
<tr>
<td>Search Tables (repeat)</td>
<td>Live Web Sessions</td>
<td>System Librarian 1 recording, included as bonus</td>
<td>Four part series scheduled on October 15, 17, 19 &amp; 22, 2007 from 12:30 pm to 3:30 pm (CT)</td>
<td>Available upon request</td>
</tr>
</tbody>
</table>

### Public Services Track: Recommended for system librarians and public service managers

<table>
<thead>
<tr>
<th>Course</th>
<th>Delivery</th>
<th>Prerequisite</th>
<th>Live Web Consultation Dates</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circulation Tables/CR</td>
<td>Live Web Sessions</td>
<td>System Librarian 1 recording, included as bonus</td>
<td>Four part series scheduled on September 7, 10, 12 &amp; 14, 2007 from 12:30 pm to 3:30 pm (CT)</td>
<td>Available upon request</td>
</tr>
<tr>
<td>Web OPAC Customization Recording</td>
<td>Pre-recording</td>
<td>Web OPAC Functionality recording, included as bonus</td>
<td>Live trainer available to registered students for one Web OPAC questions &amp; answer session on either September 24 or 25, 2007 from 12:30 pm to 3:30 pm (CT). Attendance is optional.</td>
<td>Available upon request</td>
</tr>
<tr>
<td>Reports &amp; Notices (Sys Lib 3)</td>
<td>Pre-recording</td>
<td>System Librarian 1 recording, included as bonus</td>
<td>Live trainer available to registered students for one Reports &amp; Notices questions &amp; answer session on either September 26 or 27, 2007 from 12:30 pm to 3:30 pm (CT). Attendance is optional.</td>
<td>Available upon request</td>
</tr>
</tbody>
</table>

### Technical Services Track: Recommended for system librarians & technical service managers

<table>
<thead>
<tr>
<th>Course</th>
<th>Delivery</th>
<th>Prerequisite</th>
<th>Live Web Consultation Dates</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cataloging Tables</td>
<td>Live Web Sessions</td>
<td>System Librarian 1 recording, included as bonus</td>
<td>Four part series scheduled on October 24, 26, 29 &amp; 31 from 12:30 pm to 3:30 pm (CT)</td>
<td>Available upon request</td>
</tr>
<tr>
<td>Serials Tables</td>
<td>Live Web Sessions</td>
<td>System Librarian 1 recording, included as bonus</td>
<td>Two part series scheduled on November 13 &amp; 15, 2007 from 12:30 pm to 3:30 pm (CT)</td>
<td>Available upon request</td>
</tr>
<tr>
<td>Acquisitions Tables</td>
<td>Live Web Sessions</td>
<td>System Librarian 1 recording, included as bonus</td>
<td>Three part series scheduled on December 11, 13 &amp; 17, 2007 from 12:30 pm to 3:30 pm (CT)</td>
<td>Available upon request</td>
</tr>
</tbody>
</table>
Fall 2007 ALEPH Syllabus

Search Tables (Live)
The ability to search and retrieve many types of records is vital to all of your ALEPH applications. Join the Search Tables sessions to learn how to define and customize your indexes and Staff Search functionality.

Goals: Prepare participants to configure indexing and Staff Search functionality

Prerequisites: System Librarian 1, satisfied by viewing free recording or previous onsite attendance; Knowledge of basic UNIX, VI, and ALEPH system architecture.

Audience: System librarians and library managers responsible for indexing and search functionality decisions

Class Size: 1 individual per registration, limited to 6 total

Class Length: Four 3-hour sessions. Attendance in each session is required.

