



# **Talis Alto 4.0 and 4.1 Feature Guide**

**March 2007**

## About this document

This document describes the functionality available in Talis Alto 4.0 and Talis Alto 4.1 as part of the Lyra Programme. The features included in each release are listed separately, so that libraries upgrading from Talis Alto 4.0 to 4.1 can see the changes between the two versions. The document is intended for Talis System Managers and for library staff.

For more information about The Lyra Programme, please refer to [www.talis.com/lyra](http://www.talis.com/lyra).

## Contacting Talis

If you are experiencing difficulties, please contact your System Manager/IT Department in the first instance. You can now raise calls using Talis Solutions, Talis' 24 x 7 customer support web based service. You must have a user name and password to access the customer support web site.

### Talis Support

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# 1. Talis Alto 4.0

Talis Alto 4.0 contains the following new functionality:

## 1.1 Talis Alto

### Searching

- Search form re-written with new look and feel
  - Font size has been increased
  - Screens are clearer and easier to read
- Local searches use new indexes
  - The new indexes provide more flexibility in searching
  - Search results are sorted by title
- Search qualifiers introduced (shorter list of indexes)
  - Each type of search may be performed with different search qualifiers (such as 'Exact', 'First characters', 'Keyword – right truncated') to make the search more precise
  - These are shown in a separate field on the search form, with a drop-down list to allow selection
  - Each one defaults to the most suitable for each index, so most users will not need to change the qualifier
- Search by location
  - A search may be limited to a particular location, by selecting the index 'Location' and entering the site code
- Limit by collection
  - A new 'Collection' field, with a drop-down list, allows searches to be limited to a collection
  - This allows users to limit by collection in the same way as when using Prism
  - Inter-library loan records will be included in the search if no collection is specified (in previous versions of Alto, most libraries did not index records used for Inter-library loans)
- Dual search for ISBN 10 and 978-prefixed ISBN
  - When using the specific 'ISBN' search, inputting a 10-digit ISBN will also search for records containing the 13-digit equivalent. Inputting a 978-prefixed 13-digit ISBN will also search for records containing the 10-digit equivalent
- Ability to search suppressed records
  - Records that are marked as 'Suppress from OPAC' are now indexed, and can be searched by ticking a new 'Include suppressed records' box on the search form
  - This allows staff to search for suppressed records (for example, records used for standing orders), while still hiding them from Prism users and staff who do not want to see them
- Ability to copy from the new-style grids
  - Highlight the row containing the data you want to copy, right-click on the grid, select 'Copy to clipboard' and then the column name.

- For local searches, items/holdings are now shown on a separate tab, rather than below the Full record display

### Authority control

- Create/edit MARC21 authority records
  - MARC 21 authority records can be created, and existing (converted) records can be edited
- Authority search
  - Authority records can be searched using similar indexes and search qualifiers as in bibliographic search

### MARC21 editor improvements

- Talis MARC elements removed
  - There is no longer an option to view the TalisMARC record
  - The 'Delete MARC21 Record' button has been removed
  - The 'Suppress MARC21 from Prism' option has been removed
  - The control number of the TalisMARC record is now displayed on the 'Details' tab
  - When linking to Parent records, input the BibID of the parent record, not the TalisMARC control number
- Overwrite another record
  - This option has been re-introduced for MARC 21 records
  - Input the BibID of the record to be overwritten
- Input non-standard tags
  - Libraries can define MARC tags that are not used in the MARC 21 standard, for their own use
  - Please contact Talis if you require this feature

### Record matching

- Uses numbers within the MARC21 record to identify possible matches
  - When a record is imported or created, numbers within the MARC 21 record are checked to see whether they match existing records. These numbers are contained in the following fields:
    - 001 (only if the code in 003 is the same)
    - 010
    - 015
    - 016
    - 017
    - 020
    - 022
    - 024
    - 035 (in combination with the MARC organisation code in 003)

- MARC Import manager has been amended to use the same logic, and the wording of each report has been amended, so that it no longer refers to TalisMARC control numbers

## Other areas of Alto

- Display of Bib ID
  - On each form where the 'Work' field is displayed, a new field has been added, to show the BibID of the record to which the reservation, order etc is linked
- New 'Product identifier' field in Acquisitions
  - This field allows standard numbers (ISBNs, ISSN etc) contained in the MARC 21 record to be selected. It is the number in this field that is sent to the supplier. Note that for EDI orders this is still limited to ISBNs only. For other types of numbers (e.g. publishers' numbers for AV material) you must continue to put the number in the field agreed between the library and the supplier)
- New, MARC21, quick manage work and ILL work forms

