

talis



The Lyra programme



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Executive summary

Common standards play an essential part in the interoperability that libraries increasingly depend upon for the efficient delivery of their services. Consequently, changes to the MARC format and the ISBN cannot be ignored.

To help minimise the disruption that these changes could potentially cause, Talis has created the Lyra programme. This programme exists to enable libraries with Talis systems to adapt easily and with confidence.

At the same time, the Lyra programme also takes the opportunity to deliver substantial improvements in the functionality of bibliographic management and resource discovery.

1. The need for change in fundamental standards

Changing fundamental standards

Today's libraries face changes to two fundamental standards in the bibliographic world, MARC and ISBN.

MARC

MARC 21 is now the agreed standard format for bibliographic and related data in UK libraries, as it already is for many other countries including the US, Canada and Australia. The MARC format was the first and most successful standard to facilitate computer interoperability between libraries and, today, that interoperability is more important than ever. With it, libraries can maximise efficiency in bibliographic management and support user services that give easy access to data stored all over the world.

The ISBN

The International Standard Book Number (ISBN) is an indispensable product identifier in our systems. Many essential operations depend upon it. From the 1st January 2007, the ISBN will contain 13-digits instead of 10 to provide a greater range of numbers. This may seem a banal change, but it impacts our systems in many vital places and non-compliance with the new standard would mean that a library would soon cease to be able to function effectively.

What is the Lyra programme?

First and foremost, the Lyra programme exists to enable libraries with Talis systems to adapt to changes to these fundamental standards with minimal disruption to normal library operations.

Beyond this, the Lyra programme takes full advantage of this need for change by simultaneously reinvigorating Talis products. Applying advanced technology and standards-based design will make bibliographic management and resource discovery more functional, flexible and interoperable, and enable the library to improve services, increase productivity and reduce costs.

2. How does the Lyra programme help libraries make the necessary changes?

Adapting with minimal disruption

In order to help libraries to adapt to the change in standards with minimal disruption, the Lyra programme has created a phased approach to the product developments.

The provision of dual cataloguing environments during the first phase enables libraries to learn and become accustomed to working in MARC 21 whilst still having the familiar Talis MARC environment available. This approach also allows libraries to take advantage of some

of the benefits of the changes sooner rather than later, such as the display of non-Latin scripts in Talis Prism.

A library's catalogue is a valuable asset that represents a large investment, so great care has been taken to ensure the quality of the conversion and to provide for local needs. This has been a primary concern for Talis in the development of the Lyra programme.

For the conversion process we have designed software that will make optimal use of a library's hardware to rapidly convert records whilst systems continue to run normal operations. There will be little or no down time and no cataloguing moratorium.

This process also has the flexibility to allow libraries to check results, adjust and re-run. They can select records to test-convert and view test results in the catalogue without them being seen by users. It's also possible for libraries to continue to do real cataloguing in MARC 21 before and during the conversion. They can run the conversion at any time.

It is the library that has control.

Furthermore, Talis is providing a range of documentation, support, training and consultancy to ensure that local needs are met.

For more information about the MARC conversion, a MARC Conversion Guide is available as a PDF that can be downloaded from the Lyra programme Conversion page of the Talis web site: <http://www.talis.com/lyra/conversion.shtml>

3. How does the Lyra programme improve system functionality for libraries?

Better cataloguing, better catalogue

In addition to supporting ISBN-13 and MARC 21-based bibliographic management and resource discovery, the Lyra programme will bring:

- A standards-based, comprehensive and configurable cataloguing module in Talis Alto with intuitive, efficient and flexible work flow
- Powerful new indexing and search facilities in Talis Alto and Talis Prism that are easy to use and manage, exploiting standard MARC 21 bibliographic and authority records, and providing full real-time indexing
- Configurable import, export and data management processes, with controls over bibliographic data quality
- The widest and most interoperable character set – Unicode – for cataloguing and display
- More flexible bibliographic services with a greater range of high quality data to support acquisitions and cataloguing.

There will be two phases of product releases, leading up to and following on from the conversion of bibliographic and authority records.

4. The phases of the Lyra programme

Adopting a phased approach gives libraries a coherent way to transition to the new ways of working. Each library has the flexibility needed to implement the programme in the way best suited to their local needs.

The Foundation phase

The developments in the Foundation phase give libraries essential compliance with ISBN-13 and allow them to move at their own pace from not doing any cataloguing in MARC 21 to handling all of their cataloguing in MARC 21. Implementation is as seamless as with any other product upgrade. Records added to or modified in the MARC 21 store are copied and converted to the TalisMARC environment for indexing and to support the other library functions such as acquisitions and circulation. Search, within both Talis Alto and Talis Prism, is via the current indexes, which remain unchanged in all respects including structure, character-set and update timing.