Training Mode: Live web delivery

Fee: Available upon request

Session One: Indexing Overview and Definition:
- Introduction
- Document Overview
- Brief review of System Librarian Recording
- Indexing Overview
- Defining indexes:
  - Field codes and names, for indexes (tab00.eng)
  - List of tags for MARC records (tab01.eng)
  - Assignment of fields to headings indexes (tab11_acc)
  - Assignment of fields to Direct indexes (tab11_ind)
  - Assignment of fields to word indexes (tab11_word)

Session Two: Advanced Indexing Configuration:
- Brief review of Session One
- Filing and normalization of heading indexes
  - Definition of filing and normalization routines (tab_filing)
  - Field codes and names, for indexes (tab00.eng)
  - Assignment of fields to headings indexes (tab11_ind)
  - Assignment of fields to word indexes (tab11_word)
- Defining how compound words are indexed
  - Word breaking specifications (tab_word_breaking)
- Expanding non-standard bibliographic information into indexes
  - Routines for building new (virtual) fields
Routines for indexing fields
Displaying and indexing copy information
Building the indexes using Cataloging services
  Update Word Index (manage-01)
  Update Headings Index (manage-05)
  Update Direct Index (manage-02)

Session Three: Basic Search Tab Configuration:
  Brief review of Session Two
  Adding indexes to the GUI interface
    Definitions of GUI search options (pc_tab_sear.eng)
  Adding indexes to Web OPAC include files
  Client setup related to search:
    General GUI definitions (alephcom.ini)
    Module specific GUI definitions (guisys.ini)
  Settings in tab100 related to Search
  Settings in pc_server_defaults related to Staff Search
  Fields for sorting in OPAC and Staff Search (tab_sort)
  Creating logical bases
    Definitions of databases (tab_base.eng)
    Staff Search database list (searbase.dat)
  Find queries: Client setup and Boolean operators setup
    alephcom.ini
    Definition of CCL Boolean operators (tab_ccl_boolean_operators)

Session Four: Advanced Search Tab Configuration:
  Brief review of Session Three
  Configuring document (bibliographic) display
    Display of the 'Brief format' of a record (pc_tab_short.eng)
    Format definition for GUI/WWW display (edit_doc.eng)
    Paragraphs for displaying bibliographic information (edit_paragraph.eng)
    Editing of Fields and Headings for OPAC display and Print (edit_field.eng)
    Full format for printing and viewing (edit_doc_999.eng)
    Record conversion format for export to reference manager (edit_doc_777)
  Column headings:
    Display of the 'Brief format' of a record (pc_tab_short.eng)
    Definition of columns in GUI screens, server-side (pc_tab_col.eng)
    Definition of columns in GUI screens, client-side (tab_col.dat)
  Configuring the Locate function:
    Procedures for locating a record in other libraries (tab_locate)
    List of databases for Locate button (locate.dat)
  Default text for links:
    Captions for links between records (tab05.eng)
Circulation/Course Reserves Tables (Live)

Interested in implementing a change to your circulation policy? Join the Circulation/Course Reserves Tables sessions to learn how to customize your circulation functionality to better fit your institutions needs.

Goals: Prepare participants to configure Circulation and Reserves functionality

Prerequisites: System Librarian 1, satisfied by viewing free recording or previous onsite attendance; Knowledge of basic UNIX, VI, and ALEPH system architecture.

Audience: System librarians and library managers responsible for indexing and search functionality decisions

Class Size: 1 individual per registration, limited to 6 total

Class Length: Four 3-hour sessions. Attendance in each session is required.

Training Mode: Live web delivery

Fee: Available upon request

Session One: Circulation Overview and General Configuration
- Introduction
- Document Overview
- Brief review of System Librarian Recording
- General Tables:
  - Collections (tab40)
  - Material type (tab25)
  - Item statuses (tab15)
  - Sublibraries (tab_sublibrary)
  - Relations between libraries (library_relation)
- Patrons:
  - Statuses (tab31)
  - Blocks (tab_delinq.eng)
  - Valid Dates of Addresses (tab_bor_address)
  - Expiration of registration (tab30)
  - Fast registration (tab_fast_patron_register)
  - IDs (tab_bor_id.eng)
  - Remote patron registration settings
  - System-wide behavior in regards to patron ID records (tab_bor_id.eng)

