



ALEPH VERSION 21

Configuration Questionnaire: Logical Bases and Indexing

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1. Introduction

The purpose of this configuration questionnaire is to help both Ex Libris and the customer customise logical bases and indexes if applicable for your library.

Please review this questionnaire and complete your answers in the Customer Reply Form – an Excel spreadsheet file that accompanies the questionnaire.

The questionnaire is intended for libraries using the MARC 21 bibliographic formats.

The numbers of the headings in the Instructions section correspond to the number of the headings in the questionnaire section.

Note

denotes a wildcard character

\$\$ denotes a subfield.

2 The Bibliographic Library and Logical Bases

The Bibliographic database contains bibliographic records which describe bibliographic material of all types.

A central concept of the Bibliographic database is that of “logical bases”. A logical base is a subdivision of the Bibliographic database. Logical bases can be defined for practically any group of records – by subject, material type or location.

2.1 How Many Bibliographic Libraries?

Normally, one library will have one Bibliographic database that represents the sum of its collection in bibliographic terms – even if these holdings are spread across several administrative units.

When would you have multiple Bibliographic libraries? If the cataloguing practices of two libraries are different, and each wants its own version of the bibliographic record, and they want to prevent cataloguers from the other library from updating their bibliographic records, they should be defined as separate Bibliographic Libraries.

Another reason to have separate Bibliographic databases is the existence of different kinds of data that require separate cataloguing procedures, search strategies and display formats, so that it may be preferable to catalogue and search them separately. For example, an installation that also has an archive may decide to have a separate database for this material.

In almost all situations, it is possible either to split or to merge the Bibliographic records.

There are several points to consider in making the decision:

Search. Will the user normally want to search the material together/separately?

Generally, the need to have separate OPAC indexes is not a reason to define separate Bibliographic Libraries, since by defining bases it is possible to generate indexes which contain entries for only a particular location or material type. Each base can also define its own user interface in the WWW OPAC.

2. 1 Logical Bases

Do you think you will want to define logical bases?

If you do, fill in the parallel section of the Customer Reply Form with the following information.

In the description, please explain the characteristic by which a record belongs to the base.

Base Name	Description

Complete the parallel section of the Customer Reply Form.

3 Indexes

Bibliographic records are indexed so that they can be retrieved in the OPAC and/or the GUI search functions. ALEPH has three types of indexes:

Headings Indexes – headings indexes are created from complete phrases – for example, title, authors, subjects. Headings indexes are created from the complete field or specified subfields from the field. Browse type search is generally based on headings indexes.

Word indexes – word indexes are created from individual words. Words can be added to a “General” word file and/or specific word files such as “words from authors”, “words from titles”, “words from subjects”. Free-text search is generally based on word indexes.

Direct indexes – headings and word indexes have a one-to-many structure. Every heading and word can be linked to multiple records. Direct indexes have a one to one structure and are generally used for bibliographic identifiers like the ISSN, ISBN, LCCN and call numbers.

Indexes are defined in configuration tables that can be modified locally. We recommend that you start with the standard setup and make changes if you have different or additional requirements

The standard setup generally includes the following indexes:

Headings indexes:

Titles

Authors

Authors + Titles

Series

Subjects (Including General, Local, LC and Mesh Subjects)

Place of Publication

Publisher

Classifications (Library of Congress Classification; Government Classification; Dewey Classification; NLM Classification)

Direct Indexes:

Identifiers (ISBN;ISSN; SICI; ISMN; Music Publ. Number; LCCN; System Control Number)

Call Numbers (Separate Indexes for Different Shelving Schemes, Created From Data Expanded From Attached Holdings/Items)

Word Indexes:

All-Words

Titles

Authors,

Subjects

Series

Keywords

Publisher

Notes (Index Created From Note-Related Fields/Subfields)

Year,

Language

Holdings information (Sublibrary; Collection; Location)

Do you think you have special requirements? For example, do you need to index any locally defined fields? If you do, fill in the parallel section of the Customer Reply Form with the following information:

Index type:

Heading

Word

Direct index

Index code – three characters. Note that word indexes always start with W.

Index name – up to 20 characters

Derived from fields and subfields: list the fields and subfields from which the index should be created. Use the dollar sign to indicate a subfield. Use ## to indicate any indicators

For example:

Index type	Index code	Index name	Derived from the following fields and subfields:
Word	WLF	Local field	970## \$a, \$b 971## - all subfields except for \$6