ISBN-13 requirements

By 1st January 2007, libraries must be able to:

- Use 13 digit ISBNs as product identifiers in orders for new books
- Enter both 10-digit and 13-digit ISBNs as data anywhere in the system
- Retrieve a record anywhere in the system using either form of ISBN (where it is logically possible) regardless of the form in which it is held in the record

From the first product releases of the Foundation phase these capabilities are possible based on current indexes. Additionally, when searching remote databases and catalogues from within Talis Alto or Talis Prism, libraries will be able to retrieve records (depending on the target's capabilities) using 13-digit ISBNs (including those with the 979 prefix).

Talis Prism

In the first Lyra release of the catalogue, Talis Prism 2.0, libraries can choose to display data derived from MARC 21 records in the detailed record display (alternatively, the TalisMARC equivalent record is displayed). As well as benefiting generally from the richness of these records, Unicode compliance means that Talis Prism will also display any non-Latin script, giving the catalogue a greater multicultural and scholarly reach. MARC 21 records can also be suppressed from display individually (through cataloguing in Talis Alto), giving cataloguers the freedom to experiment and familiarise themselves with the new ways of cataloguing.

Talis Alto

The first Lyra release, Talis Alto 3.0, allows libraries to:

- Move at their own pace towards cataloguing in the MARC 21 bibliographic format
- Source the high quality bibliographic records required more often and more quickly
- Edit and control the quality of MARC 21 records more easily
- Have non-Latin scripts in catalogue records

Features include:

- Dual cataloguing environments: new MARC 21 cataloguing tools co-ordinated with the existing TalisMARC facilities, with appropriate alerts to ensure the integrity of both environments and easy movement between them
- Import, store, view and edit MARC 21 bibliographic records
- Access to Talis Base 2, with more records, higher quality records and faster, more powerful and robust searching
- More flexibility in configuring remote databases for search
- Detailed validation of MARC 21 content designators, highlighting invalid or non-standard elements
- Better editing in MARC 21 with quick data entry options and clearer display with larger fonts and improved contrast

- Unicode support allowing a very wide range of characters and scripts to be imported, entered, edited and stored, with a variety of input methods including on-screen keyboard and character picker
- System control numbers: all records in the MARC 21 environment are automatically allocated a system-generated control number, with other identifiers such as ISBNs and ISSNs being entered in appropriate other fields. This removes the dependency on external numbers and the associated problems and prepares the way for more control over bibliographic management and retrieval in the Completion phase of the Lyra programme.

Talis Base

The existing Talis Base continues to be available to the TalisMARC cataloguing environment. In addition, Talis Base 2.0 is a completely new service that is automatically available in the MARC 21 environment in Talis Alto. Thanks to this, libraries will be able to increase productivity by sourcing more high quality records more quickly.

With a new technical platform, Talis Base 2.0 extends the data sets of Talis Base 1.0 and offers faster, more powerful searching. Where possible, data sets have been refreshed from source in MARC 21 format, rather than converting them from Talis Base 1.0. This includes the Library of Congress, the British Library and BDS.

In fact, more records are now available:

- The Library of Congress: The 'complete service', including serials (the CONSER database) and records for non-book materials such as music, maps and electronic resources is now available
- British Library: The full integrated catalogue, rather than just the BNB and music files, is now available
- BDS: a new database, Moving Mediata¹, covering DVD and video, is now available.

Talis Base 2.0 provides high performance searching with extensive search types and options based on the Z39.50 search and retrieve protocol Bath Profile and the US National Profile (Z39.89).

Talis Gateway

Changes to cope with the transition to ISBN-13 for book ordering are being made in Talis Gateway and this eliminates the need for changes in the message handling parts of local systems to deal with the transition period.

As messages pass through, Talis Gateway will automatically convert 10-digit ISBNs to 13 digits and update the appropriate part of the message - conforming to the BIC Guidelines for managing the transition to ISBN-13.

Talis is also working with a number of book suppliers to ensure a successful transition.

Training

Lyra Training courses are designed to meet library needs for learning to work with new product features introduced throughout the Foundation phase. Talis is running training events in seven regional locations between November 2005 and February 2006. These will be repeated in early summer 2006 and again subject to demand. For more information, visit the Training pages on the Talis Web site:

http://www.talis.com/services/training_courses/training.shtml

¹ The Moving Mediata dataset will be available free-of-charge until March 2007 and thereafter subject to change.