Session Two: Configuring Loan, Return & Renewal Policies
- Brief Review of Session One
- Defining Due Dates, Limits, & Fines
  - Due dates and limits (tab16)
  - Time and rate for fine method "F" (tab_late_return)
  - Lost material costs (tab34)
- Setting Open Hours:
Circulation Transaction Checks and their override:
- Checks for loan/renew (tab_check_circ)
- Parameters for blocking loans (tab_block_circ)
- Minimum user level for override (check_circ_override)

Controlling Cash:
- Sublibrary relationships (tab_attr_sub_library)
- Cash transaction types (tab18.eng)
- Definition of cash (z31) sort types (tab_z31_sort)
- Sublibrary translation to campuses (cash_09_translate)
- Cash transactions details display (user_cash)

Scheduling Overdue Notices:
- Overdue notices (tab32)

Defining Item Reshelving Time:
- Item reshelving time (tab14)

Session Three: Hold and Photocopy Requests/Remote Storage/Course Reserves

- Brief Review of Session Two

- Hold and Photocopy Requests:
  - Checks for hold requests (tab_hold_request)
  - Checks for photocopy requests (tab_photo_request)
  - Hold requests pick-up list configuration (tab 37)
  - Photocopy requests configuration (tab38)
  - Hold shelf time period (tab44)
  - Hold requests send method configuration (tab27)
  - Hold request daemon configuration (tab39)
  - Request daemon time period variable (prof_library.conf)
  - Photocopy request daemon configuration (tab41)
  - Different Hold Request Forms (tab_hold_request_form)

- Delivery Times for remote storage (tab24)

- Course Reserves Setup:
  - Sublibraries (tab_sub_library.eng)
  - Collection Codes (tab40)
  - Item Statuses (tab15.eng)
  - Due dates, fines, and limits (tab16)
  - Library open/close hours (tab17)
  - Borrower Statuses (tab31)
  - web files (www_r_eng/files)

Session Four: Circulation GUI Setup & Logging

- Brief review of Session Three

- Sublibrary and workstation attributes for Circulation:
  - Workstation ID
Sublibrary relationships based on station ID / IP address (tab_attr_sub_library)

**Catalog Item:**
- Fast catalog configuration (pc_tab_circ_fast_cat.eng)

**Fast circulation:**
- Fast circulation configuration (pc_tab_fast_circ)

**Item history:**
- (tab_item_history.eng)

**Circulation-related entries in various tables:**
- Circulation system switches (tab100)
- Circulation environment variables (pc_server_defaults)
- Definition of GUI drop-down menus (pc_tab_exp_field.eng)
- Definition of GUI sublibrary sensitive drop-down menus (pc_tab_exp_field_extended)
- Web server configuration file (www_server.conf)
- ALEPH configuration file (aleph_start)

**Client setup:**
- Circulation GUI definition file (circ.ini)

**Display and sort-related tables:**
- Names of days and months (tab_days and tab_month)
- Column Headings (pc_tab_col.eng)
- Sort of loan records (tab_z36_sort)
- Sort of item records (tab_z30_sort)
- Column headings (pc_tab_col.eng and tab_col.dat)

**Logging:**
- Log event types writing to Z35 (tab_events.eng)
- Log circulation transaction types (tab_circ_log.eng)

### Reports & Notices (Recording)

The ability to search and retrieve many types of records is vital to all of your ALEPH applications. Join the Search Tables sessions to learn how to define and customize your indexes and Staff Search functionality.

**Goals:**
Prepare participants to configure reports and notices for print and email delivery

**Prerequisites:**
System Librarian 1, satisfied by viewing free recording or previous onsite attendance; Knowledge of basic UNIX, VI, and ALEPH system architecture.