## Indexing

- New indexing mechanism (Zebra)
- Real-time indexing
- More indexes for local searching

## Defect fixes

See the release notice (Appendix A) for a list of defect fixes included in Talis Alto 4.0

## 1.2 Batch scripts

### Amendments for MARC21

- work\_logdelete.pl – now sets a suppression flag on the MARC 21 record as well as inserting 150\*x in the TalisMARC record
- orr\_import – now inserts a dummy row into WORKS\_META in cases where it creates a bibliographic record
- ite\_wrk\_update – inserts a row into the new SEARCH\_WORKS table for each Cataloguing Service record
- update\_opac – checks whether the mcoll\_dae is already running (as part of the grabber script)
- mcoll\_dae – updates WORKS\_META.MODIFIED date, so that records will be re-indexed when collection information has been updated

### New script to apply MARC21 record suppression

- works\_meta\_suppress.pl – needs to be run once after the upgrade to Alto 4.0

## 1.3 Alto MARC Import Manager

### Amendments for record matching

- Uses the same record matching logic as online import (see above)

## 1.4 Alto MARC Importer (Cataloguing Service)

### PC utility to search and import Cataloguing Service records

- The Cataloguing Service search/import process can now be run automatically each day, without user intervention

## 1.5 Alto MARC Conversion Manager 2.0

### Amendments to handle conversion of Authority records

- After upgrading to Alto 4.0, the existing MARC Conversion Manager software will offer the option to convert authority records as well as bibliographic records

### Auto-convert option

- The MARC Conversion software can now be run automatically, to convert records added by orr\_import, Public purchase requests and Self-service ILLs

## 2. Talis Alto 4.1

Talis Alto 4.1 contains the following new functionality:

### 2.1 Talis Alto

#### Authority control

- Flags now appear in the bibliographic editor form, showing whether the authorisable fields are authorised
- Editing the established heading in an authority record now updates the bibliographic records that contain that heading
- Authority records can be merged, removing the unwanted headings and updating the bibliographic records that contained them
- Authority search results are now sorted by the main heading
- A report can be produced, showing the authority status of headings in all bibliographic records that have been created, imported or edited since the report was last run

## Overwriting records

- When overwriting records the TalisMARC control number will now be changed to reflect the ISBN of the overwriting record.

## Record matching

- This has been amended so that it uses a new database table (M21\_STANDARD\_NUMBER) to check for existing records that contain numbers within the MARC21 record to identify possible matches, rather than using the indexing sub-system as in Alto 4.0.
- Numbers in field 028 are now also checked
- MARC Import manager has also been amended
  - to use the new database table
  - to update a previous version of the same record (using the 001 and 003 fields of the incoming record) without checking for other records that may contain the same standard numbers

## Contribution to Talis Base

- New records and imported records now default to 'Contribute' status, unless the user does not have the 'Contribute to Talis Base' enablement
- There are now two separate contribution types for 'Local protect – not contribute' and 'Local protect – contribute', so that records may be contributed even if they are protected from being overwritten
- A new web service will handle the contribution of records to Talis Base

## Indexing

- The scripts for running the grabbing and indexing processes have been revised to make it easier for libraries to control the processes themselves
- Records imported without being edited will now be searchable in Prism the same day (in Alto 4.0 they had to be updated by the wku\_update.pl script overnight, before they would be processed)

## Defect fixes

See the release notice (Appendix A) for a list of defect fixes included in Talis Alto 4.1

## 2.2 Batch scripts

### Amendments for ISBN-13

- The import of EDI Quotes (orr\_import) now uses both the 10-digit ISBN and its 13-digit equivalent when checking whether a bibliographic record already exists on the database
- The import of item fulfilments for Cataloguing Service (ite\_wrk\_update) now uses both the 10-digit ISBN and its 13-digit equivalent when checking whether the ISBN matches the item and order it is fulfilling
- ite\_wrk\_update can now handle 13-digit ISBNs with the 979- prefix

## 2.3 Alto MARC Import Manager

### Amendments for record matching

- Uses the new M21\_STANDARD\_NUMBER table to identify matching records
- Updates an earlier version of the same record from the same supplier without checking for other matching records by ISBN etc

### Enhancements for handling e-resources updates

- Allows for existing hotlink and holdings data to be replaced by data contained in an updated record
- Allows for record deletions

## 2.4 Alto MARC Conversion Engine

### Amendments for record matching

- The auto-conversion process now updates the new M21\_STANDARD\_NUMBER table to identify matching records

### Amendments for authority control

- Records converted by the auto-conversion process will be included in the report that shows the authority status of bibliographic records