The Conversion phase

Once libraries have implemented the main Foundation phase product releases, they will move on to the Conversion phase. Talis provides all tools and services to enable the conversion of bibliographic and authority records to the MARC 21 format. Help with analysis and planning will be available in addition to the conversion software itself. This is being designed to make optimal use of all Talis hardware to minimise the impact on system performance and give libraries more control.

Libraries will be able to convert records, check any number of them, and if required, re-run after any alterations until they are happy with the result. This will be possible even whilst using the MARC 21 environment for real cataloguing.

MARC Conversion Guide

The MARC Conversion Guide provides information and advice, enabling libraries to prepare for the conversion of records to the MARC 21 format, to identify any bespoke requirements and to complete the conversion.

The guide includes:

- Prerequisites: what to do before starting on the conversion
- A description of the steps involved in the conversion process
- Information on specific data issues
- Details of the Standard MARC Bibliographic Mapping Rules.

The MARC Conversion Guide is now available for download from the Lyra programme Conversion page on the Talis Web site: <http://www.talis.com/lyra/conversion.shtml>

MARC bibliographic and authority conversion packages

These packages provide the tools needed for libraries to convert their records to the MARC 21 format. They will include:

- The conversion software and supporting documentation
- Talis standard mapping rules, used by the conversion software to generate MARC 21 records from a Talis Alto database. These rules provide mappings from those content designators that are defined in the Talis MARC Manual and others that have been agreed for general use.

Data conversion consultancy

If libraries wish to convert data elements that are not covered by the Talis Standard MARC Bibliographic Mapping Rules, then our Data Conversion Consultancy can:

- Analyse and advise on bespoke conversion requirements
- Make customised amendments, where necessary, to the standard mapping rules and conversion software
- Help verify conversion results

The Completion phase

This phase completes the Lyra programme by delivering those features in the programme's objectives that depend upon catalogues that have been converted to MARC 21.

The Completion phase will deliver improved search and retrieval in the local catalogue from within Talis Prism, Talis Alto and for remote users via Z39.50. Libraries will be able to build new indexes and have search options geared to MARC 21, including a high level of compliance with the Z39.50 Bath and US National Profiles. These will allow for powerful searching and real-time updating of the local catalogue.

As with the Conversion phase, Talis is designing the Completion phase to minimise disruption to the library.

Whilst the programme will be completed, the functionality will continue to be developed, building on the features delivered in the Lyra programme.

5. What do libraries need to do to benefit from the Lyra programme?

Prerequisites

Libraries must first ensure that they have suitable hardware and software to cope with the change. In line with Talis' principle of minimal disruption, the impact is light, but it is important to check and take action as necessary. The prerequisites are explained in more detail in the MARC Conversion Guide. However, the main points are:

- Server Health Check: Talis will check the ILS server and MIS server if applicable, and provide a detailed report. Please contact your Account Manager or email sales@talis.com to arrange this. At least twenty-five libraries have already had a Server Health Check and most of them have passed.
- Desktop Operating System: Windows 2000 is the minimum requirement for the Talis Alto and Talis Prism desktops, but Windows XP is recommended.
- Talis Alto and Talis Prism: the latest versions of these must be implemented throughout the library and any of their predecessor versions and products retired.

Training

Libraries should consider what training needs they might have – in both MARC 21 and the new product functionality – and talk to the Talis training team and attend training courses.

Foundation

At this stage, libraries must install Talis Alto 3.0 and Talis Prism 2.0 and start cataloguing in MARC 21, with the benefits of the new functionality and the improved resources of Talis Base 2.0. It will be necessary to examine all bibliographic procedures to work out the best balance of use of the new MARC 21 features with the familiar TalisMARC facilities.

Conversion

Libraries should read the MARC Conversion Guide and work through the preparatory steps described in it, analysing their data and deciding on any local bespoke requirements. It's important to be prepared to do all cataloguing in the MARC 21 environment after the conversion of bibliographic records.

It's also a good idea to plan and prepare for testing the conversion – against what criteria is the conversion acceptable?

Libraries should also follow the steps described in the MARC Conversion Guide, installing and running the conversion software and checking the results. Cataloguing and all other operations can continue while the conversion is taking place.

Authority records will be converted separately after bibliographic records are converted and after the installation of the release of Talis Alto that includes MARC 21 Authority Control. Once authority records are converted and linked to MARC 21 bibliographic headings, it will be possible to start doing MARC 21 authority control.