**Audience:**
System librarians and library managers responsible for indexing and search functionality decisions

**Class Size:**
1 individual per registration, limited to 6 total

**Class Length:**
Four 3-hour sessions. Attendance in each session is required.

**Training Mode:**
Training Recording with two hour live web Q&A consultation with trainer.
Fee: Available upon request

Reports & Notices Recording Agenda:
- Introduction
- General
- XSL Creator
- Making Templates Available
- Advanced XML/XSL
- Online Reports and Notices
- Defining Print & Email Addresses
- Email Configuration
- Managing Batch with Task Manager
- Batch Job Automation
- Using HTMLPrint
- Importing into MS Excel
- Item Labels

Web OPAC Customization (Recording)

The ability to search and retrieve many types of records is vital to all of your ALEPH applications. Join the Search Tables sessions to learn how to define and customize your indexes and Staff Search functionality.

Goals: Prepare participants to customize their Web OPAC
Prerequisites: System Librarian 1, satisfied by viewing free recording or previous onsite attendance; Knowledge of basic UNIX, VI, and ALEPH system architecture.
Audience: System librarians and library managers responsible for indexing and search functionality decisions
Class Size: 1 individual per registration, limited to 6 total
Class Length: Four 3-hour sessions. Attendance in each session is required.
Training Mode: Training Recording with two hour live web Q&A consultation with trainer
Fee: Available upon request

Web OPAC Customization Recording Agenda:
- Introduction
- Guided Tour
- Overview of Files
- Server Connections
- Server Connections
- Server Functionality
Cataloging Tables (Live)

The Cataloging module is the backbone to the ALEPH system. To learn more about configuring this essential module join the Cataloging Tables sessions.

Goals: Prepare participants to configure Cataloging functionality
Prerequisites: System Librarian 1, satisfied by viewing free recording or previous onsite attendance
Knowledge of basic UNIX, VI, and ALEPH system architecture
Audience: System librarians and library managers responsible for indexing and search functionality decisions
Class Size: 1 individual per registration, limited to 6 total
Class Length: Four 3-hour sessions. Attendance in each session is required.
Training Mode: Live web delivery
Fee: Available upon request

Session One: Cataloging Overview and General Configuration:
- Introduction
- Document Overview
- Brief review of System Librarian Recording
- Entries in tab100 related to Cataloging.
- Entries in pc_server_defaults related to Cataloging.
- Client setup (catalog.ini and alephcom.ini)
- Drop-down lists:
  - Definition of GUI drop-down menus (pc_tab_exp_field)
  - Definition of sublibrary sensitive GUI drop-down menus (pc_tab_exp_field_extended)

Session Two: Cataloging Template & Items List Setup
- Record formats (formats.eng)
- Templates, Tag forms, Default fields, subfields, and values thereof in various contexts:
  - marc_exp.dat
  - tagonnew.dat
  - tab_tag_text
- Valid fields (codes.eng)
- Tag information (taginfo.eng)
- Search setup (scancode.dat and tag_text.dat)
- Column headings (pc_tab_col.eng and tab_col.dat)
- Floating keyboard (keyboard.* and font.ini)
- Item sort (tab_z30_sort)
- Punctuation (tab_subfield_punctuation)

**Session Three: Cataloging Checks, Fixes & Authorizations:**
- Record validation and messages, forbidden errors and triggers (check* tables)
- Fix routines (tab_fix and fix_doc)
- Authorizations: Allowed and denied tags (permission.dat)
- Cataloging "own" permissions (tab_own)
- Holdings filter (tabOwn)

**Session Four: Setup for Importing and Converting Records:**
- List of merge routines (tab_merge)
- List of fix_doc programs (tab_fix)
- Conversion definition file (convert.ini)
- List of remote conversion programs (pc_tab_cat_conv)
- Configuration table for the OCLC server (tab_oclc)
- List of merge routines (tab_merge)
- Match specifications (tab_match)
- Matching for OCLC (tab_match_script_oclc)
- Default values for item records created using OCLC/RLIN loader (tab_z30)
- Definition of mapping values when creating records in ue_03 (tab_mapping)
- Fields to retain when overlaying (merging) catalog records (tab_merge_overlay)

**Serials Tables (Live)**
Interested in making changes to your Serials configuration files? Join the Serials Tables sessions to learn what your options are.

**Goals:** Prepare participants to configure Serials functionality

**Prerequisites:** System Librarian 1, satisfied by viewing free recording or previous onsite attendance

**Knowledge of basic UNIX, VI, and ALEPH architecture.**

**Audience:** System librarians and library managers responsible for indexing and search functionality decisions

**Class Size:** 1 individual per registration, limited to 6 total

**Class Length:** Four 3-hour sessions. Attendance in each session is required.

**Training Mode:** Live web delivery

**Fee:** Available upon request

**Session One: Serials Overview and Basic Configuration:**
- Introduction
- Document Overview
- Brief review of System Librarian Recording
Serials-related switches in tab100.

Client setup:
- Serials client definitions (serials.ini)
- ALEPH client definitions (alephcom.ini)

Column headings (pc_tab_col.eng)

Drop-down menus:
- Definition of GUI drop-down menus (pc_tab_exp_field)
- Definition of sublibrary sensitive GUI drop-down menus (pc_tab_exp_field_extended)

General Setup:
- Collections (tab40)
- Material type (tab25)
- Item statuses (tab15)
- Sublibraries (tab_sublibrary)

Sort options for items (tab_z30_sort)

Session Two: Serials Advanced Configuration:

Publication pattern creation and import:
- Chronographic terms (853_chrono)
- Ordinal suffixes (853_numbering)
- Table for "matching" fields for p-serial-52 (tab_85x_import)

Automatic Changes in item process status of issues (tab42)

Order log (tab45)

Serials-related authorization functions (user_func.eng)

Summary holdings statements expand and fix routines:
- List of checksum programs (tab_checksum)
- List of expand programs (tab_expand)
- Holding statement expands (expand_doc_hld_stmt)
- Holding statement fixes (fix_doc_hld_stmt)

Binding alerts (tab_binding)

Acquisitions Tables (Live)

The Acquisitions Tables sessions provides participants with the knowledge necessary to customize Acquisitions module functionality and GUI display.

**Goals:**
Prepare participants to configure indexing and Staff Search functionality

**Prerequisites:**
System Librarian 1 (free recording or previous onsite attendance); Knowledge of basic UNIX, VI, and ALEPH system architecture.

**Audience:**
System librarians and library managers responsible for indexing and search functionality decisions

**Class Size:**
1 individual per registration, limited to 6 total
Class Length: Four 3-hour sessions. Attendance in each session is required.
Training Mode: Live web delivery
Fee: Available upon request

Session One: Acquisitions Overview and Switches:
- Introduction
- Document Overview
- Brief review of System Librarian Recording
- Acquisitions-related entries in tab100

Session Two: Acquisitions Basic System Configuration:
- Acquisitions environment settings (pc_server_defaults)
- Client setup:
  - Acquisitions client definitions (acq.ini)
  - ALEPH client definitions (alephcom.ini)
- Drop down menus:
  - Definition of GUI drop-down menus (pc_tab_exp_field)
  - Definition of sublibrary sensitive GUI drop-down menus (pc_tab_exp_field_extended)
- Column headings (pc_tab_col.eng)
- Quick cataloging (pc_tab_acq_fast_cat.eng)
- Counters for Acquisitions:
  - Counter creation utility (Util G/3)
- Setup for two-level vendors:
  - Definition for two-level vendor fields (tab_vendor_sub_lib)
- Budget and vendor code prefixes:
  - Prefixes for budget code, vendor code and ILL supplier code (tab_code_prefix)
  - List of checksum programs (tab_checksum)
- Invoice payment status:
  - General invoice payment status (tab48.eng)

Session Three: Acquisitions Advanced System Configuration:
- Automatic item creation:
  - Item creation switch (tab100)
  - Defaults for automatic opening of Monograph-type items in Acquisitions (tab36)
- Automatic changes in item process status (tab42)
- Setup for EDI:
  - EDI incoming messages special attributes (edi_in_attr)
  - EDI outgoing messages special attributes (edi_out_attr)
  - EDI settings in tab100
  - Location numbers and other information for EDI orders (tab35)
- Order index (tab_acq_index)
- Order log (tab45)