Completion

At the completion stage, libraries will be able to reap the full benefits of the Lyra programme, with more powerful search in the local catalogue and greater interoperability.

At this point they need to install the first Completion phase releases of Talis Alto and Talis Prism, and the tools that will be available to set up and build new indexes. They will also need to consider indexing requirements and configure the system accordingly.

Like the conversion, the re-indexing will be very quick and can run whilst normal operations are continuing, so there is no need to schedule a special time to do it. The results can be checked in Talis Prism whilst your users continue to see the original catalogue. Once happy with the results, libraries can re-configure Talis Prism and Talis Alto to make the new indexes and search options available to users and staff.

6. Lyra Foundation products feature summary

Talis Prism 3.0

1. Enhanced 'Full' record display incorporating:
 - β MARC21 records displayed in their native format.
 - β Unicode characters for scripts in alternative languages.
2. Facilities to support initial experimental MARC21 cataloguing, enabling a gradual transition for cataloguing staff:
 - β Option to suppress the MARC21 version of any individual record from public display (only the TalisMARC version will be visible to users).
 - β Option to globally suppress all MARC21 versions of catalogue records from Prism display.

Talis Alto 3.0

1. Facility to import, store, display and edit records in their full native MARC21 format.
2. Tools which enable display, input and editing of Unicode characters using a variety of input methods (including on-screen keyboard or character picker).
3. Tools to simplify the transition for staff as they move to MARC21 cataloguing, including:
 - β Dual support for TalisMARC and MARC21 records to enable staff to start MARC21 cataloguing, and provide a gradual staged conversion of the ILS to MARC21. In this interim stage every MARC21 record is automatically converted to TalisMARC when it is imported or saved.
 - β Protected editing which ensures that cataloguers don't make conflicting edits when a record exists in both TalisMARC and MARC21 format in the local catalogue. Staff are prevented from editing the TalisMARC version of a record for which a MARC21 records exists in the local catalogue. This ensures that any individual record is consistently edited in MARC21 format.
 - β Dual format views within the cataloguing editor, Quick Manage Work form, and bibliographic search results, which enables staff to easily move between the MARC21 and TalisMARC version of a record.
 - β Default MARC21 view for new record creation which prompts staff to start working in this format.
4. Additional guidance to assist with record correctness and good cataloguing practice:
 - β Thorough validation of MARC formatting
 - β Non-standard/invalid record elements are highlighted within the MARC21 record.
 - β New quick editing options, including choice of position for inserted rows.
 - β Structured tag tree offers a picklist of permissible fields and once selected, only sub-fields appropriate to the parent field.

- β Experts can enter fields and subfields directly; they will be validated automatically.
 - β Accidental overwriting of a field during editing is prevented. If the cursor is not positioned by the editor, then input is automatically appended to the end of the existing field or sub-field text, rather than overwriting field contents.
5. New and improved cataloguing editor, featuring larger fonts and improved contrast.
 6. New flexibility in search setup to enable faster searching of preferred targets. In configuring Talis Alto search, Talis Base 2.0 datasets can be selected and set up as a group which can then be searched as a single target. As many groups can be set up as required to suit your local preferences.
 7. Talis Alto 3.0 includes the first phase of the important transition to system generated control numbers, which will enable libraries to have more control over record management and retrieval through Lyra Completion. All new MARC21 records are automatically allocated a system generated control number, rather than taking the ISBN or ISSN as the system identifier.

Talis Base 2.0

1. A fully MARC21 compliant service, with a refreshed Union database converted to the highest standard.
2. Exciting new datasets, including sources focused on non-book materials, like BDS Visual, and LC Serials.
3. A high performance Z39.50 interface, compliant with both Bath (Level 0 and 1) and Z39.89 standards. Connections will be increased, and the ability to implement a greater range of indexes provided.
4. New precision search options, including exact match and first word in field for title, personal author and corporate author.
5. New flexible search options including keyword with right truncation and unanchored phrase for title searches.
6. Fewer restrictions including no restriction on the number of authors that can be retrieved.

Approach the changes to standards with confidence

The Lyra programme offers libraries a complete package of tools and services to enable them to adapt to the changes in MARC and the ISBN with confidence and with minimal disruption.

At the same time, the Lyra programme introduces a range of product enhancements enabling libraries to increase productivity and improve services.

For more information, please visit: <http://www.talis.com/lyra> or contact Terry Willan at terry.willan@talis.com If you would like more information please contact sales@talis.com or talk to your account manger.



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